

Contact

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Top Skills

Apex Programming
Lightning Web Components
Salesforce Flow

Languages

English
Spanish

Certifications

Salesloft Administrator
Salesforce Certified Administrator (SCA)
Salesloft Associate Administrator

Honors-Awards

Relentless Service to the Floor

Drew Lambert

Founder, Revelate Operations | Salesforce Revenue Operations for Series B SaaS (\$10-50M ARR)
Greater Boston

Summary

Independent Salesforce consultant specializing in revenue operations architecture for Series B SaaS companies scaling from \$10-50M ARR. I fix broken systems rather than rebuild them.

-- What I Do --

I help growing SaaS companies modernize their revenue infrastructure without the disruption of a full rebuild. My approach focuses on systematic discovery, cross-functional alignment, and sustainable technical solutions that support scale.

Typical engagements: CRM modernization, complex system integrations (Salesforce-HubSpot-NetSuite), data governance frameworks, automation workflows, and revenue tech stack optimization.

-- Track Record --

7+ years Salesforce experience spanning enterprise implementations, fractional consulting, and full-time leadership roles. 300+ Trailhead badges. Documented client cost savings exceeding \$200K annually through workflow optimization and system consolidation.

Recent client work includes revenue architecture resets for Series B companies, AI transformation projects with AgentForce and Data Cloud, and complex multi-system integrations for companies navigating rapid growth.

-- How I Work --

Engagements range from \$12K-\$70K at \$75-110/hour. I manage 2-3 active projects simultaneously, ensuring deep focus without overextension. My methodology emphasizes stakeholder coordination, comprehensive documentation, and knowledge transfer that enables client teams to maintain systems long-term.

Experience

Revelate Operations, LLC

Founder & Principal Consultant

October 2025 - Present (1 month)

- Founded boutique Salesforce consulting practice specializing in revenue operations for Series B SaaS
- Managing 3 concurrent client engagements: Rockbot (\$30M Series B music/signage), Debticate (AI transformation), 22Q Family Foundation (donation system migration)
- Delivering "brownfield redesigns" that modernize existing systems rather than rebuilding, reducing client costs while maintaining continuity
- Recent implementations: Azure AD SSO, AgentForce AI deployment, AWS Data Cloud integration, Stripe payment processing
- Engagements range \$12K-\$70K with documented client savings exceeding \$200K annually

Bevi

Senior Revenue Systems Engineer

July 2022 - October 2025 (3 years 4 months)

Massachusetts, United States

- Owned Salesforce architecture and revenue operations for \$100M+ Series C smart water company
- Achieved 100% project completion rate across 50+ implementations while reducing backlog 46%
- Drove 66% sales acceleration through CRM modernization and workflow automation
- Engineered HubSpot integration that collapsed lead routing from 2+ hours to 3 minutes
- Led data governance initiative reducing account redundancy 13%, enabling downstream AI/analytics
- Integrated enterprise revenue stack: HubSpot, ZoomInfo, Salesloft, Apollo.io, NetSuite, Zendesk
- Generated \$200K+ in documented annual operational savings

Served as technical architect for Bevi's complete revenue operations infrastructure, bridging sales, customer success, finance, and product teams during critical growth phase. Managed the full Salesforce ecosystem from requirements gathering through deployment and continuous optimization.

Led comprehensive CRM modernization that realigned Salesforce with evolving corporate strategy. Conducted cross-functional discovery sessions to map complex revenue workflows, then translated business requirements into scalable technical solutions. The resulting architecture supported 66% sales growth over 12 months while eliminating manual processes that consumed 15+ hours of sales capacity weekly.

Rebuilt critical connections across the revenue tech stack with a focus on data integrity and process automation. The HubSpot-Salesforce integration redesign eliminated \$40K+ in annual revenue leakage. Automated territory assignment, quote generation, and renewal workflows that reduced quote-to-close cycles. Established data governance frameworks that created clean data foundation for future analytics and AI implementations.

DraftSales

Salesforce Architect

November 2020 - December 2023 (3 years 2 months)

- Delivered Salesforce architecture and implementation services for multiple B2B SaaS clients
- Designed scalable CRM workflows optimizing sales and marketing automation across diverse tech stacks
- Partnered with engineering teams to integrate Salesforce with product backends and marketing platforms
- Led technical training and change management ensuring adoption of new CRM capabilities
- Architected lead management and customer engagement strategies that improved sales-marketing alignment

Provided fractional Salesforce architecture services to growing companies needing enterprise-grade revenue operations without full-time headcount. Worked across multiple client environments simultaneously, translating unique business requirements into technical solutions. Specialized in rapid assessment and implementation of CRM enhancements that delivered immediate productivity gains. Built integrations connecting Salesforce to marketing automation platforms, customer data sources, and sales engagement tools. Developed training materials and documentation that enabled client teams to maintain and evolve systems post-engagement.

Revener

4 years 2 months

Manager of Systems Architecture
January 2022 - July 2022 (7 months)
Lexington, Massachusetts, United States

- Led development and launch of Salesforce AppExchange applications, expanding technical service offerings
- Established strategic partnerships with Salesforce, Salesloft, and ZoomInfo to enhance integration capabilities
- Architected CRM workflows and system infrastructure for Fortune 500 clients
- Designed advanced GTM system architecture and SaaS integrations that drove measurable revenue growth
- Delivered custom sales automation solutions leveraging the full Salesforce ecosystem

Directed technical architecture for enterprise clients during company's scaling phase. Led cross-functional teams in building AppExchange-listed products that solved complex revenue operations challenges. Partnered directly with major technology vendors to develop integration frameworks that became core service differentiators. Translated complex client requirements into scalable technical solutions, focusing on automation, data integrity, and sustainable system design that supported long-term growth objectives.

Sales Operations Manager
March 2019 - January 2022 (2 years 11 months)
Lexington, Massachusetts

- Built scalable operational infrastructure supporting sales team growth and consistent productivity gains
- Designed pipeline management, forecasting, and data governance processes from ground up
- Implemented automation tools and CRM enhancements that improved workflow efficiency across sales org
- Developed standardized reporting systems and KPIs that informed executive strategic decisions
- Led cross-functional collaboration to scale operational strategies company-wide

Established foundational sales operations framework during critical company growth period. Created repeatable processes for pipeline management, territory planning, and quota setting that enabled predictable revenue growth. Introduced automation and workflow optimization that reduced manual administrative tasks, allowing sales team to focus on revenue-generating

activities. Built reporting infrastructure that provided real-time visibility into sales performance, forecast accuracy, and pipeline health.

Senior Business Development Representative

December 2018 - March 2019 (4 months)

Lexington, MA

- Prospected and qualified leads to generate new opportunities for the sales team.
- Contributed to developing outreach strategies and refining pitch materials.
- Maintained a strong focus on meeting and exceeding quarterly targets through consistent performance.

Business Development Representative

June 2018 - December 2018 (7 months)

Lexington, Massachusetts

- Conducted high-volume outreach to engage potential clients and build relationships with prospects.
- Focused on identifying and qualifying sales opportunities to hand off to senior sales representatives.
- Gained foundational experience in sales strategy, lead qualification, and CRM use.

IBM

Senior Business Development Specialist

June 2018 - March 2019 (10 months)

Lexington, Massachusetts

- Conducted high-volume outreach to engage potential clients and build relationships with prospects.
- Focused on identifying and qualifying sales opportunities to hand off to senior sales representatives.
- Gained foundational experience in sales strategy, lead qualification, and CRM use.

Education

University of Massachusetts Lowell

Bachelor of Business Administration (B.B.A.), Marketing and International

Business · (2015 - June 2018)