Patrick Carter *Manager, Order Operations @ Datadog*

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🏹 https://pat-carter-personal-portfolio.vercel.app

🪪 PROFILE

I am a manager in the SaaS space with over 5 years of experience specializing in Quote to Cash processes. I believe communication and detail orientation are key and have developed those skills throughout my career. I have an extremely strong work ethic and readiness to learn new tools/applications as shown by relevant rollout coordination. I have a strong commitment to process improvement and automation. Willing to always go the extra mile to ensure I am providing as much value as absolutely possible.

🧠 SKILLS

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

Python Programming Language (Automation of tasks) | **Querying Languages** (SQL, SOQL)

Data Visualization (Salesforce Dashboards/Reports) | **Web Development** (HTML, CSS, Javascript, ReactJS)

💼 PROFESSIONAL EXPERIENCE

Datadog

Manager, Order Operations	Jun 2021 – present Boston, MA

- Manages a team of 7 analysts across Boston, New York, Dublin and Singapore.
- 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 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

🏅 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.

🗂 CERTIFICATES

The Complete Salesforce Development Course ⬀   **Complete Python Developer in 2021: Zero to Mastery** ⬀
Udemy   Udemy

The Modern Python 3 Bootcamp ⬀
Udemy