

KATHERINE ANDERSON TREADWELL

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<https://katreadwell.github.io/KATportfolioV2/>

Salesforce Certifications

Administrator, Advanced Administrator, Community Cloud Consultant, Field Service Lightning Consultant, Pardot Consultant, Pardot Specialist, Sales Cloud Consultant, Service Cloud Consultant, Platform App Builder.

Salesforce Implementations

Sales Cloud: 3 full lifecycle implementations with migration of legacy data from homegrown CRM.

Service Cloud (including FSL): 2 full lifecycle implementations, 1 implementation of FSL.

Pardot: migration from Marketo and full lifecycle implementation

FinancialForce: Professional Services Automation, Billing Central, and Accounting Fundamentals modules implementations with assistance from implementation partners.

INTER-CON SECURITY SYSTEMS, INC.

APRIL 2019 - PRESENT

Inter-Con Security is one of the largest, privately held security companies in the United States and employs thousands of guards globally with clients spanning federal and local agencies as well as utility and commercial clients.

DIRECTOR OF SYSTEMS

Report to the CIO and Serve as System Administrator and Product Owner of Salesforce CRM Enterprise edition and Financial Force on the Lightning Platform. Manage all systems implementations, integrations, and data migrations from legacy systems.

- Responsible for all implementations, integrations, and data migrations for Inter-Con's proprietary workforce management solution including: Salesforce Field Service Lightning (scheduling system), Paycom (payroll and human resources technology provider), Inter-Con's proprietary mobile app hosted on AWS, and enterprise solutions such as Office 365, Jira, and RingCentral.
- Enhance and maintain a robust Salesforce instance which serves as the "source of truth" for each business unit: Accounting (GL, Payables, Billing), Payroll (health and welfare benefits, holidays, pay rates), HR (PTO and sick plans, disciplinary actions, absence requests), Operations (case management, employee scheduling, incident reporting), and Business Development (sales and marketing).
- Administer the Financial Force solution and oversaw implementation of Accounting Fundamentals and Billing Central modules as well as data migration from legacy system (Great Plains).
- Architect and co-ordinate phased roll out of a highly customized instance of Salesforce's FSL solution as well as design and conduct training sessions for users. Gather and implement user feedback to improve the solution iteratively, debug problem reports, and log feature requests.
- Ensure consistent tracking and reporting of employee time from mobile app (AWS) to field service (Salesforce) to billing (FinancialForce) to payroll (Paycom) as well as accommodate user-driven ad-hoc corrections and changes.
- Use agile project management to gather requirements from internal stakeholders and business users.
- Perform majority of declarative functions and manage consultants when programmatic solutions are needed.
- Anticipate data limitations and plan regular exports to a data lake and subsequent data purge.

SAVIYNT

SEPTEMBER 2018 – APRIL 2019

Saviynt is an enterprise, cloud solution that provides comprehensive data access governance and administration across various applications resulting in improved internal compliance and security.

DIRECTOR OF SALES OPERATIONS

Reported directly to the COO of Saviynt and was responsible for supporting the global sales team (direct and channel sales), managing sales-related operations including purchase and administration of technical solutions, and acted as the System Administrator of the company's Salesforce CRM Enterprise instance and Pardot instance.

- Designed and implemented end-to-end Lead tracking system from initial interaction with Prospect to Lead conversion to Opportunity generation. By properly identifying Lead origin and Campaign attribution within the marketing ecosystem and providing enhanced Lead tracking throughout the sales funnel, Management was able to determine which marketing activities provided the most ROI and which sales campaigns yielded results.
- Instituted a lead-registration system on Partner Portal (hosted on Salesforce's Community Cloud) to mitigate channel conflicts between direct sales and partner sales.
- Provided sales support to Saviynt's Global Field Sales team, resellers and systems integrators such as EY and Deloitte, and technical partners AWS and Microsoft.

PARASOFT CORPORATION

DECEMBER 2010 – AUGUST 2018

Parasoft Corporation develops software solutions that assist organizations to automate testing and to deliver error-free software.

DIRECTOR OF GLOBAL SALES OPERATIONS

MAY 2017 – AUGUST 2018

Managed a team of 5 employees and reported directly to the owner and CEO. My responsibilities included supporting the global sales team, managing sales-related operations including the purchase, administration, and implementation of technical solutions, managing the global renewals team, managing Parasoft's Continuous Education program, and managing channel sales in Latin America. I also served as the System Administrator of our Salesforce.com CRM instance.

