

Beau Lewis

✉ beaumlewis@gmail.com 📞 (513) 401-3005 🌐 in/beaumlewis

SUMMARY

Senior Technology Leader & Solution Architect specializing in Microsoft Dynamics 365 and enterprise architecture. Experienced in designing and productizing large-scale CRM solutions, integrating Azure and AI services, and leading high-performing engineering teams. Strong track record driving cloud transformations, product strategy, and aligning technical solutions with business goals across multiple industries.

EXPERIENCE

Engineering Director, Tax Product Development | BDO

January 2025 - Present, Cincinnati, OH

- Lead the technology strategy and execution for BDO Tax Userverse, an enterprise project management platform built on Microsoft Dynamics 365 Project Operations and SharePoint Online.
- Oversee architecture, engineering, and delivery of a scalable platform supporting project planning, resource management, engagement tracking, and workflow automation for tax operations.
- Drive the strategic integration of AI and automation to optimize processes and enhance user experience across tax service lines.
- Collaborate with senior tax leadership and product management to define cloud-based product strategies for tax services.
- Develop and enforce standards, processes, and procedures to ensure high-quality, secure, and compliant solutions.
- Foster a culture of innovation, excellence, and accountability, driving professional growth and aligning resources to strategic priorities.
- Serve as technical architect, designing scalable, maintainable, and secure solutions for complex enterprise systems.

Director of Technology Solutions | TrellisPoint

August 2020 - December 2024, Cincinnati, OH

- Architected and delivered complex Microsoft Dynamics 365 (Sales, Customer Service, Field Service) and Power Platform solutions, including Canvas & Model-Driven apps, Azure Functions (.NET & Python), and LLM integrations using Copilot Studio and Azure AI Foundry.
- Built end-to-end data pipelines and integrations using Data Factory, KingswaySoft (SSIS), Dataflows, and Dual-Write to enable reliable, real-time enterprise data synchronization.
- Implemented Microsoft Fabric and Synapse Link for Dataverse to centralize operational data in OneLake, enabling modern data warehousing, advanced analytics, and downstream integrations.
- Partnered with Delivery leadership to identify skill gaps and implement targeted mentoring and training programs to scale team capabilities.
- Led product design and productization initiatives, defining solution roadmaps, packaging offerings, and establishing reusable patterns to enable scalable delivery.
- Assisted in pre-sales design and architecture, collaborating with sales and marketing to develop targeted demos and articulate technical value to prospective clients.

Dynamics CE Solution Architect | American Society of Clinical Oncology

April 2020 - August 2020, Washington, DC

- Engineered and deployed robust integrations between Dynamics 365 and legacy systems—streamlining membership profile management across multiple product teams and improving data consistency.
- Extended the Dynamics platform with custom Power Automate flows, C# plugins, and workflow utilities, complemented by SSIS packages to automate key business processes.
- Authored and maintained end-user training guides and documentation, driving user adoption and minimizing support requests through clear, task-oriented materials.
- Partnered with cross-functional stakeholders to align technical solutions with business objectives, ensuring seamless operations creating a culture of continuous improvement.

Dynamics CE Solution Architect | Indigo Beam

January 2020 - April 2020, Orlando, FL

- Led product development for a Timeshare sales and management platform built on Microsoft Dynamics 365, enabling integrated property management, event scheduling, and sales tracking.
- Architected and deployed complex integrations between Dynamics 365 and on-premises timeshare systems to automate sales, reservations, and resort operations.
- Streamlined workflows and real-time data synchronization, eliminating manual processes and bridging sales and resort management functions.
- Drove iterative pilot testing and user feedback loops to optimize performance, refine features, and accelerate platform adoption.

Solution Architect | PowerObjects

August 2017 - January 2020, Cincinnati, OH

- Served as Field Service Solution Architect focusing on Dynamics 365-based asset management and service operations.
- Translated complex business requirements into technical and functional designs, guiding end-to-end solution development.
- Extended Dynamics 365 Customer Engagement using OOTB configuration, custom workflows, C# plugins, Actions, Web API integrations, and Portal customizations to meet diverse operational needs.
- Leveraged Azure serverless technologies (Azure Functions, Logic Apps) to automate complex business processes and integrate with legacy systems.
- Established reusable code libraries, development standards, and training assets, with a focus on Field Service and bespoke app development.
- Mentored junior and offshore developers through structured training, code reviews, and knowledge-sharing, raising overall team capability.

Senior Consultant | AlfaPeople

December 2016 - August 2017, New York, NY

- Designed and implemented Microsoft Dynamics 365 CRM solutions, focusing on both technical and functional delivery for large, complex client engagements.
- Developed business automations using the Power Platform, including Power Apps and Power Automate, to modernize and extend client application landscapes.
- Led client engagements to migrate, extend, and optimize CRM systems, collaborating with cross-functional teams to deliver scalable, high-quality solutions.

IT Director | Health Carousel

January 2014 - December 2016, Cincinnati, OH

- Managed IT department P&L, driving cost efficiency, performance optimization, and strategic investment across global operations.
- Oversaw network and server infrastructure, including Active Directory, DNS, and core enterprise services, ensuring scalability, security, and high availability.
- Led the implementation of Microsoft Dynamics 365 CRM, improving productivity, data visibility, and cross-office collaboration.
- Directed IT strategy and modernization initiatives, aligning infrastructure, security, and business systems to support organizational growth.

Dynamics CRM | Self-Employed / Freelancing

January 2011 - January 2014, Huntington, WV

- Led migration and upgrade projects from Microsoft Dynamics CRM 4.0 to CRM 2011, including solution architecture, data migration, and system reconfiguration.
- Refactored legacy customizations (plugins, workflows, JavaScript, and C# components) to align with CRM 2011 frameworks and supported features.
- Upgraded and optimized integrations with external systems using Web API, SSIS, and custom middleware to ensure continuity and improve performance.
- Collaborated with client teams to plan upgrade roadmaps, mitigate risks, and ensure smooth adoption of the new platform.

EDUCATION

Bachelor of Business Administration | Marshall University

Minor in Accounting, Huntington, WV, 2011

CERTIFICATIONS

Microsoft Certified: Power Platform Solution Architect Expert | Microsoft

Microsoft Certified: Power Platform Developer Associate | Microsoft

Microsoft Certified: Dynamics 365 Sales Functional Consultant Associate | Microsoft

Microsoft® Certified Solutions Associate: Dynamics 365 | Microsoft

SKILLS

Strategic planning; Power Platform; Power BI; SSIS/SQL Server Administration; Azure Functions; Entra; .Net; Python; JavaScript (bootstrap, node);
