Rod Rodriguez

AI-Enabled ERP Program Leadership | Applied AI Skills & Capabilities

Summary

ERP program executive (MBA, MS IT; PMP held 2006–2016; 25+ years across Navy MRO, SAP, IFS and NetSuite) who has integrated large-language-model AI into the day-to-day execution of a live NetSuite implementation. Operates Claude as an agentic co-worker connected directly to Jira, Confluence, NetSuite, Gmail, Google Calendar and Google Drive; directs AI-assisted development of a proprietary automation toolset; and has built a library of domain-specific AI personas and working-standard "skills" that make AI output audit-ready and client-facing. Not a developer by trade — the differentiator is knowing how to specify, govern, verify and deploy AI-produced work at production quality inside a regulated, multi-workstream program.

Accomplishments

- Integrated Claude AI into a live NetSuite ERP program via MCP connectors to Jira, Confluence, NetSuite Sandbox and Google Workspace, making AI an operating participant in ticket management, documentation, reporting and configuration.
- Directed AI-assisted development of a 30+ application Python/Node.js automation toolset — dashboards, status reporters, a fit-gap classification engine and transcript consolidators — as a non-developer program lead.
- Engineered ten functional Business Process Owner AI personas and a governing working-standards skill that enforce audit-ready, C-suite-quality AI output across Finance, HR, Materials, Production, QA and Governance workstreams.
- Used AI to plan two CRM-to-NetSuite integration programs end to end, generate the full Jira dependency graph, compute critical path and deliver executive decks.
- Authored team SOPs for AI use in Jira and established engineering controls — full API pagination, 100% self-verification, no hard-coded identifiers — for all AI-produced code.
- Using AI, authored all SOPs required for BL King personnel to execute their day-to-day tasks in NetSuite.
- Stood up the NetSuite AI Connector Service, including MCP role design, feature enablement and integration-record activation, enabling AI-driven configuration and test-data work.

Core AI Skills & Capabilities

Agentic AI Operations (MCP / Connector Integration)

- **Atlassian integration —** runs Jira and Confluence through an AI agent for ticket creation, editing, workflow transitions, dependency linking, bulk field updates, comment threads and Confluence page authoring across twenty-two concurrent project plans.
- **NetSuite AI Connector —** stood up a custom Model Context Protocol endpoint for NetSuite, including non-Administrator role design, OAuth 2.0 and REST Web Services enablement, and the integration-record activation required by Oracle's AI Connector Service.

- **Google Workspace integration —** Gmail, Calendar and Drive wired into the same AI workspace for meeting-series scheduling, mailbox organization and document retrieval from externally-owned shared folders.
- **Atlassian Rovo —** evaluated Rovo Search, Chat and Agents; authored team standard operating procedures for AI use in Jira and for closing tickets through the AI connector; established Rovo prompts as the fallback path where the connector lacks an action.

AI-Assisted Software Development & Automation

- **Proprietary automation toolset —** directed the AI-assisted build of 30+ Python and Node.js applications for the program, including live program dashboards, a changelog-based Jira status reporter, a meeting-transcript consolidator with action-item de-duplication, and mailbox automation utilities.
- **Fit-gap classification engine —** an AI-driven engine that reads requirements tickets from Jira, applies a five-category fit-gap taxonomy (Full Fit / Partial Fit / Gap / Conditional Fit / Controlled by Documented Policy) and writes structured functional and technical specifications back to the tickets, with multi-project batch processing and re-process modes.
- **Engineering standards for AI-produced code —** mandated full API pagination, 100% self-verification before delivery, no hard-coded identifiers without approval, standardized script headers with expected-output documentation, and a branded delivery wrapper with browser-native download.
- **AI API evaluation —** assessed vendor AI agent APIs against a direct LLM API for automated business-process and configuration-guide generation into Confluence and set the architecture direction accordingly.

AI Persona & Skill Engineering (Prompt / Context Engineering)

- **Business Process Owner personas —** authored ten reusable AI persona skills (Finance, HR/HCM, Marketing, Materials Management, Plant Maintenance, Production Planning, Project Systems, QA, Testing, Governance & Risk) that give the model the viewpoint, compliance mindset and NetSuite module knowledge of each functional owner for consistent fit-gap decisions.
- **Working-standards skill —** codified a governing skill that enforces C-suite-ready output, no-guess behavior, plan-confirm-execute for complex work, silent execution, and verified workflow, field and tenant-specific API rules — effectively an operating manual the AI applies on every interaction.
- **Technical reference skills —** built domain skills for NetSuite Production Planning, GoHighLevel CRM and its NetSuite integration, n8n middleware, and structured RFI/RFP response methodology.
- **Persistent context management —** maintains structured AI memory across programs, people and decisions so that work resumes without re-briefing and stored facts are tagged by provenance.

AI-Accelerated Program & Portfolio Management

- **Integration program planning —** used AI to decompose two CRM-to-NetSuite integration options into complete Jira plans, generate full dependency graphs, compute critical path and produce executive decks.
- **Bulk Jira operations at scale —** executed AI-driven sprints of hundreds of ticket updates (due-date rebaselining, milestone link sweeps, work-type labeling, description cleanup, status reassignments) with dry-runs before and verification counts after.
- **Live program reporting —** AI-built dashboards and status reports reconciled against live Jira for the Order-to-Cash workstream, plus a published launch board for a 13-week marketing campaign.

- **Governance and cutover documentation —** AI-drafted, human-verified error-handling, sandbox/change-control and system-administration policies, a cutover runbook, and a policy-and-procedures suite spanning multiple functional modules.
- **ERP test-data engineering —** AI-generated NetSuite sandbox test-data sets (customers, items, sales orders, invoices, payments) with a governed naming convention and CSV-import reference-key mapping; diagnosed import defects (price-level override, tax application, approval status) from live records.

Tools & Technologies

Category	Tools / Platforms
AI platforms	Anthropic Claude (chat, agentic workspace, artifacts, skills, memory), Anthropic API, Atlassian Rovo (Search, Chat, Agents), AI meeting transcription
Integration protocols	Model Context Protocol (MCP) — Atlassian, NetSuite AI Connector Service, Gmail, Google Calendar, Google Drive; custom MCP endpoints; OAuth 2.0
ERP / business systems	Oracle NetSuite (Production and Sandbox), SuiteApp administration, CSV import, GoHighLevel CRM
Middleware / iPaaS	n8n, Zapier (evaluated and planned for CRM ↔ NetSuite sync)
Work management	Jira Cloud (REST API v3, JQL, Advanced Roadmaps, custom workflows), Confluence (CQL, page authoring)
Languages / libraries (AI-directed)	Python, Node.js, docx-js, pptxgenjs, HTML/JS delivery wrappers
Deliverable formats	DOCX, XLSX, PPTX, HTML dashboards, published artifacts