

# Revenue Operations Portfolio

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## Overview

I began in sales and transitioned into Revenue Operations by repeatedly identifying structural friction inside our sales organization and building systems to fix it.

Without a formal engineering background, I independently designed and implemented governance frameworks, workflow automations, reporting infrastructure, and data cleanup initiatives. For more technical builds, I leveraged ChatGPT to help generate logic and structure, then personally implemented, tested, and iterated until production-ready.

My work spans:

- Sales process governance
- Workflow automation (Salesforce + Sheets)
- CRM data integrity
- Performance reporting systems
- Cross-functional execution with Sales, Marketing, IT, and HR

## 1. Revenue Performance Infrastructure Redesign

### Problem

Performance tracking relied on manual inputs with inconsistent definitions and limited executive visibility.

### Action

Redesigned reporting architecture. Standardized quota definitions, aligned Salesforce data integrity with IT, and built a structured reporting system using Supabase with manager input workflows and executive dashboards.

### Impact

Created a trusted single source of truth for performance reporting. Reduced manual overhead and supported sustained quota attainment between 98%–124%, including 124% after a 40% increase.

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## 2. CRM Data Enrichment Initiative (~9,000 Accounts)

### Problem

Missing and inconsistent firmographic data reduced segmentation accuracy and reporting reliability.

### Action

Exported, normalized, and mapped account data by ID. Coordinated structured re-import to preserve integrity and eliminate duplication.

### Impact

Improved targeting precision, segmentation clarity, and CRM data confidence across revenue teams.

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### 3. SDR Governance & Rules of Engagement

#### **Problem**

Unclear ownership across leads and accounts caused rep conflict and inconsistent outreach.

#### **Action**

Designed and implemented formal Rules of Engagement and accountability frameworks in partnership with leadership and HR.

#### **Impact**

Reduced ownership disputes and established enforceable governance standards.

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### 4. Cross-Sell Outreach Governance System

#### **Problem**

No structured ownership model for cross-product outreach, creating duplicate contact risk.

#### **Action**

Built a centralized allocation and routing system with product segmentation and rep-level controls.

#### **Impact**

Eliminated duplicate outreach and formalized cross-sell governance.

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### 5. Salesforce Workflow Automation – Demo Capture

#### **Problem**

Manual demo data entry created reporting gaps and inconsistent attribution.

#### **Action**

Implemented Record-Triggered Flows to auto-populate required fields upon demo booking.

#### **Impact**

Improved data accuracy and eliminated manual process dependency.

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### 6. Real-Time Demo Booking Notifications

#### **Problem**

Leadership lacked immediate visibility into booked demos.

#### **Action**

Built event-triggered automation scoped to specific record types to send real-time notifications while preventing noise.

#### **Impact**

Improved operational visibility and reduced manual monitoring.