

Sheldon McKay

Lead Architect for business systems, integration, data and AI

TOGAF® Enterprise Architecture Practitioner | Azure Solutions Architect Expert | Workato Automation Pro III

Profile

Lead Architect with 10+ years progressing from infrastructure and networking, through Azure consulting, to enterprise and business-systems architecture. At Advania UK I own the architecture of the internal business platform: the Workato integration and API layer, the technical lead-to-cash flow from Dynamics 365 Sales to Business Central, the Azure Databricks lakehouse, and AI agents that automate operational work.

I lead the business systems Technical Design Authority, direct internal engineers and third-party partners to build to its standards, and stay hands-on enough to review every design and validate the results myself. Every requirement and decision is versioned, so the reasoning behind each change is always traceable. Recognised with Advania's UK-wide Going the Extra Mile award (2025) for taking ownership of gaps no one else owned.

Selected outcomes

2 hrs Monthly CSP invoicing for 700 customers, down from over 5 days of manual work	400+ Workato recipes in production on a layered, reusable integration architecture I designed	600 Customers migrated from NetSuite to BillingPlatform in four months, before contract end	30-50 Orders a day validated by an AI agent, saving about 15 minutes of manual checks on each
---	---	---	---

Experience

Feb 2022 – Present
Remote from
South Africa

Advania UK (formerly Content+Cloud)

Internal Lead Architect, Aug 2024 – Present | **Internal Systems Architect**, Feb 2022 – Aug 2024

Architect for the internal business systems team through Content+Cloud's acquisition by Advania Group and rebrand to Advania UK. Promoted to lead the team's architecture, and took on the Data Warehouse Architect role as additional duties.

Leadership and governance

- ◆ Lead the business systems architecture function: an internal Business Central Architect, Azure data engineer, automation engineer and senior engineer, plus outsourced Dynamics 365 and Workato Solutions Architects and their developers across two partners.
- ◆ Lead the business systems **Technical Design Authority**, maintaining the standard patterns and governance every design is reviewed against. I own the functional designs, review every partner's low-level designs before build, and keep requirements and decisions versioned with a decision log.

Lead-to-cash and business applications

- ◆ Designed and own the **technical lead-to-cash flow** across Dynamics 365 Sales, DealHub CPQ, BillingPlatform and Business Central, replacing a manual process with inconsistent selling and uncontrolled data entry. Live within 12 months via Workato and improved in phases since, it handles 200-300 orders a month across MSP and Consulting and is being extended to VAR.
- ◆ Helped select **BillingPlatform to replace NetSuite**, using a weighted scorecard built from business use cases and a vendor questionnaire; one of three technical assessors on a six-person panel. Designed the integration so contracts and service items flow from Dynamics into billing, keeping users in the system they know. Live in Nov 2024, with 600 customers and thousands of subscriptions and usage lines migrated in batches by March 2025.

- ◆ Designed and built a **contract lifecycle management** solution in Dynamics 365 model-driven apps, including the data schema, quote-to-contract automation and DealHub changes. It creates around 500 service items a month and gives account and service managers an accurate view of every customer's services, after a major clean-up of service dates and billing terms.
- ◆ Automated **Microsoft CSP billing for 700 customers** by integrating Cloudmore invoice data into BillingPlatform and Business Central, cutting Finance's monthly invoicing from over 5 days to 2 hours of review, with the 1–2 monthly exceptions caught by operations first.
- ◆ Technical owner of **Dynamics 365 Sales** (around 450 users) and **Customer Service** (50 users) and the wider Power Platform, including Dataverse capacity. Moved Finance Operations from email and Teams onto Customer Service with case routing and parallel case tasks, integrated with the customer portal.

Integration, APIs and customer portal

- ◆ Technical and service owner of the **Workato iPaaS** (400+ recipes). Designed its layered system, orchestration and presentation architecture over a common data model, so retiring a source system means swapping one connection rather than rebuilding every integration. Evaluated it against Logic Apps, Azure Functions and Power Automate, and set the standard: Power Automate for work inside Dynamics, Workato for anything that crosses systems.
- ◆ Core architecture stakeholder for **One Portal**, which replaces separate customer portals with one secure view of invoices, credits, subscriptions and quotes. Shaped its access model (invite-only, role-based, SSO), originated features including auditing, notifications, multi-company and partner views, and designed its Workato API layer and CSP self-service tenant onboarding. Scaled from 10 to 100 customers and now rolling out to the full base.
- ◆ Designed SSO across SAML, OpenID Connect and OAuth with Entra ID, including SCIM provisioning and custom-built SCIM integrations.

Data platform

- ◆ Technical owner of the move from a legacy SQL Server ETL warehouse to an **Azure Databricks lakehouse** (ELT, bronze/silver/gold), consolidating 10+ sources including Business Central, Dynamics 365, HubSpot, DealHub, Cloudmore, Kantata and legacy System21 into the company's first validated reporting layer. I own the architecture, security, governance and operations, and specify every new source for the data engineer to build.
- ◆ Aligned pipelines to business units for cost attribution, with refresh matched to need down to every 15 minutes. Added data-quality monitoring, ML forecasting and analyst self-service on silver data, and lead Databricks Genie pilots for CSP and Sales Insights, covering new tenants and revenue, and quote-to-invoice conversion by business unit.

