# PROFESSIONAL SUMMARY

Results-driven sales cycle focused leader with 10+ years' experience in supply chain and customer service environments. Proven success in implementing cost savings initiatives, coordinating and maintaining tight schedules and deadlines, and ensuring internal and external customer-centric satisfaction. A track record for identifying logistical improvements, developing processes to streamline operations to align with company goals and objectives. Top-performer, respected leader and mentor, and valuable contributor to local communities.

# SYSTEMS KNOWLEDGE

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| --- | --- | --- |
| * MS SQL & SSRS * Tableau * VB.NET * ASP.NET * AJAX | * Project Management * Product Management * Business OperationsDevelopment * Remote Team Management * Data Analytics | * Cross-Functional Leadership * Situational Leadership * Emotional Intelligence * Strategic Planning |

# PROFESSIONAL EXPERIENCE

**MSA Systems, Inc. - QStock Inventory Division** - San Jose, CA (Remote) 1/2019 – Present

***Supply Chain Solution Architect***

Reporting to the Director of Sales and Marketing, I am responsible for managing customer's needs in discovery, showcasing a solution through demos, and scoping the implementation for professional services. My Operations background made me a perfect fit to build out training courses for a new partner program.

* Standardize inbound frameworks, intake experience, and implementation protocols to increase customer experience and decrease friction for the QuickBooks and Sage Intacct integrations.
* Co-create a "partner program" and training to amplify sales channels and deal flow. We brought six partners to Level 2, two partners to Level 3 for enterprise SaaS sales, and one partner to white-label implementation status.
* Developed and executed a redesign of MSA's three websites to create a unique, cohesive customer experience, leveraging the branded platform for all sales assets.
* Create a dataflow diagram and video examples of current architecture to head migration from Windows Mobile to Android Platform.
* Maintain a customer-focused Epic to develop sales wants and needs for a SaaS application and Android application.

**INK YOUR DREAMS** - Murrieta, CA 4/2016 – Present

<https://www.inkyourdreams.com/meincceo/>

***Sr. Coach: Leadership, Cost Reduction, Marketing***

Coaching clients to realize their potential and level up their businesses and their lives through personal development and internet marketing strategies. Leveraging in-depth industry best practices in sales, product-line launch, and system implementation to coach startups and small businesses to build-out their online marketing strategy and sales processes.

* Co-created nine-week Me, Inc.CEO training course, coaching individuals on becoming the CEO of Me, Inc., to accelerate their careers and level-up those around them.
* Developed Tactical Reading: a coaching program established on proven success factors of "How To Read a Book In An Hour," enhancing A-Players' ability to fast track their careers.
* Developed the Task Assassin productivity course for top performers by optimizing their day with clarity and focus.
* Designed, come to market strategies for digital products, including planning and creating websites, sales funnels, and ads to fast track the sales process.
* Development of Client Content to include: articles, email campaigns, landing pages, ads, webinars, and sales videos for the following clients: Intuit, Sage Intacct, and Warehouse Anywhere.

**AMERICAN SPECIALTY HEALTH** - San Diego, CA (Partial Remote) 8/2017 – 12/2018

***Manager, Reports Specialist***

Reported to the Director of Business Intelligence on all activities of reporting. Organized, prioritized, and assigned projects to managed teams and delivered results through business goals alignment and process improvement.

* Evaluated operations of existing reports and procedures and implemented waste reduction process to align with business goals.
* Streamlined report request process by implementing CRM focusing on a Single Source of Truth methodology, increased Case throughput 76% over six months.
* Reduced Quarterly Reporting timeliness 22%, improvements up to 3 weeks, in a 60-day cycle by utilizing Agile best practices.
* Validated the results of existing reports quarterly to determine the viability of information against data sources.
* Identified process improvement opportunities and execute process improvement endeavors using a combination of Value Proposition Design and Lean Six Sigma.
* Coached and lead the team through the Accountability Roadmap. Curating daily priorities, maintaining a backlog, trained on Objectives and Key Results (OKRs) to support the company's strategic goals.

**SUNRUN -** Murrieta, CA 2/2017 – 8/2017

***Account Executive, Sales***

Account Executive for Sunrun, one of the market leaders and pioneers in the solar field. Partnered with Regional Sales Manager to roll out enhancements on sales reports, managed teams, and projects in the information field.

