

David Dugan

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EDUCATION

Simon Fraser University

Bachelor of Arts in Economics

Burnaby, BC

August 2018 – June 2021

Santa Barbara City College

Associate of Arts in Film Production

Santa Barbara, CA

August 2015 – May 2018

EXPERIENCE

Junior Service Operations Coordinator

FISPAN

February 2024 – Present

Vancouver, BC

- FISPAN enables banks to deliver embedded financial products and seamless banking connections to corporate clients through its ERP plugin, partnering with 11 top U.S. banks—including J.P. Morgan Chase—with combined assets exceeding \$3T.
- Designed and implemented a Client Journey Tracker in JIRA, aggregating data from Zendesk and Calendly via Make.com, to monitor client onboarding progress, aiding in forecasting live dates, pipeline entries, and time estimates for each onboarding step.
- Developed an automation workflow using webhooks to connect Zendesk, Make.com, and Slack, reducing SLA breaches by over 11% in 2 months through dynamic alerts to managers when tickets approach SLA limits.
- Designed and implemented an automated access request process for FISPAN's Zendesk instance through the Zendesk API and Make.com, reducing wait times from nearly one month to one business day and enhancing security by restricting access to authorized users only.
- Created a script to automatically assign onboarding agents to clients requesting Sandbox environment setups for the FISPAN plugin, optimizing assignments based on onboarder availability and workload data from Google Calendar.

Business Operations Lead & Head of Automation

The Data Storytellers

April 2023 – September 2023

Vancouver, BC

- Elevated daily cold email outreach from 60 to 200 and initiated a new marketing channel that delivered 12,000 emails in one day.
- Managed several website migrations while maintaining 100% uptime and resolving critical email issues through DNS management.
- Organized and facilitated a masterclass for 50 data analytics executives from Fortune 500 companies, reinforcing The Data Storytellers' reputation as a leader in B2B executive education.
- Deployed AI technologies for innovative solutions in cold outreach and content production, setting a new standard for company-wide productivity and innovation.

Game Master

i-Exit Escape Rooms

August 2021 – April 2023

Vancouver, BC

- Improved player experience and customer service by briefing teams on game rules and handling phone, email, and in-person inquiries, contributing to smooth gameplay and elevated customer satisfaction.
- Coordinated bookings through Bookeo to manage daily scheduling, contributing to efficient and well-organized operations.
- Increased game engagement by monitoring real-time gameplay and offering strategic hints, guiding teams to successful game completion.

Media Intern

Random Beauty, Inc.

April 2017 – January 2018

Santa Barbara, CA

- Edited weekly hour-long webinars discussing homeopathic subjects into dozens of small videos, sorted by subject, to be uploaded to a Vimeo channel and shown to members as educational content.

Customer Experience Representative

Indigo Books and Music

October 2017 – December 2017

North Vancouver, BC

- Received and shelved incoming merchandise after store closing, leading to higher effectiveness during store hours for the holiday season.
- Managed and organized back stock to prevent over-shelving on the displays and encourage effective restocking.

- Monitored each item to confirm that it could be sold on the floor in order to prevent fines and potential lawsuits from authors.
- Confirmed the price on every item and labeled those that had no price to prevent confusion and inconvenience for the customers.

Delivery Driver

September 2016 – July 2017

SB Menus

Santa Barbara, CA

- Supported customer satisfaction by effectively using the Driver mobile app for real-time order updates, enabling prompt customer communication and on-time food deliveries.

CERTIFICATIONS

Make.com Partner | *Level 5 - Expert*

October 2024

- Learned to solve complex problems in Make, including handling inconsistent inputs, error logging through the Make API, and working with incomplete APIs.
- Exhibited mastery of low-code data manipulation by completion of a practical assessment.

Make.com Partner | *Level 4 - Advanced*

April 2024

- Mastered advanced techniques in Make, including complex IF formulas, advanced error handling, and the use of webhooks for sophisticated integrations, ensuring robust and dynamic automation workflows.
- Proficiently managed data structures, arrays, and pagination challenges using advanced scenario design patterns and tools like the Repeater, enhancing data manipulation and processing capabilities.
- Demonstrated practical expertise by building a comprehensive solution to solve a complex problem, validated through hands-on challenges and achieving a high theoretical test score.

PSM 1 | *Professional Scrum Master I*

August 2023

- Demonstrated an understanding of Scrum as described in the Scrum Guide and how to apply Scrum in teams.
- Validated knowledge of the Scrum framework, the Scrum Master accountabilities and how to apply Scrum.

HubSpot Software | *Sales, Marketing, Email Marketing*

June 2023

- Demonstrated proficiency in HubSpot Sales Software, including expertise in inbound methodology, lead identification, contact engagement, and sales closing strategies.
- Comprehensive skills in creating inbound marketing strategies, managing buyer personas, contact segmentation, and campaign creation, along with expertise in designing and optimizing high-performing emails, ensuring deliverability, and employing analytics for effective engagement and lead nurturing.

Google Analytics | *Universal Analytics, Google Analytics 4*

January 2024

- Adept at leveraging advanced tracking, reporting, and analytics tools to derive actionable insights and optimize website performance.
- Exhibited ability to utilize GA4's enhanced capabilities for cross-platform tracking, predictive analysis, and data visualization to inform strategic decision-making and improve user engagement metrics.

Google Data Analytics Specialization

July 2022

- Competent in data analytics tools including spreadsheets, SQL, Tableau, and R, with expertise in preparing, processing, analyzing, and sharing data for strategic decision-making.

SKILLS AND INTERESTS

Skills: Make.com, n8n, low-code development, business process automation, Zendesk, JIRA, Calendly, Cal.com, Python, HTML/CSS, SQL, R, Tableau, Zapier, Feathery, LinkedIn Sales Navigator, Google Analytics, Adobe Creative Cloud, HubSpot, Pipedrive, Notion, Google Workspace, Microsoft 365/Office, RocketReach, Slack, Typeform, Ring.io, domain name system (DNS), project management, agile methodologies, A/B testing, data analysis, customer service, video editing, content creation

Interests: AI technologies, soccer, hiking, running, rhythm games, photography, chess