

JAKE STEINMETZ

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PROFESSIONAL SUMMARY

Sales Development Operations leader with 8+ years of experience building scalable systems, dashboards, and automation that enhance SDR productivity, data accuracy, and go-to-market efficiency. Proven success in aligning Sales, Marketing, and RevOps teams to create predictable pipeline growth. Deep expertise in Salesforce, SalesLoft, and BI reporting, paired with hands-on experience developing AI software for call analysis and persona intelligence. Recognized for transforming SDR operations through data-driven decision-making, process rigor, and innovative use of technology.

CORE COMPETENCIES

- SDR Operations & Enablement
 - Salesforce CRM (Dashboards, Reporting, Workflow Design)
 - SalesLoft / Outreach Optimization
 - AI-Driven GTM Automation & Analysis
 - Process Design & SLA Compliance
 - KPI Reporting & Power BI/Tableau Analytics
 - Data Hygiene & Governance
 - Cross-Functional Alignment (Sales, Marketing, RevOps)
 - Workflow Automation & Integration Management
 - Persona Intelligence & Predictive Targeting
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PROFESSIONAL EXPERIENCE

GTM Operations Consultant

Alta Ridge Ventures | May 2023 - Present

- Serve as the strategic and technical lead for revenue operations and AI automation projects across SaaS organizations.
- Developed Influence Architect, an AI-powered call analysis and persona research platform, improving sales team effectiveness and messaging precision through conversation intelligence and data-backed coaching.
- Designed and deployed lead routing logic, scoring models, and SLA workflows in Salesforce and HubSpot to ensure follow-up accuracy and pipeline visibility.
- Implemented Apollo.io, SalesLoft, and Drift integrations for SaaS startups, automating enrichment, sequencing, and data syncs to eliminate manual tasks.
- Built and maintained executive dashboards in Salesforce and Tableau, tracking SLA adherence, pipeline velocity, and SDR performance trends.
- Consulted with RevOps and Marketing teams to implement AI-driven workflows (email personalization, conversation summarization, and lead scoring).
- Delivered measurable impact, including 33% faster time-to-first-meeting, 62% increase in reply rates, and 7% pipeline lift across client portfolios.

Director, Business Development - North America

Rossum AI | May 2022 – May 2023

- Built the company's first SDR infrastructure, spanning NA and EMEA regions, and delivered \$32M in qualified pipeline in 8 months.
- Led Salesforce and SalesLoft optimization projects, improving data integrity, forecasting accuracy, and global reporting.
- Integrated AI-driven call coaching (via Gong and Influence Architect) that improved cold-call response rates by 133% (3% → 7%).
- Partnered with Product and Marketing to align outbound data and campaign performance; developed dashboards to monitor ICP coverage, conversion rates, and pipeline progression.

Business Development Manager

Filevine | October 2021 – May 2022

- Managed and coached 10–15 SDRs to 132% team quota attainment, reducing SDR ramp time from 4 weeks → 2 weeks through onboarding and process design.
- Partnered with Marketing and RevOps to refine event-to-SDR workflows, improving lead conversion from 5% → 75%.
- Introduced structured KPI dashboards, enabling performance tracking and data-driven coaching.

Corporate Sales Development (XDR)

Workday | June 2019 – October 2021

- Collaborated with AEs, Marketing, and RevOps on pipeline forecasting and SDR performance analytics for Finance and HR solutions.
- Built outbound dashboards and implemented workflow automations in Salesforce, contributing to 46% YoY growth in the Finance vertical.
- Partnered with Product Marketing to apply data insights to outbound messaging and campaign optimization.

Sales Manager (Enablement & Analytics Focus)

Scheels | February 2010 – June 2019

- Created structured onboarding and performance tracking systems for 1,000+ sales associates, cutting ramp-to-quota by 50%.
- Implemented pricing and inventory analytics that increased category sales by 27% while reducing overstock by 10%.
- Partnered with vendors and data teams to optimize reporting accuracy and operational workflows.

EDUCATION

- **Master of Education in Sports Management**
- **Bachelor of Science in Kinesiology**
University of Minnesota, Twin Cities, MN

AWARDS

- **Top Global Sales Award** - Rossum AI (Q1 2023)
- **Sales Excellence Recognition** - Filevine (Multiple quarters 2021-2022)
- **Workday Core4 Award** - Excellence in Sales Execution and Leadership (Q1 2020)