

PHILLIP MARTIN

Revenue Operations & Sales Technology Leader

Flagstaff, AZ | 541-430-3026 | hello@phillipjmartin.com | phillipjmartin.com

PROFESSIONAL SUMMARY

Revenue operations and sales technology leader with 20+ years across Dell, Tesla and First American Title, spanning frontline sales, CRM, enablement, process transformation, and enterprise systems.

Recently helped scale Salesforce and a standardized sales model to 500 sellers across 30 states, led field execution of a \$1M national sales transformation, and helped secure a \$3.1M annual Agentforce investment. I work across sales, product, data, and technology to turn business problems into scalable GTM workflows that improve adoption, ramp time, productivity, and execution.

CORE EXPERTISE

Revenue Operations · Sales Enablement · GTM Strategy · Salesforce · HubSpot · CRM Adoption · Sales Process · Workflow Design · Seller Readiness · Manager Coaching · Business Analysis · AI Enablement

SELECTED IMPACT

\$1M national transformation: Led a nine-month Salesforce and sales-process rollout across a \$2B division, reaching 500 sellers and 46 leaders in 30 states.

Ramp + Adoption: Redesigned onboarding, workflows and manager coaching to accelerate new-seller ramp from six months to as little as one.

\$3.1M Agentforce investment: Built the business case with Product, Sales and executive leadership, then owned requirements and early testing for five use cases launched in 30 markets.

250,000+ site visits: Built a national Salesforce support center and personally coached hundreds of sellers and leaders across the country.

PROFESSIONAL EXPERIENCE

PJM Revenue Systems

Founder & Principal Consultant | May 2026-Present

- Advise several founders and growth leaders on CRM, sales process, reporting, enablement, workflow design, and practical uses of AI for GTM.
- Review how teams, workflows, data, and systems work end to end; identify friction, root causes, priorities, and next steps.
- Build and rebuild CRM and workflow infrastructure, including a HubSpot environment created from years of historical relationship data.

First American Title

Senior Business Analyst, AI Strategy & Enablement | Oct 2025-May 2026

- Partnered with Product, Sales, and senior leadership to define the need and business value for Agentforce, helping secure approval for a \$3.1M annual enterprise investment.
- Owned requirements gathering and early test cases after approval, translating seller and manager pain points into AI workflows for meeting prep, follow-up, prioritization, CRM updates, retention, and manager insight.
- Requirements supported five production use cases launched in eight weeks, targeting 30%-40% rep productivity improvement.

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PROFESSIONAL EXPERIENCE (CONTINUED)

First American Title

Principal Sales Technology Trainer | 2021-2025

- Led field execution of a \$1M, nine-month national sales transformation, delivering roughly 30 live sessions and ultimately reaching 500 sellers, 40 managers, and 6 directors across 30 states.
- Personally coached hundreds of sellers and leaders; helped redesign onboarding, workflows, and manager coaching that reduced new-hire ramp from roughly six months to as little as one.
- Built the Sales Technology Center into a national self-service Salesforce and enablement platform with 250,000+ visits.
- Aligned Sales, Operations, Product, Data, BI, Training, and Technology teams coast to coast around a common operating model.

Business Development Executive, Field Sales | 2019-2021 | Portland, OR

- Managed a Portland sales territory across real estate, escrow, and title relationships.
- Built firsthand experience with seller workflow, customer follow-up, pipeline discipline, and relationship-based growth, then brought that field perspective into CRM, process, training, reporting, and adoption work at national scale.

EARLIER EXPERIENCE

Loan Officer, Low VA Rates | 2015-2018

- Closed more than \$100M in residential loan volume.

Regional Sales Lead, Tesla / SolarCity | 2013-2015

- Coached sales teams and supported hyper growth GTM work.
- 6th sales hire during rapid scaling period, pre IPO, pre Tesla acquisition - saw team expand to 250+ sellers at exit.

Sales Executive, Cox Communications | 2010-2013

- B2B sales, pipeline development, and account growth; worked directly with business customers on needs, solutions, follow-up, and long-term account development.

Sales Mentor, Dell Inc. | 2003-2006

- Sales, rep coaching, and team development; early experience helping sellers improve execution while carrying frontline sales responsibilities.

TECHNOLOGY & INDUSTRY EXPERIENCE

Platforms: Salesforce · Agentforce · HubSpot · Reporting and BI tools · Sales enablement platforms

Methods: GTM planning · Requirements gathering · Process mapping · Workflow design · Training · Manager coaching · Change and adoption

Industries: Title insurance · Real estate · Mortgage · B2B technology and services

Related work: phillipjmartin.com/first-american-salesforce-case-study