

## \$50M+

Enterprise AI revenue influenced through discovery, demos, implementation strategy, and expansion

## 100+

Production deployments across AI, workflow, CRM, ITSM, telephony, and API ecosystems

## 3 -> 50

Global SA/SE practice scaled with onboarding, enablement, certification, and best practices

## 10+ yrs

Customer-facing technical leadership across ambiguous enterprise transformation work

## SUMMARY

Customer-facing AI solutions leader with 10+ years helping enterprise teams turn ambiguous workflow pain into adopted technical systems. Built and scaled global solution architecture practices, led 100+ AI and automation deployments, and created reusable discovery, implementation, enablement, and value-engineering frameworks for enterprise customers. Brings the founding post-sales SE profile: technical enough to work with APIs, integrations, agents, and governance patterns; commercially fluent enough to drive adoption, retention, and expansion with executives, operators, product teams, and end users.

## CORE COMPETENCIES

### POST-SALES TECHNICAL PARTNERSHIP

Discovery	Adoption
Enablement	Expansion
CS Partnership	Training
Stakeholders	Workshops

### AI AGENTS & WORKFLOW AUTOMATION

Agentic Workflows	Prompt Patterns
RAG	LangGraph
Tool Calling	Human-in-Loop
Agent Assist	Automation

### ENTERPRISE INTEGRATION & SCALE

REST / APIs	Webhooks
CRM / ITSM	Slack / Notion
ServiceNow	Salesforce
Documentation	Governance

## ROLE FIT

### BUILD

Has built SE operating models, enablement, playbooks, and reusable delivery patterns from ambiguous starts.

### PARTNER

Advises executives, operators, engineers, security stakeholders, and end users through complex AI adoption.

### ADOPT

Turns use cases into workshops, implementation plans, demos, training, and measurable value cases.

### SCALE

Translates recurring customer needs into frameworks, documentation, product feedback, and best practices.

## EXPERIENCE

### Quant

Nov 2025 - Jan 2026 Remote

### Vice President, Business Solutions - GTM, Customer Strategy & Agentic Business Lifecycle

#### AI OPERATING MODEL, DISCOVERY & VALUE ENGINEERING

- Designed **VEQTOR**, the Quant Vision Engine for Knowledge, Transformation, Operations, and Revenue: a six-axis operating blueprint aligning presales, demo engineering, skunkworks, and sales operations into one governed customer lifecycle system.
- Authored Quant's Enterprise Operating Blueprint, mapping a nine-phase customer journey across business-unit quadrants so sales, delivery, customer success, and product teams could qualify, design, implement, and expand enterprise AI opportunities with a common operating language.
- Built the AI Discovery & Qualification toolkit: opportunity qualification framework, use-case discovery guide, solution discovery workbook, BRD templates, and strategic demo playbook for consistent customer workshops.
- Authored Quant's Value Engineering Framework with CFO-ready ROI formulas tying CX workflow modernization to measurable outcomes including containment, FCR, labor capacity, cycle-time reduction, and cost-to-serve.

#### AGENT ECOSYSTEMS, INTEGRATIONS & REUSABLE PATTERNS

- Designed the **Agentic Business Lifecycle** to extend beyond chatbot deployments into orchestrated workflow automation with human-in-the-loop approvals, evidence capture, and closed-loop KPI feedback.
- Developed an **Enterprise Work Graph** model normalizing ServiceNow, Jira, Salesforce, ITIL, Agile, and automation work into a canonical flow: signal to work item to decision to action to evidence to outcome.
- Authored a voice-streaming connector strategy across major CCaaS platforms, reducing multi-platform integration effort and improving delivery velocity.
- Led strategic customer conversations to convert fragmented engagement workflows into tailored adoption roadmaps, implementation-ready architectures, and reusable agent workflow patterns.

### SoundHound AI / Amelia (formerly IPsoft Amelia)

Apr 2019 - Oct 2025 Austin, TX / Remote

### Senior Director, AI for Enterprise & Global Solution Architecture

#### ENTERPRISE CUSTOMER PARTNERSHIP & PRACTICE BUILD

- Built and scaled enterprise CX solution architecture capabilities, partnering directly with CIO, CMIO, CXO, and contact center stakeholders to redesign customer and patient engagement workflows.
- Led advanced implementation programs across access, intake, scheduling, waitlist recovery, no-show recapture, post-visit collections, and service operations through conversational AI and workflow modernization.
- Founded NASA (Network of Amelia Solution Architects) and scaled global SA/SE from 3 to ~50 across four business units and four regions.
- Designed the global SA/SE operating model: hiring profiles, onboarding, enablement curricula, certification paths, Communities of Practice, utilization standards, and regional delivery cadence for consistent technical partnership.

