Russell A. Everett

Marketing + CRM Professional Profile

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Competitive by nature with a 'big picture' focus; performance-driven skilled and trusted in building truly collaborative relationships. Prepared to thrive in any fast-paced environment. An experienced sales professional, creative thinker, and synergistic team leader who enjoys winning.

Life

Born and raised in North Texas - hard work, determination, consistency, and personability are a few key pillars that have been instilled in my skillset since the early years.

*"Russell, you better say mam next time" - **Mom***

To be a true Texan, I have understood there are many qualifications over time. If successfully maintaining an organization's data via a CRM such as Salesforce.com and adding value with analytical thinking is one – count me in.

I graduated from The University of North Texas in 2012 with a major in business administration and a minor in mechanical engineering.

GPA – 3.72

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Over the years at diverse organizations I have far better understood the importance and difference working in a collaborative setting as well as working efficiently independently – always leveraging critical thinking and a "nothing is impossible" mindset.

Marketing + CRM Professional

As Salesforce Administrator for Invited, HITRUST Alliance, Frosch, and Brierley & Partners I have been granted the responsibility to effectively process and present all organizational sales data while building the integrity of each Salesforce instance alongside bringing simplicity to the tool for all licensed users. The majority of this communication was projected to various sales teams and managers through interactive dashboards, detailed reporting, all automated as directed. To bridge sales and marketing efforts between departments, I have understood the incredible value and proper utilization of automations between applications and objects to skyrocket growth with far less clicks. A few of the additional platforms I have managed or worked with in some capacity include Pardot, Cvent, WordPress, PowerBI, Docusign, Azure, RemedyForce, Validity, and Jira.

Salesforce Administration

Salesforce.com is not just a program. It is truly a flexible, capable, and extremely powerful CRM that when administered properly, will seamlessly and proficiently drive growth and actionable insights for any organization. **It takes the right knowledge and nurturing to make this work, truly understanding every granular piece of Salesforce's engine.This is what I will ensure with all data under my watch.** Salesforce has been the core driver to my personal business skillset since 2012.

Salesforce Skillset

- Maintained integrity of both sales cloud and marketing cloud instances by utilizing de-duplication methods, third-party applications, Reports, Naming Conventions, and critical daily best practices.
- Regularly met with various teams to develop new processes / objects / applications to build and test in approved sandboxes then work on an approved schedule to migrate agreed upon builds to production and ensure success amongst licensed users in Salesforce.
- Daily monitoring of all corporate email campaigns in Pardot assessing metrics including opens, click-to-open, click-through, unique clicks, delivery, bounce rate, etc.
- Customized page layouts for Leads, Opportunities, Contacts, and - Accounts for greater functionality in reporting in the Sales Cloud. Is the data a user is seeing adding noise or truly actionable?
- Weekly large import tasks performed in both Data Import Wizard and DataLoader.io.
- Consistent collaboration with IT/data teams to ensure proper API pipeline routing and cleansing into CRM and legacy systems
- Experienced in identifying and resolving system-wide concerns while providing insightful feedback, data-driven recommendations, and forecasting support to sales leaders.

Russell's Core Values

-Innovative & adaptable

-Dedicated to absolute integrity

-Focused on the customer first

-Respectful & team oriented

-Optimistic & energizing

-Accountable for performance

-Curious & personable

-Determined to WIN!

IT applications I have managed to drive growth across multiple organizations.

-Salesforce.com
-Pardot
-ServiceNow
-Jira
-Microsoft 365 / Azure
-RemedyForce
-SnapLogic
-Docusign
-Cloudingo
-PowerBI
-Cvent
-Wordpress
-Validity Data Tools
-Einstein Analytics + Activity Capture
-Visio / Miro

Salesforce / IT Process – 1 Example of Solution Designed

Background:

At my recent organization **Invited**, 1 Salesforce sales cloud instance is designed to operate for over 180 clubs across the country, each carrying 3-5 licensed users in diverse roles relative to each club's needs. Our single sales cloud instance is divided primarily by public groups to represent the selling entities (clubs). The primary need for new and existing licensed users is proper capabilities in the tool to sell memberships to customers joining their country club. Within a single month, at various clubs across multiple territories, licensed sellers are leaving and joining these clubs as new employees to sell memberships and effectively build relationships with their customers. It was my team's responsibility to give them the proper access, viewability, editability, and security controls upon their license activation.