AI and automation

- ◆ Co-wrote the company's **AI governance framework**, setting delivery standards for AI work and secure design of core platforms such as Power Platform.
- ◆ Designed an **order-validation agent in Workato Genie**, chosen after a Copilot Studio trial fell short. It checks 30–50 orders a day, notes every pass or failure and flags issues before release, saving about 15 minutes per order while a person keeps final approval.
- ◆ Built Copilot Studio assistants: an Azure DevOps delivery assistant for a 10-person team with no delivery manager, and an HR and training assistant in Teams answering thousands of questions a month from approved policy content, improved by a monthly review board.

2019 – 2022
South Africa



XContent Business Solutions

Azure Solutions Architect, 2020 – 2022 | **Systems & Infrastructure Engineer**, 2019 – 2020

- ◆ Led the Azure technical practice at a Microsoft Gold Partner and MSP, reporting to the managing director across pre-sales, architecture and delivery assurance. Turned customer assessments into Cloud Adoption Framework roadmaps presented to executive boards.
- ◆ Led the migration of **thousands of VMs and services** from EU Azure regions to the new South African data centres, including moving customers from EA to CSP. Delivered landing zones, hybrid identity and Microsoft 365 migrations, and designed and ran AKS for three customers.
- ◆ Built a **self-service CSP licence portal** with invoicing automated into accounting, and implemented Dynamics 365 Sales internally with Work 365 for CSP billing and Sage integration.

2016 – 2019
South Africa

- ◆ Built the 24/7 operations centre and SOC tooling (Grafana and Prometheus on AKS, Azure Monitor, Sentinel), and took Teams Voice to market as a full PABX product, from AudioCodes SBCs to SIP breakout.
- ◆ Ran FinOps reviews (licensing, Reserved Instances, Savings Plans) and automated provisioning with Terraform, ARM, PowerShell and Azure Policy.

Badger Holdings

System & Network Engineer, insurance and financial-services group

- ◆ Ran server infrastructure across three locations on VMware ESXi and vCenter with SAN storage, specified new server hardware, and led the group's cloud-first move to Azure and Microsoft 365.
- ◆ Migrated on-premises Exchange to Exchange Online for a business handling hundreds of thousands of emails a day, over limited bandwidth; moved licensing to Microsoft 365 E3 per user; ran Mimecast for filtering, archiving, DR and awareness training.
- ◆ Designed MPLS networking across eight sites, later replaced with SD-WAN. Twice received the Badger Dazzle Award for IT (2017, 2018).

2014 – 2021
Alongside work

Taccor Gaming

Founder and Managing Director

- ◆ Founded and ran an eSports organisation, including its online game servers, sponsorships, suppliers and recruitment.

Skills

Architecture	TOGAF, Technical Design Authority, HLD/LLD, design assurance, standard patterns, roadmaps, build/buy/integrate assessment, Lucid, Confluence
Integration and APIs	Workato iPaaS and API Platform, layered API-led design, common data model, REST, Microsoft Graph, OAuth 2.0, SAML/OIDC SSO, SCIM, webhooks, Azure API Management
Business applications	Dynamics 365 Sales and Customer Service, Business Central, Power Platform (model-driven apps, Power Automate, Dataverse), DealHub CPQ, BillingPlatform, Cloudmore, HubSpot, Kantata
Data	Azure Databricks, medallion architecture, Genie, Databricks Apps, Data Factory, ADLS Gen2, data quality
AI and agents	Copilot Studio, Workato Genie, Azure AI Foundry, Claude Code, ChatGPT Codex, GitHub Copilot, AI governance, human-in-the-loop agent design
Cloud and infrastructure	Azure IaaS/PaaS, AKS/Kubernetes, Entra ID, landing zones, networking, FinOps, VMware ESXi/vCenter, SAN storage, Exchange Online, Mimecast
DevOps	Azure DevOps, Git, Terraform, ARM, PowerShell, CI/CD

Certifications

The Open Group, 2026

TOGAF® Enterprise Architecture Practitioner
Applied TOGAF® EA Practitioner
TOGAF® EA Foundation

Microsoft

Azure Solutions Architect Expert
Azure Security Engineer Associate
Azure Cosmos DB Developer Specialty
Microsoft 365 Enterprise Administrator Expert

Workato

Enterprise Automation Certification
Automation Pro I, II and III

Outside work

I run a home lab covering IoT, 3D printing and custom circuit boards. AI coding agents raise the pull requests, I review before anything merges, and a pipeline deploys to the lab: a weather station, inventory and budget tracking, and custom Docker networking that ties it together. Away from the screen I'm usually building something at home, out hiking, or with my family.