#### ADOPTION, EXPANSION & TECHNICAL EXECUTION AT SCALE

- Influenced **\$50M+ in enterprise AI outcomes**, including \$17M Visionworks, \$9M SCE displacement, and \$6.25M Chipotle through discovery-led solutioning and executive technical strategy.
- Led **100+ production deployments** across Genesys, NICE, Five9, AWS Connect, EHR, CRM, ITSM, and API ecosystems.
- Built PoC governance, adoption-readiness, and demo frameworks that gave customers clear success criteria, technical implementation paths, and measurable value cases.
- Owned executive demos, technical presentations, training, and RFP/RFI support across regulated enterprise programs, translating complex AI behavior into clear business value for technical and non-technical audiences.
- Trained and optimized TensorFlow, PyTorch, and BERT-based intent classifiers using F1, precision/recall, confusion matrix analysis, threshold tuning, and production iteration.

#### CUSTOMER FEEDBACK, FRAMEWORKS & PRODUCT INFLUENCE

- Delivered three 2025 analyst placements end-to-end - Everest Group PEAK Matrix Leader, IDC MarketScape Leader, and Gartner Magic Quadrant Visionary in Conversational AI - owning pipeline, briefings, and demos.
- Authored *Architecting Certainty*, a high-stakes demo and presenter methodology operationalizing the Golden Demo Library, PoC governance, and analyst-briefing posture across the global SE/SA practice.
- Turned recurring customer implementation patterns into reusable demo assets, discovery guides, governance models, and product feedback for engineering, product, delivery, and GTM teams.
- Authored Amelia's regulatory compliance reference guide spanning HIPAA/HITECH, GDPR, EU AI Act, ISO/IEC 42001, NIST AI RMF, BIPA, COAIA, and 20+ international AI and privacy frameworks.

**OneSupport** (formerly teleNetwork, Inc.)

Feb 2007 - Sep 2018 Austin, TX

#### Operations Manager - Technical Operations & Automation Builder

- Productized internal automation into a SaaS platform licensed to Frontier Communications (~\$2M ARR), replacing manual dispatch workflows with structured automation, reporting, and operational controls.
- Led 40+ person technical operations teams supporting telecom, broadband, and field service programs with top-decile quality, efficiency, and CSAT.
- Built operator-facing workflows across CRM, WFM, dispatch, reporting, escalation, and omnichannel routing patterns, creating a practitioner foundation for later AI workflow adoption and customer enablement work.

#### SELECTED TECHNICAL DEPTH

AI / AGENTS	Agentic workflows, prompt engineering patterns, RAG, LangGraph, tool calling, human-in-the-loop approvals, Judge LLM.
INTEGRATIONS	REST/OpenAPI, webhooks, Salesforce, ServiceNow, Jira, Confluence, CRM/ITSM/EHR, workflow automation, lightweight tooling.
CUSTOMER PLATFORMS	Genesys, NICE, Five9, AWS Connect, custom SIP, LiveKit, Twilio, IVR/ACD, agent console integration.
GOVERNANCE	SOC 2, HIPAA/HITECH, FedRAMP concepts, ISO 42001, EU AI Act, NIST AI RMF, PoC and evaluation governance.

#### SPEAKING · ANALYST · FRAMEWORKS · EDUCATION

SPEAKING	Gartner, Forrester, NVIDIA GTC, HIMSS, CCW; MBA guest lectures.
ANALYST	Everest Group PEAK Matrix, IDC MarketScape, Gartner Magic Quadrant conversational AI positioning support.
FRAMEWORKS	<i>Architecting Certainty</i> , Enterprise Work Graph; Domain Intelligence Schema; AI governance and compliance playbooks.
EDUCATION	A.A.S., Computer Networking - ITT Technical Institute (2006) IBM Data Science Professional Certificate CCNA (prev.)

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