

CHANCE LIPPIE

Technical Business Analyst | ERP & CRM Systems | Process Improvement | Agile Delivery
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PROFESSIONAL SUMMARY

Technical Business Systems Analyst specializing in CRM and operational workflow optimization across enterprise environments. Proven track record delivering 5 full-lifecycle implementations and 40+ releases by translating complex business needs into scalable technical solutions — with a 100% UAT pass rate and zero critical defects. Known for driving cross-functional alignment across product, engineering, and operations to improve system efficiency, reduce manual processes, and deliver measurable outcomes. Trained in Lean Six Sigma end-to-end (SIPOC, DMAIC). Leverages SQL, Power BI, Power Automate, and AI-assisted workflows to accelerate delivery and decision-making. Pursuing CCBA through IIBA. 5+ years proven remote work success.

CORE COMPETENCIES

Requirements Elicitation & Discovery · User Stories & Acceptance Criteria · BPMN Process Mapping · Full Lifecycle System Implementation · UAT Planning & Execution · Defect Tracking & Triage · ERP / CRM Optimization · Power BI Dashboards & Reporting · SQL Data Analysis · Process Automation (Power Automate) · Lean Six Sigma (SIPOC, DMAIC) · Agile / Scrum · Stakeholder Facilitation · Cross-Functional Delivery · Change Management · CCBA Candidate — IIBA

TOOLS & PLATFORMS

ERP / CRM: Microsoft Dynamics 365 (Finance & Operations, CE), Acumatica, Salesforce, HubSpot, Bridgeline, Braze, CORE/OneTouch

BI & Analytics: Power BI, SQL, Excel (Advanced), Google Analytics (GA4), OpenAI Advanced Data Analysis

Automation & Collaboration: Power Automate, SharePoint, Microsoft Teams, Jira, Confluence, MS Projects

Process & Design: Lucidchart, Visio, BPMN | AI & Emerging: Generative AI tools, prompt engineering

PROFESSIONAL EXPERIENCE

Business Analyst — Enterprise ERP/CRM Implementation & Process Improvement | National Notary Association
(Remote) Feb 2023 – Present

- Delivered 5 full-lifecycle ERP/CRM implementations and 40+ scheduled releases — leading requirements discovery, stakeholder workshops, functional specification development, and cross-functional coordination across product, engineering, QA, and operations.
- Applied Lean Six Sigma (SIPOC, DMAIC) to process improvement initiatives — identifying root causes, mapping workflow gaps, and implementing corrective actions that contributed to a 50% reduction in CRM support tickets.
- Built Power BI dashboards, KPI reports, and Power Automate workflows to deliver operational insights and automate recurring processes — reducing manual effort and supporting data-driven decision-making for senior leadership.
- Led UAT planning and execution across all major releases — developing test plans, triaging defects, and validating acceptance criteria to achieve a 100% UAT pass rate with zero critical defects.
- Developed BPMN-aligned process documentation that reduced new-hire training time by approximately one week, compressing a previously 2-month onboarding process.

Business Systems SME — Implementation & Process Support | National Notary Association (Remote) Feb 2021 – Feb 2023

- Served as Subject Matter Expert across ERP/CRM upgrade cycles — contributing requirements input, UAT support, and operational feedback that shaped system configuration and implementation decisions.
- Documented current-state and future-state process maps and workflows, reducing delivery ambiguity for implementation teams and supporting continuous improvement initiatives.

- Created end-user documentation and training materials to support system changes — minimizing post-launch support burden and driving adoption across business teams.

Director of Operations | Abolish Pest Control — Simi Valley, CA

Dec 2016 – Apr 2020

- Co-led all business operations for a family-owned commercial pest control company — overseeing team leadership, multi-site scheduling, client relationship management, and proposal development that drove 98% client retention and 100% on-time delivery across 10+ large-scale weekly engagements.
- Developed and presented commercial proposals for large-scale multi-site contracts — scoping solutions, building cost estimates, and defining risk mitigation strategies that supported consistent business growth.
- Implemented operational systems and performance tracking processes that improved data accuracy, streamlined reporting, and enabled data-driven decision-making across the business.

Business Operations & Marketing Manager | Abolish Pest Control — Simi Valley, CA

Dec 2010 – Dec 2016

- Built and managed all digital marketing operations for the business — including social media, online advertising, and web presence — driving client acquisition and brand growth from the ground up.
- Ran day-to-day office operations including scheduling systems, client database management, documentation, and compliance recordkeeping while also performing field applicator work.
- Contributed directly to business strategy and growth initiatives alongside company leadership — developing operational processes, improving client communication workflows, and laying the foundation for the company's expansion.

CERTIFICATIONS & CONTINUOUS LEARNING

CCBA (Certification of Capability in Business Analysis) — In Pursuit | IIBA

Lean Six Sigma — End-to-End Training (SIPOC, DMAIC, Root Cause Analysis)

Improving Insights with OpenAI's Advanced Data Analysis — LinkedIn Learning, Sep 2025

Generative AI for Business Analysts — LinkedIn Learning, Aug 2025

Independent AI & Automation Projects — Portfolio: chancelippie.com