

Heather Martinez

hmartinez@coloradomesa.edu | Grand Junction, Colorado | linkedin.com/in/heatherlietz

Director, Customer Operations | Culture Engagement Advocate | Sales Ops Trailblazer

Versatile, accomplished professional who provides broad operational and developmental insight across all organizational departments. **Extremely organized, self-directed, and productive** with robust project management, process improvement, data analysis, and prioritization skills. Versed in all levels of project planning, change management, implementation, training, adoption, and launch. Listens to feedback and thrives on understanding underlying problems to craft creative solutions to complex challenges by innovative thinking. **Proven Leader** focused on global organizational value drivers and revenue growth generation to achieve outstanding results. **Articulate and engaging leader** who creates a positive impression of company culture through energy, urgency, and collaboration focused on an enhanced work experience with a fun, lively ethos. **Exceptional communicator** comfortable in any environment with a passion for the human element. Provides extreme attention to detail, focused on education and knowledge. **Valued as a trusted key contributor and solutions provider** with extraordinary dedication in exceeding organization and client expectations.

- B2B Business Development, Strategy
- Market Penetration, Pricing, Analysis
- Budget/Forecast, P&L Management
- Project, Product Management
- Regulatory Compliance, ISO Standards
- Pricing Infrastructure Creation
- EBITDA, Revenue & Profit Growth
- Vendor, Account, Asset Management
- Cross-functional, Staff Management
- Value driver & creation identification
- Price Negotiation & Governance
- Global Sales Op's Education & Training
- Change Management Implementation
- Salesforce.com Admin Org Leader
- Business Process Standardization

Experience | Accomplishments

Colorado Mesa University– *Grand Junction, Co*
Adjunct Professor | Davis School of Business

Spring 2022 to Present

By celebrating exceptional teaching, academic excellence, scholarly and creative activities, and by encouraging diversity, critical thinking, and social responsibility, CMU advances the common good of Colorado and beyond.

- Adjunct lecture professor for the Davis School of Business. Lecturing undergraduate students BUGB 101 Introduction to Business & BUGB 440 Business Ethics

Farmers Insurance– *Grand Junction, Co*
Agency Owner | Community Advocate

2022 to Present

Providing a quality insurance product at a reasonable price. We have an unwavering commitment to uphold our founding ideals to provide industry-leading products and first-rate services to the customers we're privileged to serve.

- My husband and I purchased an established Farmers Insurance agency that has been a trusted business, long standing in the Grand Junction community
- Providing life, health, property, and casualty insurance to the Grand Junction Community, while focusing on educating our clientele on the types of insurance they need to protect their families and businesses.
- Protecting you and your family so you can focus on achieving your dreams. – *The Martinez Agency*

Boyd Corporation– *One Company, Many Solutions, Pleasanton, CA*
Director of Customer Operations

2021 to 2022

Boyd Corporation is a global leader in environmental sealing & thermal management solutions critical to products that keep the world running. Boyd Corp employs over 10k + employees across the globe, touting 50 locations in the USA, Europe, and APAC.

- Collaborate with Sales, Operations, and Marketing teams to maximize revenues and customer loyalty by ensuring revenue retention to forecast customer lifetime value.

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- Monitor business and process metrics to measure and manage customer service effectiveness. Review and approve the staffing structure and workload of each location considering the needs of the customer base and order entry processes.
- Active involvement in and ownership to achieve a world-class Customer Support Operation and improve service levels through consistent processes that drive efficiency and productivity.
- Identify and/or develop an order entry standardized platform with IT. Continuously monitor resource requirements for customer support and identify tools for greater efficiency and accuracy.
- Develop and deliver ongoing training for the team to continuously upgrade the customer experience. Monitor NPS and develop solutions to increase customer satisfaction.
- Support the creation of an industry-leading support and success operation team by taking a more data driven approach to solving for the customer experience through partnering with both data science and product teams.
- Be the worldwide go-to person for all customer operations inclusive of onboarding, training, customer management, and support.
- Partner and influence key stakeholders on business decisions, partnering with product operations and business intelligence teams.
- Own all the stages of change management from ideation through execution, owning and implementing the Kotter's Change Management framework and process.
- Leverage balance between business and technical analytical skills to identify areas of opportunity for programming and process improvement.
- Maintain the roadmap of Customer Success & Experience initiatives, leveraging strong collaboration, prioritization, and project management skills. Drive actionable outcomes by clearly communicating findings to a mix of technical and non-technical stakeholders.

