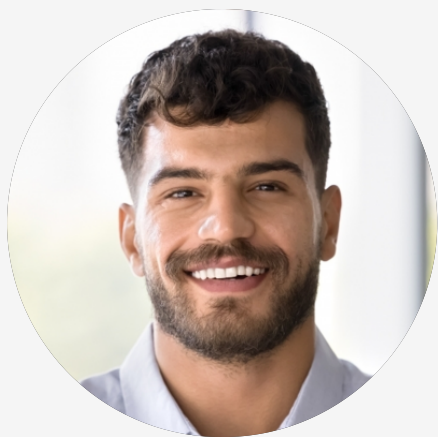




MARCUS WHITFIELD

Business operations manager with 7 years across SaaS and light manufacturing. Builds the connective tissue between sales forecasts, finance plans, and the teams executing the work. Known for turning messy spreadsheets into routines a new analyst can run on day one.



Charlotte, NC, OH



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KEY SKILLS

- SQL
- Excel (advanced)
- Looker
- Tableau
- Salesforce
- NetSuite
- Forecasting
- QBR prep
- Pricing analysis
- Python (pandas)
- Process documentation

PROFESSIONAL EXPERIENCE

BUSINESS OPERATIONS MANAGER

HALBERD LOGISTICS GROUP, CHARLOTTE, NC | JANUARY 2021 – PRESENT

- Own the weekly revenue forecast across four product lines; closed FY24 within \$87K of the September projection on a \$42M book.
- Rebuilt the lead-to-cash handoff with sales and AR, cutting average invoice-to-cash from 41 days to 29.
- Lead a team of three analysts; promoted two into senior roles after restructuring our reporting stack on Looker.
- Sit on the quarterly pricing committee, bringing margin analysis on roughly 60 SKUs each cycle.

SENIOR BUSINESS ANALYST

TRINTEX SOFTWARE, CHARLOTTE, NC | MARCH 2019 – APRIL 2021

- Built the company's first churn model in SQL and Python after the prior version missed three large logo losses in Q2.
- Ran QBR prep for the VP of Sales, including territory rebalancing that shifted about 18% of accounts.
- Partnered with FP&A on the annual operating plan, owning the headcount and commissions workbooks.
- Documented 14 recurring reports so the rotating MBA interns stopped breaking pipeline dashboards.

BUSINESS ANALYST

TRINTEX SOFTWARE, CHARLOTTE, NC | FEBRUARY 2017 – AUGUST 2019

- Supported the customer success org with weekly health-score reports covering ~400 mid-market accounts.
- Wrote the spec for the new renewals dashboard now used by every CSM on the team.
- Caught a billing rule that was undercharging six accounts a combined \$214K annually.

EDUCATION

B.S. Business Administration

University of North Carolina at Charlotte | March 2017

Google Data Analytics Certificate | January 2023

Tableau Desktop Specialist

February 2022