

# Patrick Carter *Manager, Order Operations*

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## 👤 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)

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

**Data Visualization** (Salesforce Dashboards/Reports)

## 📁 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 and Flow Builder.
  - 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**   
Udemy

**Complete Python Developer in 2021: Zero to Mastery**   
Udemy

**The Modern Python 3 Bootcamp**   
Udemy