Issue:

A handful of corporate associates were provisioning new users in Salesforce without a full understanding of all the necessary pieces required to properly provision (ex: missing a permission set, incorrect public group, incorrect role, or incorrect custom profile). At times, a new or existing user's Salesforce license details were not proper for the new associate to properly access the objects and fields in Salesforce to perform their designated job. This would cause urgent "fire drills" for our team once understood – with the club seller voicing inaccessibility while potentially working directly with a prospect customer at their club location or event.

Salesforce / IT Process – 1 Example of Solution Designed 2022

Solution:

I met with leadership and IT departments at Invited to build, test, and introduce a new automated provisioning process for new licensed users in Salesforce traveling from **Azure** active directory. Once this process was active, it saved a great amount of time for our corporate Salesforce associates by automating the long process of provisioning each new membership seller's license details with the proper accessibility and security controls, alongside greatly reducing all membership seller's struggles with proper access to sell memberships for their club effectively.

As opposed to all new users being provisioned from **Azure** active directory by all being placed into a single user group for Salesforce and landing in Salesforce as an active licensed user on a 'Chatter User' profile without any necessary pieces included on their license and needing manual corporate nurtring, here is how the process was designed and properly moved to production following testing in a full copy sandbox (**next slide**):

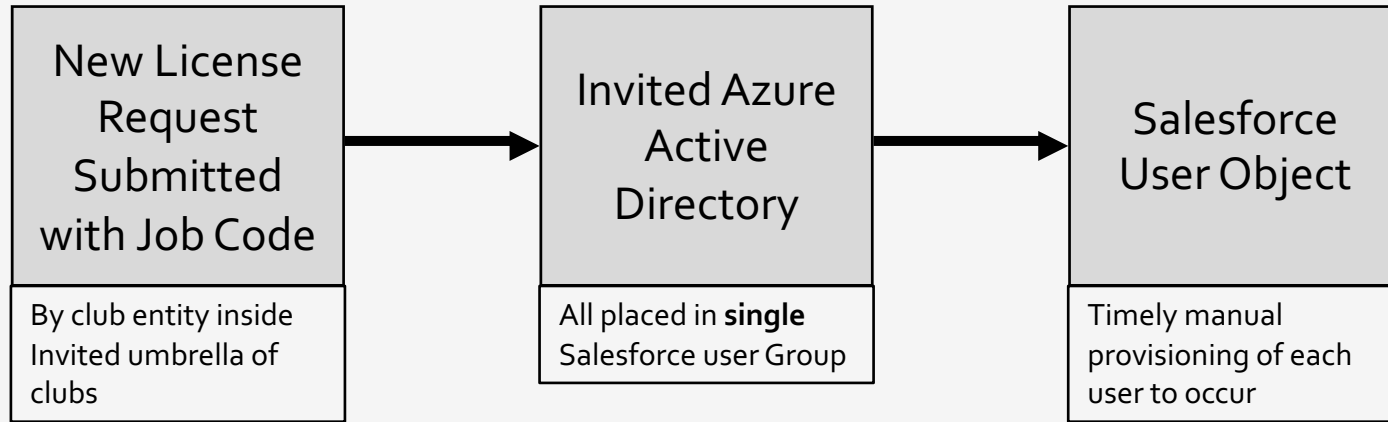# *Salesforce / IT Process – Example of Solution Designed 2022*

My Designed Solution Explained:

