OMAR PATEL

SaaS Implementation | Professional Services | Customer Success | Technical Consulting
Chicago, IL | Remote • Hybrid • On-Site
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PROFESSIONAL SUMMARY

Senior SaaS implementation and professional services consultant with extensive experience helping customers move from **"we bought the technology" to "we're successfully using it."** Experienced leading complex SaaS implementations, enterprise technology deployments, system configuration, integrations, data migration, and customer enablement across SMB, mid-market, and enterprise environments.

Brings a practical combination of technical knowledge, project ownership, and customer-facing experience. Skilled at translating business requirements into workable solutions, coordinating technical and business stakeholders, identifying risks before they become problems, and keeping implementations moving toward a successful go-live.

Strong background in **SaaS onboarding, solution design, API integrations, data validation, change management, technical training, user adoption, and post-implementation support**. Known for building trust with customers, communicating clearly across technical and non-technical teams, and staying focused on the outcome—not simply completing the implementation.

CORE COMPETENCIES

SaaS Implementation & Onboarding • Professional Services • Customer Success & Adoption • Technical Consulting • Enterprise Implementations • Client Enablement • Solution Design & Configuration • Requirements Gathering • Project Delivery • Stakeholder Management • Data Migration & Validation • API & Third-Party Integrations • Risk & Dependency Management • Change Management • Go-Live Readiness • Technical Training • Process Improvement • Vendor Management • Cross-Functional Collaboration • Client Escalation Management • Operational Readiness • Workflow Analysis

PROFESSIONAL EXPERIENCE

KASEYA

Senior Professional Services Consultant

June 2024 – October 2025 | United States | Hybrid

- Owned implementation and transformation engagements for 150+ global Managed Service Provider (MSP) clients, helping customers move from planning and configuration through operational readiness and production.
- Served as a trusted advisor to MSP leadership, connecting business objectives to the Kaseya 365 portfolio across endpoint management, cybersecurity, compliance, and SaaS solutions.
- Led discovery, solution design, configuration, testing, and validation for complex SaaS deployments, translating customer requirements into practical workflows and system configurations.
- Configured API integrations and AI-enabled workflows to support customer-specific business processes and address gaps between standard product capabilities and real-world operating requirements.
- Worked directly with client stakeholders to identify dependencies, workflow gaps, technical blockers, and deployment risks early enough to keep projects and SLAs on track.
- Helped customers navigate operational change by explaining new workflows, clarifying responsibilities, and preparing teams for adoption and go-live.
- Designed and delivered 1,000+ technical training workshops and remote strategy sessions, helping customers build product proficiency and transition toward self-service.
- Worked alongside Technical Account Managers, Customer Success teams, vendors, and technical specialists to resolve architectural issues, address data migration challenges, and keep customer priorities visible throughout delivery.
- Helped customers connect technology investments to practical improvements in efficiency, workflow, and day-to-day operations.

VARIOUS ORGANIZATIONS

SaaS Implementation Consultant — Contract Engagements

September 2018 – May 2024 | USA, Barbados & Canada | Remote

Provided freelance SaaS implementation and technology consulting services through a series of 3–6 month engagements supporting SMB and startup organizations.

- Took ownership of implementations across a range of SaaS environments, quickly learning new products, business processes, and customer requirements at the start of each engagement.

- Led implementation and configuration of a global payroll platform and Applicant Tracking System (ATS) for a rapidly scaling workforce, including data mapping, validation, system setup, and rollout.
- Worked with external software development teams to turn operational requirements into practical technical solutions, including chatbots and IVR-based automated communications.
- Guided non-technical stakeholders through critical data and process migrations to AWS and Microsoft Azure, coordinating timelines, vendor deliverables, expectations, and dependencies.
- Worked directly with customers to identify configuration issues, integration challenges, data problems, and workflow gaps, then coordinated the appropriate technical resources to resolve them.
- Created customer-facing knowledge-base content, training materials, and documentation that helped users become comfortable managing their systems after implementation.
- Managed short implementation cycles where establishing credibility quickly, communicating clearly, and keeping customers focused on the next milestone were essential to successful delivery.

HP

Technology Implementation Consultant III — Managed Enterprise Services

August 2010 – August 2018 | United States | Remote

- Led discovery, solution design, and implementation of enterprise technology and Managed Print Services (MPS) solutions for Fortune 100-level and other major enterprise clients.
- Worked with organizations across healthcare, travel, hospitality, education, retail, and financial services, adapting solutions to different business processes, technical environments, and operating requirements.
- Facilitated technical discovery sessions with client stakeholders to understand business processes, define requirements, configure environments, and establish practical implementation plans.
- Managed technical workstreams and implementation timelines, identifying risks and dependencies early and coordinating the resources needed to keep deployments moving.
- Worked closely with pre-sales engineers, project managers, technical specialists, and client teams to collect data, validate requirements, resolve issues, and reduce friction during implementation.
- Acted as the bridge between business requirements and technical execution, helping customers understand what was required from their teams and what the technology would deliver.
- Developed and delivered technical documentation and operational training to prepare customers for go-live and support continued user adoption.
- Supported complex enterprise deployments where successful delivery depended on clear communication across customers, vendors, technical teams, and internal stakeholders.

MODIS INC.

Implementation Project Manager — National Accounts

May 2008 – July 2010 | United States | Hybrid

- Directed large-scale, multi-location technology implementations and software rollouts for major hospitality and retail organizations, including Disney, The Home Depot, and Bank of America.
- Coordinated deployment activities across distributed client environments, including project planning, system configuration, data validation, site readiness, and launch support.
- Worked with third-party vendors and internal engineering teams to resolve technical blockers, connect disparate systems, and keep site launches moving.
- Served as the day-to-day connection between customer teams, technical resources, vendors, and project stakeholders, keeping requirements and deliverables aligned.
- Guided non-technical client teams through operational changes and provided the training and support needed for employees to adopt new systems.
- Managed changing requirements, dependencies, and implementation issues while keeping attention on the overall launch timeline.

TECHNOLOGY & SOLUTION EXPERIENCE

SaaS & Enterprise Technology: SaaS Platforms • Enterprise Software • Endpoint Management • Cybersecurity • Compliance Solutions • Managed Services • Managed Print Services • Payroll Systems • Applicant Tracking Systems

Implementation & Integration: System Configuration • SQL • API Integrations • Third-Party Integrations • Data Migration • Data Mapping • Data Validation • Workflow Configuration • Solution Design • Testing & Validation • Go-Live Readiness

Cloud & Automation: AWS • Microsoft Azure • AI Workflows • Chatbots • IVR Systems • Automated Communications

Customer & Project Delivery: Client Onboarding • Professional Services • Customer Success • Technical Consulting • Project Delivery • Stakeholder Management • Change Management • Risk Management • Vendor Coordination • User Training • Customer Adoption • Knowledge Transfer • Excel • Smartsheets • Asana • Salesforce • Microsoft Office Suite • Google Suite

Collaboration Tools: Microsoft Teams • Zoom