

ANDREA TAI

Experience

Restaurant365

Deal Desk Specialist

August 2023 - Present

Irvine, CA

- Manage customer contracts and data in Salesforce, Workfront, Intacct, Monday.com, and other systems as needed
- Lead product specific segments as point-of-contact for sales and significantly reduced deals corrections rate
- Work cross-functionally to approve sales quotes, orders, amendments, and contract renewals using Salesforce
- Support all commercial related activities including, but not limited to, deal structuring, contract creation, pricing, review, and approval for offers, contract management and providing support to field sales for quoting
- Assist Sales teams in creating and positioning complex orders, which involves acting as the liaison between Sales and other key stakeholders involved in the deal structuring process
- Onboard and mentor new Deal Desk team members, as well as conducted and evaluated candidate interviews
- Manage pipeline integrity/accuracy, review CPQ cleanup dashboard regularly, and provide CPQ reporting

Adobe

Deal Desk Analyst

April 2022 - August 2023

San Jose, CA

- Led Frame.io's Deal Desk team to close over \$5M in deals per quarter
- Managed day-to-day deal approval process, meet with sales teams, communicate via documented business cases with cross-functional stakeholders to articulate the deal value in a consistent manner
- Responsible for adherence to and compliance with policy and procedures
- Communicated with sales teams to ensure consistent application of process and policy
- Onboarded and mentored new Deal Desk team members
- Responsible for drafting and certifying customer contracts with Sales, Sales Operations, Revenue Assurance, Credit, Legal, Order Management, Finance, and other business functions

LinkedIn

Deal Desk Strategist

Nov 2021 - Apr 2022

Sunnyvale, CA

- Generated and analyzed sales reports that provide insights into improvement opportunities for sales
- Educated sales representatives on processes and best practices to improve performance
- Built working relationships cross-functionally that will help resolve special requests from clients/sales

Conga

Deal Desk Analyst

San Mateo, CA

Aug 2021 - Nov 2021

- Managed enterprise renewal deals Close Order process end to end on Salesforce
- Provided Sales Operations leadership, support, and training to the sales organization
- Provided operational support to the sales team including territory and pipeline management
- Worked cross-functionally with Legal and Finance on closed order compliance and revenue

Education

Santa Clara University

Bachelor of Arts in Communication, Minor in Information Systems and Analytics, Minor in Economics

Dec 2020

Skills and Interests

Languages English (Native), Mandarin (Native), Taiwanese (Native), Spanish (Intermediate)

Technical Adobe Photoshop Adobe InDesign Windows Word PowerPoint Android Salesforce.com
Adobe Lightroom Adobe Illustrator macOS Excel OneNote iOS Entomo
Hootsuite CSS HTML SEO Google Analytics Final Cut Pro

Non-Technical Sales Operations Management Event Planning Marketing Social Network Team Leadership Project Management