Boyd Corporation– *One Company, Many Solutions, Pleasanton, CA*

2018 to 2021

Customer Operations Manager | Pricing Director | Instructional Designer

- Co-chair McKinsey & Company consulting project where Dynamic Deal Scoring & Value Based Pricing is implemented globally across our organization with an estimated ROI of **\$30M**.
- Maintain ever-evolving market dominate strategies for our many customer industries and technical custom product solutions. Created a Pricing Excellence Strategy to include market strategy intelligence, perceived customer value, transactional analysis, and pricing infrastructure governance to help determine the “right” price and the “best” price.
- Focus on innovative ways to implement **value creation** by training the global sales team (~325 team members) on pricing effectiveness, negotiations, and operational improvements to eliminate waste and overspending. Provide insight and pricing strategy suggestions for specific customer accounts with LTA and Give-back agreements, especially those which might be underperforming. Travelled to 20 global sites to onboard and train our global sales team, including sites in APAC, EU & NA.
- Define process and resources in the development of the CHAID tree and DDS process tools. Growing the data model and providing maintenance based on unique attributes that effect pricing for individualized deals, as well as financial and operational adjustments that might come into play. Provide feedback to sales team on their personal pricing strategies with their specific customers; how to combat margin leakage all with the goal of achieving the best price possible.
- A key member of our Sales Operations M&A team where pricing is analysed and implement into our 100-day onboarding plan.
- Managed a team of 6 Pricing Analysts globally that includes unique pricing strategies of standard book pricing, e-store, and custom engineered product solutions (build to print).

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- Pricing strategy project with a budgeted revenue increase **\$14M globally** for 2020 and 2021 annually.
- Successfully launched customized Demand Forecasting software. Forecasting models include cyclical, run rates, cost downs or LTA agreements, rebate programs, US government contracts, specific part lead times, etc. Trained ~325 global sales team members to use the software for monthly, quarterly, and annual budgets & forecasting exercises.

Boyd Corporation– *Portland, OR*

2015 to 2018

Salesforce.com Admin | Data Integrity Specialist | Instructional Designer

- Assessed and streamlined multiple workflow process using Salesforce.com, enabling the sales team's increased efficiency to maximize a user-friendly experience.
- Successfully coded multiple (12) ERP systems information to be accessible within Salesforce.com resulting in a centralized data base accessibility for our executive team.
- Revolutionized pipeline reporting feature to be on demand for sales users and executives alike, to provide a live view of Boyd Corp's status in all sales opportunities, translating into succinct presentations to our stakeholders.
- Managed 3rd party implementation teams to ensure data accuracy and convertibility from all connected API's and APEX callouts reducing redundancy for operations and procedures at Boyd.
- Streamlined a pricing initiative project from multiple business units to be visualized in Salesforce resulting in capturing over **\$12M** of increased revenue in two years.
- *Duties:* Solely responsible for implementing and creating apps, writing visual force, developing objects, fields, reports & dashboards, and fostering growth within the org as Boyd Corp's global footprint grows through M&A or organic activity. Develop all training documents, videos, 1:1 sessions, webinars and facilitate live, weekly "office hours" calls for all users. Maintain an org with **275 + internal users**; assign and create roles and permissions. Provide daily maintenance of the system including neglected opportunities, opportunity win validation, de-duping contacts & accounts, and data integrity across the full org.
- *Key projects:* Implementation of Partner & Customer Community, global customized quoting app with imbedded pricing intelligence algorithm, Internal Boyd Training app, Quality Control app, Service Cloud, EPM data links with specific dimensions, attributes, and hierarchical structure. Created a complex approval process to follow Boyd's delegation of authority for pricing approvals.

Avidex Industries – *Innovative Leaders in A/V Solutions, Bellevue, WA*

2013 to 2015

Support Services Supervisor | Technical Contract Sales | Business Development

Avidex Industries specializes in the design, installation, integration, and technical support of audio/visual equipment.

- Provided technical sales of warranty/support agreements and maintenance packages for audio/video equipment. Achieved an annual revenue of more than **\$1M**.
- Implementation of client-facing procedures and processes within the Support Services Group with daily team, national branches, and client interaction. Assisted with launch of new service software (SaaS) as a key contributor.
- Supervise all members of the Support Services Team, reporting to the branch manager. Assist in business development within Support Services, Sales, Engineering, and Installation departments.

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Education | Volunteer Work

COLORADO MESA UNIVERSITY – Business Lecturer & Adjunct Professor, 2022

WILLAMETTE UNIVERSITY – Executive Master of Business Administration, MBA, 2019

COLORADO STATE UNIVERSITY – BS in Non-Profit Organization Management, Accounting minor, 2015

UNIVERSITY OF CAMBRIDGE - International Studies Program

DENVER MUSEUM OF NATURE AND SCIENCE – Volunteer and Educator for 10+ years

CO-FOUNDER OF S.O.S (SAVE OUR SCHOOLS) – Non-profit organization founded in 1999