

Jayce Rowe

Director of Sales Operations, FX Sales Strategy

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STRENGTHS

- 🏗️ **Pipeline Governance**
Rebuilt stages, routing, exit criteria, and required fields in HubSpot. Leaders gained cleaner inspection and forecast conversations.
- ♥️ **Commercial Analysis**
Studied conversion, velocity, win rates, retention, and productivity. Findings shaped coverage decisions and practical manager actions.
- 👥 **Team Development**
Managed analysts, managers, and new hires through clear plans and coaching. Colleagues gained support without losing ownership.
- 🗣️ **Cross Functional Influence**
Connected field feedback with Product, Marketing, Pricing, and Finance. Shared evidence helped teams make more grounded decisions.
- 🎓 **Enablement Delivery**
Created onboarding, methodology training, plays, and collateral routines. New sellers received a clearer path through early ramp.

SKILLS

<u>Sales Operations</u>	
<u>Revenue Operations</u>	<u>FX Payments</u>
<u>HubSpot CRM</u>	
<u>Pipeline Governance</u>	<u>Forecasting</u>
<u>Target Setting</u>	<u>Commission Design</u>
<u>Sales Reporting</u>	<u>Seller Productivity</u>
<u>ICP Refinement</u>	<u>Sales Enablement</u>
<u>New Hire Ramp</u>	<u>CRM Adoption</u>
<u>Voice of Customer</u>	

SUMMARY

Sales Operations and **Revenue Operations** leader with 12 years of experience building commercial operating systems across **FX payments** and cross border financial services. Leads **pipeline governance**, target setting, commission design, HubSpot CRM optimization, forecasting, **seller productivity** analysis, account handoffs, retention, and sales enablement. Has built practical standards that give regional leaders dependable visibility from lead qualification through customer retention. Recruits, coaches, and develops operations teams while partnering with Sales, Account Management, Marketing, Product, Pricing, Finance, and senior revenue leaders. Uses conversion, win rate, velocity, quota, ramp, and retention data to diagnose performance constraints, refine ideal customer coverage, and guide go to market decisions. Brings sound judgment, clear communication, and steady execution in high growth environments where structure must support revenue growth.

EXPERIENCE

Senior Director, Sales Operations

MeridianFX Solutions 📅 January 2023 - Present 📍 Charlotte, NC

Leads **Sales Operations** for North American FX payments across new business and Account Management. Owns funnel governance, planning, commissions, enablement, CRM discipline, and voice of customer work while guiding regional leaders and partnering with Revenue Operations, Marketing, Product, and Pricing.

- Unified FX funnel governance across regional sellers, improving inspection consistency for sales leadership.
- Rebuilt HubSpot stages, routing, exit criteria, and required fields for dependable forecast calls.
- Established **target setting** using capacity, conversion, **retention**, and productivity data for clearer planning.
- Redesigned commission controls with auditable calculations and structured exception review for Finance partners.
- Built onboarding, **sales methodology** training, plays, and manager reinforcement for repeatable **new hire ramp**.
- Created **voice of customer** reviews linking seller themes with Product, Marketing, and Pricing decisions.

Director, Revenue Operations

Atlas Cross Border Payments 📅 March 2020 - December 2022 📍 Atlanta, GA

Directed **Revenue Operations** for an FX and international payments business, aligning reporting, **forecasting**, CRM governance, and account lifecycle processes. Managed operations leaders and analysts while translating funnel and retention evidence into coverage priorities, adoption programs, and commercial decisions.

- Introduced recurring reviews for coverage, velocity, conversion, **win rates**, quota, and productivity.
- Refined **ICP** segments through conversion, progression, and retention analysis for sharper **prospect coverage**.
- Standardized qualification, routing, seller handoff, and post sale transitions across customer lifecycle teams.
- Led HubSpot adoption through role based training, dashboards, data controls, and manager inspection.
- Managed operations analysts and managers with development plans that expanded analytical capacity.
- Aligned regional leaders around forecast evidence and follow through actions during recurring business reviews.

Senior Sales Operations Manager

Harborline Global Payments 📅 June 2017 - February 2020 📍 Tampa, FL

LANGUAGES



MY CAREER



- Senior Director, Sales Operations at MeridianFX Solutions (3.7 Years)
- Director, Revenue Operations at Atlas Cross Border Payments (2.8 Years)
- Senior Sales Operations Manager at Harborline Global Payments (2.7 Years)
- Sales Operations Manager at SummitRemit Financial (2.8 Years)
- Sales Operations Analyst at BluePeak Currency Services (2.1 Years)

Owned planning and operational analysis for FX payment products serving business clients with recurring international transfer needs. Connected pipeline reporting, commission controls, onboarding, funnel diagnosis, and collateral coordination with Sales, Finance, Marketing, and Product.

