

# Jodie Lee

Treasure Island, FL 33706

303.453.9363

[jodayebcmt@gmail.com](mailto:jodayebcmt@gmail.com)

<https://www.jodielee.com>

<https://www.linkedin.com/in/jodieleeenterprises>

Accomplished and enthusiastic **Regional/National/Global Account Manager** with 10+ years of B2C business ownership and devotion to customer acquisition and retention. Instrumental in doubling the customer base of a SaaS startup in 2.5 years, negotiating B2B quotes and contracts with resellers, partners, MSPs, and direct customers.

## SKILLS

- Certified Salesforce Associate: Trailhead Mountaineer with 45 badges
- Proficient with CRMs (Salesforce, Hubspot, Method), Email (Outlook, Front), Canva, Quickbooks, Teams, Calendly, Monday, Gitbook, Microsoft Office (Word, Excel, PPT), Google Suite (Gmail, Docs, Sheets, Slides), Dropbox
- Proactive and responsive to the needs of customers and colleagues
- Experienced leader who can prioritize daily workloads and serve as a team resource

## EXPERIENCE

**Regional Account Manager** — *Meridian Investigative Group*, St. Petersburg, FL (100% Remote with travel to Texas)

10/2023

- Consultative Sales Strategist (Hubspot Inbound Sales Certified): Negotiated B2B quotes for third party insurance agencies, adjusters, public entities, corporations, and law firms, resulting in market expansion, customer base increase throughout Texas, and \$25k YOY growth in 1<sup>st</sup> QTR 2024.
- Account Manager: Supported 1,000 client contacts, managing the full sales cycle – from Awareness to Loyalty – and contacting 50-100 clients daily.
- Case Manager: Documented investigative case intakes, collaborated with internal operations team and insurance adjusters to schedule surveillance, and created daily case updates to report fieldwork results to clients and upsell additional days of surveillance.
- Lead Generator: Warmed new business leads in the pipeline by networking at regional luncheons and meetings and pitching to prospective customers at statewide annual conferences.
- Social Media Marketer: Utilized Canva to publish weekly social media marketing materials to support the email & social media campaigns of 6 senior team members, helping us reach annual company goals for 9% revenue growth.

**Senior Account Executive (Employee #12)** — *Patch My PC*, Castle Rock, CO (100% Remote with occasional travel)

1/2021 – 6/2023

- Consultative SaaS Sales Strategist (Hubspot Inbound Sales Certified): Negotiated B2B quotes and contracts with resellers, partners, MSPs, and direct customers, resulting in market expansion and customer base increase from 2,500 clients to 5,250 clients in 2.5 years

- Account Manager: Responsible for 500 client accounts (including 100 enterprise clients) and managed the full sales cycle, from Awareness to Loyalty. Maintained a 98% close rate, generating over \$5 million in annual sales
- Purchasing Facilitator: Drafted RFPs and RFQs, arranged legal and security reviews with cross-functional teams and completed vendor registration leading up to and through procurement
- Lead Generator: Warmed new business leads in the pipeline by networking at conferences and pitching to prospective customers and took the lead on the application for the GSA Schedule
- Training Coordinator: Published internal documentation and training materials and delivered weekly PPT presentations at sales team meetings to support the growth of 10 junior team members, helping us reach annual company goals for 10% customer acquisition and 95% customer renewal rate

**Founder, Owner, & Massage Therapist** — *Jodie Lee Massage, Inc., RMT#9340, Broomfield, CO*

11/2003 - 8/2020

- B2C Business Developer: Scaled business up to 250 clients in 5 years by B2B networking, prospecting, and sharing referral leads with local health providers, 99% customer retention rate
- Accountant: Performed AR and AP via Quickbooks, filed quarterly corporate taxes, generated reports to forecast sales in the pipeline
- Marketing Manager: Content Creator, Webmaster, SEO Specialist, Social Media Manager
- Account Manager: Utilized cloud-based Massagebook software (SaaS) to manage case histories and insurance claims (auto, medical, and worker's comp) for over 300 accounts.

**Contracts Administrator** — *University of North Carolina: Carolina Population Center, Chapel Hill, North Carolina*

February 2005 - February 2011

- Account Manager: Managed 500 restricted-use data agreements between UNC and other institutions around the world: Negotiation, Approvals, Transfers, Renewals, Updates, Terminations
- Project Manager: Tested biospecimen collection methods in preparation for Wave IV data collection for the [National Longitudinal Study for Adolescent Health \(Add Health\)](#)
- Event Planner: Planned venues and budgets and oversaw meetings with thousands of attendees, such as Add Health National Advisory Committee, Add Health Data Users Conference (held annually at NIH) and 2009 Population Association of America (Detroit)
- Meetings Coordinator: Scheduled and planned all Add Health annual conferences, monthly seminars, weekly staff meetings, and semi-annual committee meetings.
- Biospecimen Coordinator: Created specimen-handling procedures and shipping for archived blood samples from field collection and supervised a staff of 3 assistants
- Grant Coordinator: Assisted with annual center-wide and Add Health-specific progress reports to NIH funders

## EDUCATION

**University of North Carolina at Chapel Hill:** Chapel Hill, NC - *BS Psychology, Chemistry minor*  
Pre-med track

**Boulder College of Massage Therapy:** Boulder, CO - *Massage Therapy Certification*  
Awarded with over 1100 hours of therapeutic massage training

## SIDE HUSTLES, PROJECTS, & HOBBIES

- YouTube Clogging Tutorial: [Learn to clog in 5 minutes](#) – over 400k views 2/2012 to present
  - Member of Apple Chill Cloggers 2003-2010
- [Rocky Mountain Ukulele Orchestra](#), Lakewood, Colorado 1/2017 to 3/2020
  - Orchestra member since 12/2017, Small Group Leader 1/2019 to 3/2020
- [Barista Unfiltered](#) Podcast, Broomfield, Colorado 9/2018 to 1/2021
  - Host, Creator, Interviewer, Scheduler, Publisher
- Rock Choir Colorado, Boulder, Colorado 1/2019 to 3/2022
  - Choir member, performed at Red Rocks, Chautauqua Amphitheatre, Pepsi Center and Carnegie Hall

## VOLUNTEERING

**Treasure Island Hole Patrol:** Volunteer, 2022-current

**Triangle Beagle Rescue:** Volunteer, 2021-current

**Boulder County AIDS Project:** Volunteer, Massage Therapist, Donor: 2017-current