JEFFREY GARY

CRM Platform Consultant / Business Intelligence Analyst

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📍 Austin, Texas

EXPERIENCE

Analyst
05/2024 - Present
Remote

Kindly Human

- Designed and implemented advanced CRM solutions using data visualization tools such as Tableau and Python libraries (e.g., Matplotlib, Seaborn) to create interactive dashboards and empower data-driven decision-making.
- Developed and deployed dynamic CRM visualizations using JavaScript libraries (e.g., D3.js) to provide actionable insights into data trends, enhancing stakeholder understanding.
- Conducted comprehensive analysis of complex CRM datasets, offering tailored recommendations that optimized business strategies and improved performance metrics.
- Leveraged web scraping and CRM data integration techniques to expand data resources, improving the overall analytical scope.
- Built and maintained custom CRM dashboards and reports, integrating data from SQL databases to streamline communication of key insights across teams.
- Architected revenue operations pipelines within CRM software (HubSpot) to support strategic business objectives.

Data Analyst I Sales & Growth Product Mgt. I Business Process Project Mgt.
05/2023 - Present

Crown Administrators I Business Operations & Data Analyst / CRM Project Mgt.
6/2023-11/2023
Austin, TX

- Enhanced cross-functional operations by leading CRM platform implementations, including sales pipeline automation, data consolidation, and integrations for systems like HubSpot, Pipedrive, and Tableau.
- Collaborated on CRM consolidation projects for four companies totaling $100 million in revenue, improving sales processes and automation workflows for clients such as TruHealth Group, Sedera, and PointHealth.
- Led the end-to-end optimization of deal pipelines in HubSpot, driving enhanced operational efficiency and revenue growth for the TruHealth CRM platform.
- Conducted in-depth business intelligence analysis using Tableau and Looker, synthesizing CRM data to deliver insights that informed actionable recommendations.
- Strategically executed HubSpot Sales Hub CRM migrations, managing seamless transitions from Pipedrive CRM platforms for key stakeholders.
- Partnered with TruHealth executives to restructure CRM workflows, creating tailored dashboards, reports, and training resources to support long-term platform adoption.
- Collaborated directly with the PointHealth CEO to identify emerging CRM technology trends and explore untapped market opportunities for platform development.

Crown Administrators I Business Strategy Analyst Intern
5/2023 - 7/2023
Austin, TX

- Created comprehensive disruption analysis report to identify and evaluate coverage gaps across various states.
- Utilized methodological approach to identify insufficiently represented regions.
- Facilitated targeted intervention opportunities by superimposing cluster maps for more refined data analysis.
- Identified and analyzed industry and geographical trends with business strategy implications.
- Generated standard and custom reports summarizing business, financial, economic and technological systems data using Tableau data visualization for ETL, managers, clients and other stakeholders to review.
- Analyzed CRM systems for Crown, TruHealth and newly acquired Health Tech companies to identify redundancies and develop streamlining recommendations.
- Presented findings and recommendations to ETL using Tableau.

OBJECTIVE

Driven, ambitious, and highly motivated Analyst. Experience in data analysis, visualization, and CRM process improvement, specifically in Implementation, Sales Enablement, and Integration Services. Seeking a challenging role to leverage my skills, coursework and certifications to procure a challenging role with opportunity for growth.

STRENGTHS

🛠 **Work Ethic**
Simultaneously managed 5 projects, in 5 departments, reporting to 4 executives

⚙ **Adaptability & Aptitude**
Unsolicitedly devised, implemented and trained revenue team on new process and dashboard utilization

TOOLS & TECH

SQL · Tableau · Python · JavaScript ·

HubSpot CRM · SalesForce CRM ·

VBA Scripting · Lucidchart ·

MS Office

INDUSTRY EXPERTISE

Rev Analysis & Cycle Mgt

Healthcare Analytics

Healthcare Tech SaaS

CRM Platform Consulting

Data Visualization

Sales Optimization

EXPERIENCE

NCAA Student Athlete
06/2018 - Present

St. Edward's University | Graduate Student
Austin, TX

- Manage a 30+ hour weekly in season workload of performance preparation and delivery at the D2 level while maintaining graduate program academic load. Preparation includes: Synergy sports software data analysis, practices, weight training, studying plays, traveling, entertaining alumni, games and mentoring younger teammates while simultaneously maintaining a full academic course load from 08/2021 to present.

Mercer University | D1 Student Athlete
Macon, GA

- Managed a 45+ hour weekly in season workload of performance preparation and delivery at the D1 level while managing a full time academic load. Preparation includes: Synergy sports software data analyses, practices, weight training, studying plays, entertaining alumni and recruits, games, mentoring younger teammates and liaising with coaches to maximize team synergy and on-court success from 06/2018 to 05/2021.
- Project Manager/Lead for Entrepreneurship Practicum Project.

Social Media Marketing Intern - Care H2O
06/2023 - 11/2023

Care h2o
Colorado Springs

- Analyzed, composed and distributed social media content for health and wellness infused water provider.
- Increased number of followers by 3,000% (from 426 to 14,087) resulting in a 56% increase in sales.

EDUCATION & CERTIFICATIONS

Data Analytics & Visualization Program
08/2024 - 02/2025

Vanderbilt University

M.S. Digital Marketing and Analytics
07/2024

St. Edwards University

B.A. Business Administration Management
05/2023

St. Edwards University

B.A. International Business
06/2018 - 05/2021

Mercer University

CERTIFICATIONS

Google Data Analytics: Professional

Google Project Management: Specialization

HubSpot Reporting

HubSpot Revenue Operations Software

HubSpot Sales Software

HubSpot Marketing Software

HubSpot Inbound Marketing

Salesforce Certified Associate

Timing you Zaps - Zapier

Formatter - Zapier

Filters and Paths - Zapier

Building Workflows - Zapier

Automate Getting new Leads in Pipeline - Zapier

Generative AI Fundamentals

Google Analytics Certification - Skillshop

Pipedrive Masterclass CRM

LinkedIn Lucidchart