Prior to this automated piece being activated, all new licensed users were simply placed on an empty, active Salesforce license on a 'Chatter Free' profile. The one key I understood we could have been leveraging that we were not is a unique 6 digit '**Job Code**' (XXXXXX) that came across in Azure Active Directory that defined what job duties would need to be performed by that job code requested to be provisioned, thus what pieces were required to be added to that new user's license to give them the proper access in Salesforce to numerous tools to perform their job.
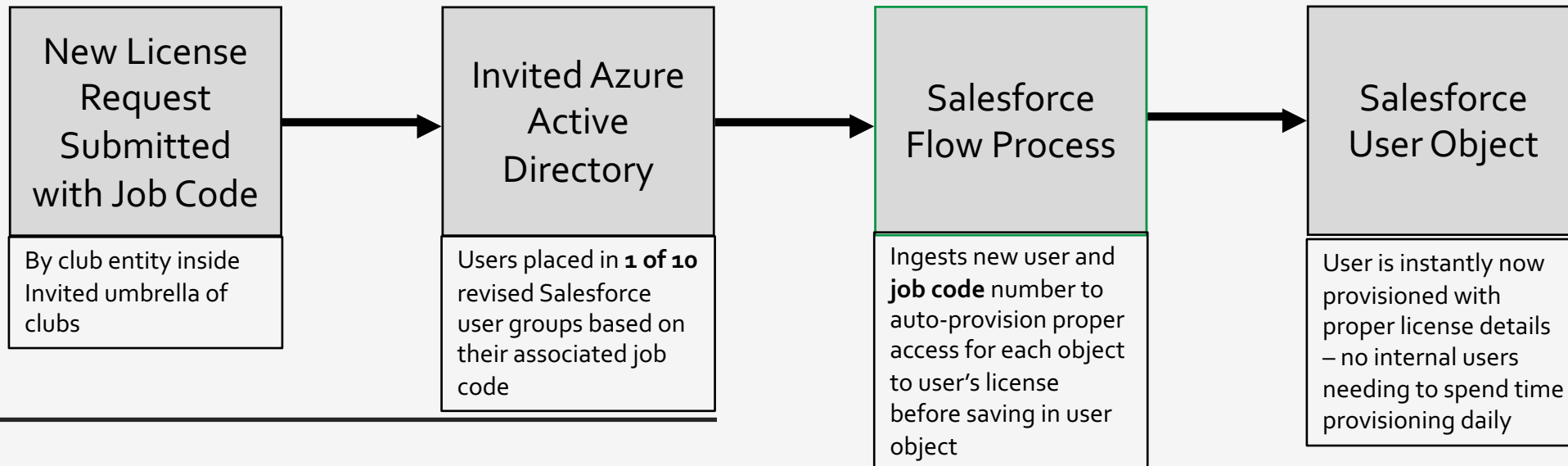
I created a new, complex flow inside flow builder that captured the user's 6 digit job code coming from Azure, and then defined what profile, permission sets, role, and public group were required to properly provision that user and add those access additions in an automated fashion.

Visualizations next slide:

Original User Provisioning Process

New License Request Submitted with Job Code	Invited Azure Active Directory	Salesforce User Object
By club entity inside Invited umbrella of clubs	All placed in **single** Salesforce user Group	Timely manual provisioning of each user to occur

Created Auto Provisioning Process

New License Request Submitted with Job Code	Invited Azure Active Directory	Salesforce Flow Process	Salesforce User Object
By club entity inside Invited umbrella of clubs	Users placed in **1 of 10** revised Salesforce user groups based on their associated job code	Ingests new user and **job code** number to auto-provision proper access for each object to user's license before saving in user object	User is instantly now provisioned with proper license details – no internal users needing to spend time provisioning daily

Summary

This is one of numerous examples of automations across multiple systems I have implemented in Salesforce, while working with teams across the organization to ensure the BEST solution for all involved is what arises once complete. Regardless of the system at hand, I will first always bring my 'nothing is impossible' mindset to the table. Not only will I ensure anything tied to my name on any system shows impressive results, I will always focus on the PEOPLE I work with and make certain that I am doing my part in knowledge transfer and properly building prosperous relationships for the organization.

Contact

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