Sales Operations:

- Supported sales in the Americas, EMEA, and APAC regions to assign quota, territory, and named accounts to sales representatives and design comprehensive compensation plans to drive new business and achieve company objectives.
- Ran and analyzed reports against Salesforce.com CRM to determine product sales, KPIs, performance, and lead generation to gain insight into the pipeline and uncover opportunities and increase sales velocity.
- Assisted Field Sales with pricing and licensing of Parasoft's software suite; attended sales meetings with customers when needed and interfaced with Legal to ensure that appropriate contracts were drafted.
- Assisted Accounting with monthly reconciliation for wholly owned subsidiaries and foreign distributors as well as secure difficult collections. Provided revenue recognition data to the CFO as well as customized reports regarding expenses and outstanding liabilities.
- Calculated monthly commissions for all Field Sales staff and ensured orders booked were in good standing.
- Partnered with and assisted Marketing, Development, Finance, Product Management, Human Resources, Customer Support, and, of course, Sales to achieve company goals.

Salesforce System Administrator for Enterprise edition:

- Administrator for 155 global internal users and several thousand Community users.
- Successfully migrated organization from Classic to Lightning edition.
- Salesforce Dashboard & Reports guru: provided analytical data to the Executive Team regarding Sales and Pipeline Analytics: by Product/Region/Industry/Partner, past performance vs. current performance, win/loss rate, and sales representative performance against quota. Also provided analytics regarding product sales and customer retention.
- Administrative duties included: adding new users to the system, role and profile maintenance, feature requests, security, forecasting, leads management, and customizing objects for enhanced reporting metrics.
- Integrated 3rd party applications such as Mavenlink, DiscoverOrg, Concur, LinkedIn Navigator, FinancialForce PSA, HubSpot, and GetFeedback.

Continuous Education:

Designed, managed, and implemented Parasoft's Learning Management System, hosted on Absorb. Assisted the Continuous Education Manager in gathering and uploading product-related and sales-related materials for internal consumption and ensured that team members successfully passed required product knowledge exams. Adapted and monetized existing internal courses for consumption by customers.

Latin America Channels Manager:

Supported distributors in Latin America as well as managed direct sales. Duties included forecast reviews, signing new distributors, pricing and positioning assistance, meeting with customers and prospects, and arranging for technical support. Through process improvement and product education, channel sales increased by 150% year over year.

GLOBAL SALES OPERATIONS MANAGER

JAN 2014 - MAY 2017

- Migrated all sales data from home-grown CRM (25yrs historical data) to Salesforce.com CRM in less than 6 months. Designed page layouts, added custom objects, and wrote workflows to automate clerical work, reduce errors, and increase data integrity. Customized and localized our Salesforce.com CRM to support multi-currencies and locales.
- Designed and maintained our Customer Portal, hosted on the *force.com* platform, using Salesforce.com Communities.
- Supported global direct sales network as well as distributors in North America, Europe, and Asia.

GLOBAL RETENTION MANAGER

DEC 2010 - DEC 2013

- Maintained annual software renewals at 90%+ retention for global install base.
- Administered and tracked physical licensing of product.

TD AMERITRADE, INC.

MARCH 2007 – APRIL 2010

INVESTMENT CONSULTANT

Using a consultative sales approach, sold financial products and assisted clients with their investments and asset protection:

- Achieved top 20 placement in 2009 for most sales in Fixed Income (exceeded quota by 200%), assets referred to Registered Investment Advisors (exceeded quota by 500%+), and Gross Assets aggregated.
- Met with a wide range of clients and businesses with simple to complex needs; worked on financial plans with assets ranging from \$100,000 to \$30,000,000+.

ADECCO DIRECT PLACEMENT

JUNE 2006 – MARCH 2007

EXECUTIVE RECRUITER

Permanent / direct-hire recruiter for the world's largest staffing agency:

- Provided superior customer service to all national accounts, including TD Ameritrade.

EXPEDITORS INTERNATIONAL OF WASHINGTON, INC.

AUGUST 2003 – APRIL 2006

VENDOR RECONCILIATION AGENT

Acted as lead vendor reconciliation agent for over 150 vendor accounts for international freight forwarder:

- Arranged meetings with vendors to ensure accurate and timely billing of services and established best billing practices.

EDUCATION

UCLA EXTENSION: Coding Bootcamp

JULY 2020

UCLA EXTENSION: Professional Designation in International Trade and Commerce

2005

UNIVERSITY OF CALIFORNIA, LOS ANGELES

2002

Bachelor of Arts – East Asian Studies with a Concentration in Chinese and Japanese