

# CAPABILITY STATEMENT

## NexAgent Solutions

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## CORE COMPETENCIES

### Digital Transformation & Innovation

- Digital strategy development and implementation
- Legacy system modernization and application development
- Business process mining & re-engineering
- Cloud migration strategy and execution (AWS, Azure, GCP)
- Agile software development and DevOps implementation
- Enterprise architecture and systems integration

### Artificial Intelligence & Automation

- Generative AI strategy and implementation
- Agentic AI system design and deployment
- Robotic Process Automation (RPA) solutions
- Machine learning model development and fine-tuning
- AI-driven data analytics and insights

### Information Management & Security

- E-archive and e-discovery platform development
- Secure data storage and retrieval systems
- Video capture, distribution, and analysis solutions
- Regulatory compliance (PCI, GDPR) expertise
- Enterprise information integration

## FOUNDER'S EXPERIENCE

### Federal/State/Defense Sector Experience

- Led team developing a specialized video capture, distribution, and analysis platform for the Department of Defense. The solution captured high-definition video in the field, implemented tiered storage back to US-based locations, and provided desktop analysis tools for stabilizing video, annotation, and multi-user collaboration.
- Designed enterprise architecture and ontology for Customs and Border Patrol
- Modernized State of Nevada's Medicare Provider Enrollment

- Participated in capture of over \$200m in federal contracts as technology solution lead performing solution design as a core member of Blue team, SME on Red team, and authority on Gold team.
- Supported compliance audits for various federal standards and regulations.
- Experience in SLED (State, Local, Education) and Federal/DoD projects.

## Commercial Successes

- **Cost Savings.** Designed and implemented e-archive/e-discovery platform for global bank, reducing legal request processing time from weeks to hours.
- **Increased Time-to-Value.** Managed restructuring and turnaround of a platform engineering effort for international instant games company.
- **Increased Agility & Time-to-Value.** Designed modern microservices-based SaaS P-card expense management and controls system.
- **Increased Revenue.** Created and operated a microservices-based, SaaS for multi-retailer loyalty that allows one card to support multiple retailers. 0 → 1 effort.
- **Increased Revenue.** Led the emergence of the Enterprise Information Integration industry and associated product from Software AG.
- **Increased Revenue & Drove Cost Savings.** Created industry-first cloud-native platforms supporting warehouse management, retail operations, and logistics using microservices architecture.
- **Cost Savings.** Led elimination of human-led credit line increase/decrease determination through RPA-based automation for Citibank Credit Card Services.

## Past Projects

- **Department of Defense:** Video capture and analysis platform
- **Major Telecommunications Provider:** Migration of customer services platform to microservices architecture
- **Major International Bank:** E-archive/e-discovery platform across Europe and Asia
- **Medicare Systems Provider:** Next-generation enrollment and claims management
- **Automation & Digital Transformation:** Major beauty products company, pet goods provider, valve manufacturer, financial services, retail auto parts

## Books

- Morgenthal, JP. (2014). **Cloud Computing: Assessing the Risks.** IT Governance Publishing. ISBN: 978-1849285735.
- Morgenthal, JP. (2007). **Enterprise Information Integration: A Pragmatic Approach.** Lulu Press. ISBN: 978-1847289889.
- Morgenthal, JP & La Forge, Bill. (2000). **Enterprise Application Integration with XML and Java.** Prentice Hall. ISBN: 978-0130851352.
- Morgenthal, JP. (2005). **A Manager's Guide to Distributed Environments: From Legacy to Living Systems.** John Wiley & Sons Inc: 978-0471197126

## DIFFERENTIATORS

- **Dual Technical & Business Expertise:** Successfully founded and exited two technology businesses, combining deep technical knowledge with business acumen and entrepreneurial vision.
- **In-depth Knowledge of Multiple Industries:** Retail, Supply-Chain, Financial Services, Insurance, Healthcare, Travel & Transportation, Telecommunications
- **Revenue Generation:** Instrumental in helping to close over \$1B in business throughout career.
- **End-to-End Technology Stack Knowledge:** From network infrastructure to user interfaces, providing comprehensive technology solutions that align with strategic business objectives.
- **Emerging Technology Leadership:** Established thought leadership in Cloud, DevOps, and AI through conference presentations, publications, and industry engagements.
- **Hands-On Implementation Capability:** Not just strategic advisory - capable of direct implementation and execution when situations demand immediate action.
- **AI Specialization:** Developed proprietary workshop methodology to guide organizations from business goals to AI agent architecture implementation in under one week.

## COMPANY DATA

**NAICS Codes:** 541512 - Computer Systems Design Services 541611 - Administrative Management and General Management Consulting Services 541690 - Other Scientific and Technical Consulting Services 518210 - Data Processing, Hosting, and Related Services

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## COMMITMENT TO EXCELLENCE

With over two decades of technology leadership experience, I bring a proven track record of innovation and transformation to federal, state and private sector projects. My approach combines strategic vision with practical execution abilities, ensuring technology solutions that drive measurable results while meeting strict government requirements and standards.