

Sage Dutra

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SENIOR SOLUTIONS ARCHITECT | AI & AGENTIC SYSTEMS | SALESFORCE ARCHITECTURE | DIGITAL TRANSFORMATION

PROFESSIONAL EXPERIENCE

AI Systems Architect

2018 – Present

Upswing | Salem, OR

- Architected and operated FORGE, a production multi-agent AI platform on Temporal.io, and a second multi-agent system on LangGraph (Solutions Factory), with human-in-the-loop governance, model routing, and deterministic validation.
- Achieved a 16-minute median website generation cycle across 56 benchmarked runs using a multi-agent architecture (Claude, Gemini, Perplexity) to automate research, content, enrichment, outreach, and onboarding.
- Developed a proprietary prospect intelligence engine that narrowed a reservoir of 45,000+ licensed contractor records to 2,400 decision-ready prospects through multi-source enrichment, AI-driven scoring, and decision modeling.
- Delivered 9 Salesforce implementations, including 7 net-new deployments and 2 enterprise overhauls, leading discovery, solution architecture, configuration, data migration, process redesign, adoption strategy, and end-user enablement.
- Facilitated 100+ stakeholder workshops and multi-day discovery engagements, translating business requirements into BRDs, process maps, workflow designs, service blueprints, customer journey maps, and scalable technology solutions.
- Integrated Salesforce and CRM ecosystems with 20+ enterprise platforms including Stripe, HubSpot, QuickBooks, Mailchimp, FormStack, DocuSign, Slack, Google Analytics, and custom API environments.
- Improved organizational adoption and operational effectiveness by training 200+ users and embedding change management, stakeholder alignment, and user enablement throughout every implementation lifecycle.
- Reduced regulated client intake cycles from 7–14 days to 1 day through development of a HIPAA-compliant digital workflow platform later adopted by approximately 15 organizations.
- Maintained a 4.9/5.0 average across 31 public client reviews while delivering more than 90 consulting engagements across nonprofit, clean energy, SaaS, trades, and professional-services organizations.

Founder & Professional Development Facilitator

2023 – Present

ClearHaven | Salem, OR

- Spearheaded a regulated professional-services practice across 50+ client engagements, overseeing compliance, client experience, intake systems, scheduling, documentation, regulatory reporting, and finances.
- Designed secure documentation, workflow, and regulatory reporting systems that improved compliance, operational efficiency, client onboarding, and service delivery.
- Maintained a 100% five-star rating across 26 client reviews through high-touch client engagement, operational excellence, and process-driven service delivery.

Director of Communications

2020 – 2022

Powerfield Energy | Falls Church, VA (Remote)

- Architected the end-to-end Salesforce CRM that generated and tracked \$29,000,000 in projected revenue from signed contracts with paid deposits, building custom forecasting models, executive dashboards, and pipeline-management frameworks.
- Led stakeholder discovery and requirements gathering efforts that guided Salesforce platform selection, business process redesign, custom object architecture, reporting strategy, and operational workflow automation.
- Developed two custom revenue calculators, lead attribution models, automated marketing workflows, and executive reporting tools for commercial solar business development.
- Optimized sales visibility, forecasting accuracy, and leadership decision-making through CRM modernization, workflow automation, analytics reporting, and cross-functional operational reporting.
- Earned promotion from contractor to Director, expanding ownership across CRM strategy, communications, operations, reporting, and digital transformation.

Director, Communications & Recruitment

2016 – 2018

Leadership Nonprofit | Salem, OR (Previously Creative Team Lead, 2014 – 2016)

- Increased annual enrollment from 15 to 118 participants by redesigning recruitment operations, implementing Salesforce automation, and deploying data-driven acquisition and conversion strategies.
- Generated 252 annual applications and achieved a 47% enrollment conversion rate by building a scalable recruitment funnel with CRM workflows, lead attribution, and performance reporting.
- Built a Salesforce-powered admissions ecosystem integrating FormStack, Trello, RingCentral, Zapier, and marketing platforms to automate lead management, application processing, stakeholder communications, and reporting.
- Recruited, trained, and led a 15-person admissions, recruiting, and communications organization while documenting scalable operational processes adopted across other campuses.

EDUCATION

Professional Facilitation Certification

School of Video Production, Cape Town, South Africa

Client ratings: 4.9 average across 31 public Google reviews

SKILLS

Solution Architecture & Delivery: Solution Architecture | Solution Design | Discovery & Requirements Facilitation | Stakeholder Workshops | Business Analysis | Business Requirements Documentation (BRDs) | Process Mapping | Customer Journey Mapping | Service Blueprinting | Proof of Concept (POC) | Roadmapping | Professional Services | Project Delivery

AI Systems Architecture: Agentic AI | Multi-Agent Orchestration | LangGraph | LangChain | Prompt Architecture | Model Selection & Routing | Human-in-the-Loop Governance | Temporal.io | LLM Integration | Evals & Guardrails | Deterministic Validation | Semantic Search

Systems Integration & Data: Salesforce Architecture | HubSpot | Enterprise Integrations | API Integrations | Webhooks | ETL | Data Migration | Data Modeling | CRM Strategy | Business Intelligence | Reporting Dashboards

Transformation & Adoption: Digital Transformation | Business Process Improvement | Business Process Automation | Change Management | User Adoption | End-User Training | Stakeholder Management | Cross-Functional Leadership

Tools: Salesforce | HubSpot | Temporal.io | LangGraph | LangChain | Claude | Gemini | Perplexity | TypeScript | Node.js | Zapier | Stripe | QuickBooks | FormStack | DocuSign | Mailchimp | Slack | Google Analytics | Meta Ads | Google Ads