

EXPERIENCE

Salesforce

San Francisco, CA

Global Distribution Strategy & Operations - Senior Manager, Strategic Initiatives October 2020 to Present

- Proactively identify opportunities for technology investments to support operations, estimating impact to operating margin, scope, level of effort, and dependencies. Communicate use cases and value to garner stakeholder buy-in and organizational alignment. Illustrate options to approach technology objectives.
- Leveraged HR data to automate dashboard security permissions and Salesforce permission sets, reducing case load of access requests by ~500 per year and ensuring access is removed promptly.
- Design and update security models, dashboards, and metrics for annual GTM planning. Collaborate with cross-functional teams to update existing processes, identify critical changes to system data and functionality, and ensure timely execution. Manage expectations around risk, scale, data quality and operational impacts.
- Engage executive stakeholders, managers and end-users to define, ratify and revisit technical requirements and business processes to ensure feasibility, execution, reportability, and organizational commitment.
- Architect, launch, support, improve and integrate technology and programs to scale operations, automate business processes, and track success metrics. Ensure data accuracy and operational continuity around field activity to support strategic planning, financial modeling, compensation and hiring.

Success Strategy & Operations - Senior Architect / Internal Product Manager June 2018 to October 2020

- Program development and management of global GTM strategic initiatives impacting 4000+ Sales, Success and Professional Services resources covering over 90,000 implementations at customers with licensing spend between \$600K and \$25M+.
- Architecture, wireframes, requirements and maintenance for systems supporting global Sales, Professional Services, and Success Managers, including ownership of business release management including QA, UAT and production deployment.
- Program enablement via business process support, operational reporting, data driven product recommendations, community engagement, and training with global webinars, decks and video distribution.

Customer Success Group - Senior Internal Product Manager

January 2014 to June 2018

- Partner with engineers, scrum teams and other IT resources to implement technical solutions with use cases, product requirements (PRDs), and prototyping in dev environments.
- Managerial dashboard development, operational and compensation metric reporting to drive behavior, and leadership analytic tools focused on regional coverage, KPIs, at-risk Accounts and employee performance.
- Design and support technology and programs that drive and track how Success Managers engage with customers by understanding their product usage, strategic goals, KPIs and market conditions.
- Drive business processes by working with Regional Sales, Service and Success Leads to enhance customer relationships and gather data, providing quarterly completion of >97% and actionable analysis of field data.

21Tech Consulting

San Francisco, CA

Senior Enterprise Implementation Consultant - Sr. Project Manager - Sr. Analyst July 2007 to January 2014

- Led implementation team on \$7M+ project, managing 6 technical and business resources to deliver process improvement, configuration, architecture, prototypes, data migration and systems integration.
- Senior Consultant on \$2M+ implementation projects delivering integrated enterprise systems in partnership with Engineering, using as-is/to-be business process reengineering, business and technical requirements, user interface wireframes, configuration specifications, QA, UAT and production deploys.
- Bridged communication between technical, management, business interests, clients and end users. Managed organizational expectations for lead time, budget, and changing requirements.
- Leveraged GAP/data analysis, JAD workshops, site observations, interviews, focus groups, prototyping and proof of concept installs to ratify business process requirements across client organizations.
- Collaborated with Sales to bid with vendors including IBM, Oracle, Infor, Microsoft and OpenText.
- Built legacy integration ETLs with scheduled batch files, SQL queries and stored procedures.

NYC311 - New York City Department of Internet Technology and Telecom
Senior Business Analyst, Project Analyst – Agency Liaison

New York, NY
September 2005 to July 2007

- Single liaison between NYC's citizen service call center and 4 major city agencies among others.
- Designed, implemented, and adjusted business processes and content governing call handling.
- Designed and launched web based scheduling application integrated to AS400 legacy system to reduce Call Taker error and web-enable process to allow for self service. Reduced call volume by >100%.
- Business owner of Siebel CRM functional and content requirements affecting 500 users handling 50,000+ calls daily including UAT, change management, and training, and quality assurance of operational output.
- Analysis of data from call center and legacy applications to identify problems and opportunities for improvement. Managed 2 analysts for policy research, running reports, and QA analysis.

New York City Department of Health and Mental Hygiene
CRM Application Manager

New York, NY
December 2003 to September 2005

- Grew opt-in email distribution lists from <1K to over 100K recipients using multiple marketing strategies, strictly observing the CAN-SPAM act, in support of digital distribution of periodicals.
- Streamlined periodical fulfillment by improving data formatting and delivery to fulfillment vendor, ensuring accurate, regularly updated recipient lists for periodicals with over 30K recipients and direct mail campaigns.
- Project management and product management of enterprise wide CRM system including development specifications, database administration, user training and support, and managing data entry staff.
- Data acquisition, cleaning, duplicate removal and maintenance policy. Transformed and incorporated data from multiple sources including purchased direct marketing data, NY State databases and internal records.
- Refined and prioritized development requirements by analyzing system data, user feedback from several departments, and UAT to ensure usable design, useful and accessible data, and user buy-in.

EDUCATION

William E. Simon Graduate School of Business Administration
Master of Business Administration

University of Rochester, NY

- Concentrations: Computers and Information Systems, Electronic Commerce, Competitive Strategy
- Simon School Merit Based Scholarship Recipient and Consortium for Graduate Study in Management Fellow

Oberlin College and Oberlin Conservatory of Music
Bachelor of Arts. Major: Sociology with Honors

Oberlin, OH

- Thesis: Convergence of Mass Communication Technology's Impact on Societal Norms

SERVICE

405 Shrader / Ars Urbis
Recording Engineer and Producer

San Francisco, CA

- Recording and production of chamber music performances at non-profit venue

Bike MS - National Multiple Sclerosis Society of Northern California
Top 150 Fundraiser

San Francisco, CA

- Raised over \$10K for National MS Society via Bike MS fundraising campaigns

CERTIFICATIONS

- Salesforce Certified Administrator
- Salesforce Certified Advanced Administrator
- Salesforce Certified Sales Cloud Consultant
- Salesforce Certified Service Cloud Consultant
- Salesforce Certified Marketing Cloud Consultant