Patrick Carter   *Senior Sales Systems Analyst @ Datadog*

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📍 15 Acorn Circle, Bridgewater, MA   🔗 My Personal Website
in LinkedIn Profile   ⊙ GitHub Profile

🪪 PROFILE

As a Salesforce professional with more than 5 years of leadership experience and just as many years of Salesforce experience, I have primarily focused on Quote to Cash processes within the SaaS industry. My expertise lies in utilizing tools such as Salesforce and Python to drive automation, which has resulted in significant operational efficiencies. I have managed a team situated all over the world, which has given me a global perspective when it comes to process optimization. My commitment to continuous learning is evident in my hands-on approach to rollout coordination and adaptability to new tools and applications. Additionally, I have received four separate Salesforce certifications. My strong work ethic and detail-oriented approach have been recognized, and I am passionate about driving process improvement, ensuring seamless cross-departmental collaboration, and delivering unparalleled value to stakeholders. My track record in enhancing operational efficiencies and my proactive approach to challenges make me a valuable asset to any forward-thinking organization.

🗃 CERTIFICATES

Salesforce Certified JavaScript Developer I ⧉
Salesforce

Salesforce Certified Platform App Builder
Salesforce

Salesforce Certified Platform Developer I
Salesforce

Salesforce Certified Administrator
Salesforce

Complete Web Developer in 2023: Zero to Mastery ⧉
Zero To Mastery Academy

The Complete Salesforce Development Course ⧉
Udemy

Complete Python Developer in 2021: Zero to Mastery ⧉
Udemy

The Modern Python 3 Bootcamp ⧉
Udemy

💼 PROFESSIONAL EXPERIENCE

Datadog

Senior Sales Systems Analyst   Apr 2024 – present
                                                              Boston, MA
- 4x Salesforce Certified Admin/Developer
- Part of the CPQ team at Datadog responsible for updating and maintaining Product Rules, Approval Rules, Pricing Rules, as well as product configurations.
- Leverages Apex and Salesforce Flow Builder to build out complex business automations.
- Develop and maintain custom Lightning Web Components.

Manager, Order Operations   Jun 2021 – Mar 2024
                                                              Boston, MA
- Manages a team of 8 across Boston, New York, Dublin and Singapore that on average processes over 2,000 orders per month.
- Utilizes Salesforce Reporting and Dashboarding daily to ensure we are meeting all SLA's within a given month and quarter.
- Assists in building out complex business automation within Salesforce using Process Builder, Flow Builder, APEX and writing custom Lightning Web Components.
  - Has independently worked on and released some of these automations myself.
- Works cross-departmentally and meets regularly with Engineering, Finance, Go To Market, Deal Desk and Commission teams to review upcoming changes as well as areas of improvement.
- Responsible for upholding certain SOX compliance steps as it pertains to the deal review process.
- Working with Engineering PM's on overlapping projects and offer valuable insight to ensure success of rollouts.
- Meeting with Sales and CS leaders to review pain points and coordinate plans to improve processes.
- Wrote a Python script which communicates with Salesforce and alleviates some of the manual aspects of Opportunity review for the team to use.

Team Lead, Order Operations   Nov 2020 – Jun 2021
                                                              Boston, MA
- Brought on to assist the Order Operations team scale and ensure all processes are being adhered to while also trying to identify inefficiencies and implement long term solutions.
- Managed a team of 3 analysts across Boston and Dublin.
- Responsible for reviewing all large Enterprise deals to ensure accuracy of pricing, compliance with internal policies, as well as deal structure and flagged to necessary teams downstream.
- Worked with our Sales Systems team to implement Salesforce enhancements which lowered the chance of error and increased efficiencies.
- Responsible for sending out legal documents and customer specific Order Forms for signature using DocuSign.
- Responsible for existing contract changes requested by Sales and Customer Success.
- Held training sessions on a monthly basis on best practices around deal closing and Salesforce cleanliness.

- Worked within AWS, Azure, GCP Private Offer portals for customers who wanted to buy Datadog through an external marketplace.

Granite Telecommunications, LLC

Senior Offer Management Supervisor

Apr 2019 – Nov 2020
Quincy, MA

- Oversaw team of 12 analysts who handle entirety of quoting responsibilities while monitoring and maintaining accuracy
- Able to manage and distribute workload evenly across team while handling any escalations with management.
- Brought in to help lead a marketing initiative requested by CEO to revamp all customer facing documents.
- Was heavily involved with integrating automated quoting process within Salesforce CPQ.
- Works cross departmentally to ensure accuracy of cost and revenue information as well as new company wide initiatives.
- Trusted to handle most reporting which includes weekly report of workload and efficiency numbers as well monthly/quarterly report which is used to assist in personnel decisions as well as areas of focus
- Trusted to respond to and investigate inquiries which involve high priority customers.
- Assists in training internal operations teams as well as sales staff when new releases within Salesforce get released as they pertain to CPQ.
- Two direct reports ended up moving into full time CPQ Analyst roles where they're sole responsibility was the upkeep of Salesforce CPQ as well as building out new features.

Cost Analysis and Savings Supervisor

Jun 2017 – Apr 2019
Quincy, MA

- Oversaw a team of 10 analysts who were responsible for all proposal quoting within the broader team
- Able to manage and distribute workload evenly across team while handling any escalations with management.
- Was responsible for dealing directly with upper management daily, resolving credit requests/inquiries, and ensuring all company and team procedures are followed accordingly
- Works cross departmentally to ensure accuracy of cost and revenue information as well as new company wide initiatives
- Was trusted to handle most reporting which includes weekly report of workload and efficiency numbers as well monthly/quarterly report which is used to assist in personnel decisions as well as areas of focus.
- Assists in training internal operations teams as well as sales staff when new releases within Salesforce get released as they pertain to CPQ.

Senior Cost Analysis and Savings Analyst

Apr 2017 – Jun 2017
Quincy, MA

- Took on additional responsibilities while also completing normal Cost Analysis and Savings duties with no loss of efficiency
- Oversaw queue for West Palm Beach and Orlando branches while delegating requests to different Cost Analysis and Savings analysts.
- Established self as direct source of contact for questions, concerns and quick turnaround times from sales representatives.
- Experience working directly with customers.
- Responsible for weekly and monthly reporting to upper management.

Cost Analysis and Savings Analyst

Feb 2016 – Apr 2017
Quincy, MA

- Analyzed invoices for potential customers and put together savings reports based on their current Telecom spend
- Dealt directly with Florida sales branches who consistently lead company in contributor of requests (volume and size)
- Assisted in resolution of daily disputes and helped answered all Premier, Sales and customer inquiries
- Led multiple high priority requests that CEO was directly involved with as well as customer visits
- Internal Employee of the Month, 7/12/16, due to taking on extra responsibilities such as updating team trackers as well as helping to train new hires

🎓 EDUCATION

Marist College, B.A. Mathematics

2011 – 2015
Poughkeepsie, NY

🧠 SKILLS

Salesforce
Process Builder, Flow Builder, CPQ
Salesforce Billing, APEX, Lightning Web
Components

Data Visualization
Salesforce Dashboards/Reports

Python Programming Language
Automation of tasks

Web Development
HTML, CSS, Javascript, ReactJS

Querying Languages
SQL, SOQL

⚜ AWARDS

Department Wide Employee of the Month, Granite Telecommunications, LLC   Jul 2018
Due to outstanding achievement and work put into Salesforce and Salesforce CPQ rollouts, won a
trip to Miami to receive the award alongside members of other departments.