- Built reporting connecting stage movement, conversion, **win rates**, capacity, and quota performance.
- Developed commission reconciliation controls with Finance, clarifying payout questions for sellers and managers.
- Analyzed funnel leakage by segment and cohort, shaping **coaching** and sales play updates.
- Created **onboarding** sessions covering CRM workflows, opportunity hygiene, positioning, and **sales methodology**.
- Partnered with **Marketing** and **Product** on collateral shaped by recurring FX buyer questions.
- Prepared monthly leadership reviews that exposed stalled opportunities and practical follow through actions.

Sales Operations Manager

SummitRemit Financial 📅 August 2014 - May 2017 📍 Nashville, TN

Managed core **Sales Operations** for a growing **cross border payments** team, supporting territory planning, CRM administration, pipeline reporting, target planning, seller onboarding, and customer continuity after initial sale.

- Defined opportunity stages and data standards for consistent visibility into active FX opportunities.
- Produced conversion, aging, win rate, and quota analyses that focused leadership attention.
- Supported target and incentive planning with historical performance, capacity, and funnel evidence.
- Built onboarding guides and CRM training for qualification, routing, updates, and account handoffs.
- Coordinated retention reporting with **Account Management** for clearer customer continuity after close.
- Documented planning assumptions so leaders could review capacity and coverage decisions with confidence.

Sales Operations Analyst

BluePeak Currency Services 📅 June 2012 - July 2014 📍 Raleigh, NC

Supported **Sales Operations** for business FX and international payment services through CRM administration, recurring reporting, pipeline analysis, commission inputs, data standards, onboarding materials, and structured field feedback for commercial leaders.

- Analyzed lead progression and conversion by source and segment for sharper prospecting priorities.
- Reconciled seller activity, closed business, and incentive inputs before commission processing.
- Resolved duplicate and incomplete records affecting pipeline and customer reporting quality.
- Prepared onboarding materials covering CRM navigation, stages, reporting, and core **sales** processes.
- Consolidated client objections and product needs into structured summaries for partner teams.
- Supported pipeline reviews with current data, clear exceptions, and concise leadership materials.

PROJECTS

HubSpot Funnel Governance Program 📅 2023

Reworked stage architecture, routing, exit criteria, and required data fields for shared Sales and Account Management inspection. The program gave leaders a consistent view of pipeline quality and forecast evidence.

Commercial Enablement and Ramp Framework 📅 2023

Built onboarding, methodology training, sales plays, and manager reinforcement for new hires. Framework connected CRM habits with practical customer conversations and repeatable ramp support.

Voice of Customer Operating Channel 📅 2022

Created a structured review process for seller and client themes. Findings informed Product, Marketing, Pricing, positioning, and field follow through decisions.

LEADERSHIP & AWARDS

- Revenue Operations Peer Forum, Member and Roundtable Facilitator, 2022 - Present
- Cross Functional Sales Enablement Leadership, recognized for connecting field insight with Product, Marketing, and Pricing decisions
- Regional Sales Planning Leadership, recognized for practical pipeline and target review standards

EDUCATION

Bachelor's Degree in Business Administration

North Carolina State University 🎓 GPA: 3.5 📅 2012 📍 Raleigh, NC

Coursework: Sales operations, business analytics, financial management, marketing, organizational leadership

CERTIFICATIONS

- HubSpot Sales Hub Software Certification 📅 2026
- HubSpot Revenue Operations Certification 📅 2025

TECHNICAL SKILLS

- **CRM Platforms:** HubSpot CRM, HubSpot Sales Hub, HubSpot Revenue Operations
- **Pipeline Analytics:** Pipeline coverage, pipeline velocity, pipeline aging
- **Funnel Measurement:** Stage conversion, win rates, funnel leakage
- **Forecasting Systems:** Forecast calls, forecast reporting, recurring funnel reviews
- **Compensation Systems:** Commission plans, commission calculations, payout reconciliation
- **Sales Planning:** Target setting, territory planning, seller capacity
- **Enablement Programs:** Onboarding, sales methodology, sales plays
- **Data Governance:** Data hygiene, required fields, duplicate resolution
- **Customer Lifecycle:** Lead qualification, account handoff, customer retention
- **Commercial Research:** ICP refinement, prospect coverage, voice of customer
- **Business Reporting:** Quota attainment, rep productivity, executive dashboards

PROFESSIONAL AFFILIATIONS

- Revenue Operations Peer Forum, Member, 2022 - Present
- Revenue Operations Peer Forum, Roundtable Facilitator, 2022 - Present

ADDITIONAL INFORMATION

Work Status : Authorized to work in United States. No sponsorship required.

REFERENCES

AVAILABLE ON REQUEST