

# PHILLIP MARTIN

Revenue Operations | GTM Systems | AI Automation

Flagstaff, AZ | 541-430-3026 | Phillip.martin7@gmail.com

## PROFESSIONAL SUMMARY

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Revenue operations and sales technology leader with 20+ years across field sales, training, CRM rollout, Sales Operations, and AI workflow design. Helps sales teams use better systems, cleaner data, and clearer processes. Often works between leadership, Sales Operations, Product, Data, Training, and the field - turning business needs into tools and workflows people will actually use.

## CORE COMPETENCIES

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Revenue Operations; GTM systems; Salesforce CRM; HubSpot CRM; AI workflow design; Prompt standards; Sales process rollout; Field enablement; CRM data quality; Manager dashboards; Training programs; Sales playbooks; Cross-functional project delivery; Lead and relationship tracking

## SELECTED HIGHLIGHTS

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**Salesforce Rollout & Sales Process.** Led rollout, training, and long-term support for Salesforce and a standardized sales process across a \$2B division. Helped sales teams and managers use the same stages, dashboards, and routines to manage pipeline and field execution.

**AI Workflow Adoption.** Helped bring AI into daily sales workflows by creating prompt standards, testing use cases, gathering field feedback, and turning that feedback into practical tools for reps and managers.

**Q Stories CRM Build Project.** Built a working HubSpot CRM from scratch as a solo builder for a small media production studio. Used historical Gmail relationship data to pull contacts, companies, notes, and potential opportunities out of old email threads, clean the data, remove duplicates, and turn it into a usable CRM.

## PROFESSIONAL EXPERIENCE

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### First American Title

*National title and settlement services company supporting a large field sales organization.*

### Senior Business Analyst, AI Strategy & Enablement | 2025-Present

- Lead AI workflow design across Sales Operations, Product, Data, Training, and field teams.
- Define requirements, guardrails, and success measures for new AI and Salesforce-connected workflows.
- Help move AI and Salesforce projects from discovery to launch by connecting business needs with technical teams.
- Test practical AI use cases for meeting prep, follow-up, prioritization, retention, manager visibility, and day-to-day sales execution.
- Turn field feedback into simpler workflows, clearer handoffs, and better tools for reps and managers.

### Principal Sales Technology Trainer / Sales Execution | 2021-2024

- Led in-person rollout of Salesforce and a standardized sales process across the sales channel.
- Built playbooks, training, templates, and support materials that helped reps use Salesforce in their daily work.
- Worked with managers and regional leaders to reinforce adoption after rollout and help the process stick.
- Translated field pain points into clearer requirements for Salesforce, BI tools, reporting, and internal technology teams.
- Created and scaled the Sales Technology Center, a Salesforce training and field support hub that generated 250K visits.

### Sales Representative, Field Sales | 2019-2021 | Portland, OR

- Managed a Portland sales territory, working closely with real estate agents, escrow teams, and title teams to grow local business.
- Built firsthand knowledge of how field sales teams work, what gets in their way, and what kind of tools they will actually use.
- Carried that field experience into later work in Sales Operations, Salesforce adoption, training, and AI workflow design.

## EARLIER EXPERIENCE

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### Loan Officer, Low VA Rates | 2015-2018

Closed \$100M+ in residential loan volume.

### Regional Sales Lead, Tesla / SolarCity | 2013-2015

Supported sales execution, coaching, and field growth during SolarCity's early-stage growth period before its acquisition by Tesla.

### Sales Executive, Cox Communications | 2010-2013

Sold telecom services in the Las Vegas market and managed prospecting, pipeline, and quota execution.

### Sales Mentor, Dell Inc. | 2003-2006

Player-coach role responsible for quota performance, team support, and rep coaching.