* Conducted analysis of customer's current and projected electrical usage and financial ROI, generated project proposals and quotes for customers, and presented and finalized solar agreements.
* Managed project on open accounts to ensure accurate and timely progression.
* Created Salesforce reports to mine past leads and created sales from Closed/Lost deals.
* Developed and customize Salesforce reports for Sales Manager.
* Beta tested for new functionality development and Google Suite rollout plan, including supporting the development team by creating instructional videos for new features.

**VIVINT SOLAR -** Murrieta, CA 7/2016 – 2/2017

***Energy Sales Consultant***

Pursued a position within the solar industry to gain deeper insights into sales, customer service, and supply chain operations.

* Met with customers to identify needs, provided in detail various programs, and architected their solar solutions.
* Maintained customer account fact sheets for implemented and non-implemented services.
* Coordinated with site surveyors and installation crews on the scheduling of appointments.
* Managed open account projects to ensure accurate and timely implementation.

**MSA Systems, Inc. - QStock Inventory Division** - San Jose, CA (Remote) 6/2013 - 4/2016

***QStock Product Manager***

Inititionally brought on as an Engineer to support Warehouse Management Systems and Project Manager on Implementations. Within two months took over an on-premise WMS for SMB to build out the department and convert to a SaaS application.

* Launched go-to-market plans, collaborated with all departments to execute and rebrand, resulting in tripled website traffic.
* Ensured the timely, accurate, and cost-effective completion of all implementations following established procedures and timelines, which reduced implementation from months to two weeks for multiple customers.
* Managed full project life cycle of implementations, from initiation at the sale to implementation, crafting requirements and specifications, defining scope and schedule, obtaining approvals, managing tasks, leveling resources, and troubleshooting Interface with senior stakeholders, owners, partners, and external customers across the organization.
* Lead product demonstrations and technical training for customers and partners via webinars, stage presentations, and in-office lunch and learns.
* Re-built the sales cycle from product showcase to creating a compelling story to engage and excite the customer, including a discovery call followed by a proof of concept product demonstration.
* Managed the product line life-cycle, including strategic planning tactical activities for QStock, an inventory management system built for product-based businesses operating on QuickBooks or Intacct.
* Conducted in-person technical training for customers, new project managers. Created an online training website for both customers and a new partner onboarding program that aligned all onboarding staff into a consistent operation group.
* Oversaw and maintained technologies to safeguard functionality and maximum visitor's benefit.
* Developed and revised website and social media to optimize search engines and increased visitor participation.
* Educated customers on effective content management throughout the sales process and provided a thorough analysis of websites, blogs, videos, and social media for consistency.
* Developed training, on-going educational meetings, and one-on-one time to ensure staff were providing courteous and accurate information to their customers.

# VOLUNTEER

**TEDxTemecula -** Temecula, CA 6/2015 – Present

<https://www.tedxtemecula.com/team.html>

***Director of Events***

Joined as a volunteer with TEDxTemecula to foster and develop community innovation and personal growth. Over the past five years, I have had the gratification to increase community awareness, growing event attendance from 80 attendees to selling out venues at 365 people. As the Event Director, I have increased sponsorships, created a VIP level, and enriched audience engagement.

* Manage speaker applications, auditions, and selections.
* Support speakers with coaching before the event, ensuring speakers selected are prepared to present their TEDx Talk.
* Coordinate with Volunteer Coordinator on all day-of tasks to ensure a seamless experience for guests and speakers.
* Created a VIP experience to cultivate a deeper connection between audience members and speakers, leading to increased event ticket sales.
* Collaborate with TEDx stakeholders to create a unique entry experience each year for guests.
* Boost energy levels and encourage relationship building between guests before the doors open to promote a feeling of togetherness.
* Work within constraints of limited budgets to create a world-class experience for the audience and speakers.

# EDUCATION & DEVELOPMENT

**Situational Leadership**, Leadership Studies, Inc. 2018

**Emotional Intelligence**, Leadership Studies, Inc. 2017  
**Lean Management**, Simplilearn 2015

**Inbound Marketing Professional**, Hubspot Academy 2010

**Master of Business Administration,** University of Phoenix 2010  
**Bachelor of Science, Information Technology**, University of Phoenix 2002