

JEFFREY XU

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Director, Sales & Commercial Operations | Sales Operations Transformation | Commercial Excellence

EXECUTIVE SUMMARY

Sales and Commercial Operations leader who builds the operating backbone that lets commercial teams focus on selling and shows leadership what is really happening. Most recently stood up the function from scratch for a \$100M, 13-site PE-backed cold-chain platform, spanning pipeline and CRM governance, pricing and contracts, territory and incentive compensation, and board-level reporting. Works directly in the CRM, data, and workflows and knows how that work needs to show up for reps, Finance, Operations, and executives, with versions of the build across cold chain, semiconductors, manufacturing, and SaaS. Turns operating gaps into stepwise roadmaps, governed workflows, and practical AI iterated with the field until adopted.

CORE EXPERTISE

- Commercial Operating Models & Sales Operations Transformation. Function build, leadership cadence, cross-functional governance, change management, field enablement, and adoption
- Pipeline, Forecasting, Territory & Incentive Compensation. Coverage, account ownership, quota, pipeline generation, payout controls
- CRM, Data Governance & Executive Reporting. Salesforce, NetSuite, analytics layers, dashboard architecture, board and QBR reporting
- Pricing, Contracts & AI-Enabled Workflows. CPQ and CLM, GRI, onboarding, prospecting, self-service tools

PROFESSIONAL EXPERIENCE

Envision Cold | PE-Backed B2B Cold Chain Logistics | \$100M

Director, Sales Operations & Strategy | Apr 2025 - Present | Remote

- Function build and operating model. Established and now lead Sales Operations for a \$100M, 13-site cold-storage platform, building the commercial operating backbone across pipeline, CRM, revenue planning, pricing and contracts, prospecting, reporting, onboarding, incentive compensation, and AI-enabled workflows.
- Leadership cadence and forecast discipline. Instituted pipeline definitions, source and ownership logic, coverage, conversion, velocity, pace-to-plan, and weekly pipeline and forecast reviews.
- CRM governance, lead management, and onboarding. Implemented stage gates, data-quality and ownership controls, inbound qualification and routing, and a two-track onboarding model that moves strategic opportunities to reps and smaller accounts into a GM self-service workflow.
- Field decision dashboards. Shipped frictionless, call-to-action dashboards that piped governed pipeline, revenue, and site-operations data into one easy-to-use view, giving reps and leaders immediate visibility into funnel health, past-due and stale opportunities, site performance, and clear ownership actions.
- Self-serve executive analytics. Built the commercial data platform on the company's Sigma/Snowflake warehouse layer, with governed nightly feeds, locked metric definitions, and live dashboards covering revenue, NOI, Ops, AR, budget pace, and funnel movement. By site, customer, and leader with numbers reconciled across the reporting stack.
- Pricing and contract operations. Modernized commercial pricing infrastructure by designing the WRA agreement and 13 rack-rate templates, establishing a single CPQ-based source of truth, and launching contract digitization across the legacy book to support a materially faster annual GRI cycle.
- Incentive compensation, quotas, and territory. Own the sales-planning stack end to end, working quota setting, capacity planning, and coverage, including the territory reorganization. Govern comp eligibility, approvals, exceptions, and payout readiness, reconciling won opps to invoiced revenue, credits, refunds, and collections before handoff.
- AI operating model. Created the commercial AI program with outcome-first in mind. Turned company data, sales definitions, and operating rules into governed workflows with controlled templates, data checks, and guardrails, so reps and leaders get finished deliverables without learning prompting or back-end tools. Every rollout ships with 1:1 enablement and iterates on field feedback until adopted.
- Prospecting engine. Developed a two-path AI prospecting engine over trade and company data that scores accounts, builds enriched rep-ready call lists, and answers natural-language searches for buying committees and verified contacts. Delivered 700+ high-tier targets for two underperforming sites within weeks, and outreach and replies log automatically, so reps only work the list.
- Field execution. Returned 3+ hours of admin time per rep per week with a company-grounded daily brief covering priorities, replies to chase, churn signals, and next steps. Updates publish once centrally and reach every rep's brief.
- Commercial deck engine. Cut branded QBR and discovery-deck production from 1 to 2 weeks to under 10 minutes with a governed, modular platform combining Marketing standards, DataOps controls, and Sales Ops workflows. Decks reconcile to the same governed data as the dashboards, carry forward prior decisions and next steps.

PROFESSIONAL EXPERIENCE (CONTINUED)

Optimal | PE-Backed B2B SaaS | \$10M ARR

Manager, Revenue Operations | Jun 2024 - Mar 2025 | Remote

- Pipeline, forecast, and GTM leadership. Owned weekly pipeline reviews, monthly forecasting, and QBR cadence for 5 AEs and 2 SDRs, partnering with the VP Sales to improve Salesforce adoption, KPI visibility, speed to lead, and forecast discipline.
- Salesforce redesign. Redesigned Salesforce across lead scoring, MQL thresholds, stage gates, lead handling, SDR booking workflows, and cross-functional handoffs, improving speed to lead and forecast discipline.
- Conversion and attribution. Built lead-to-win conversion, velocity, attribution, and ROI-by-source reporting and standardized handoffs across Sales, SDR, Customer Success, and Finance.

Materion | Public B2B Semiconductor Materials Manufacturing | \$400M Segment

Manager, Sales Operations | Nov 2021 - May 2024 | Remote

- Enterprise operating cadence. Directed forecasting, reporting, pipeline inspection, and MBR and QBR cadence for a \$400M segment supporting 30 sales managers, 3 directors, and the VP Sales.
- Data foundation. Created the Power BI layer that became the single source of truth across Sales, Product, Finance, and FP&A, with self-service reporting for bookings, shipments, forecast, and CRM performance.
- Item-level forecasting. Designed the forecasting process and reporting package covering accuracy, month-over-month movement, and budget-to-forecast, then led enablement and adoption across the sales organization.
- CRM partnership. Served as the business SME for reporting and workflows, establishing rules of engagement, automation, and layout improvements with IT.

Bobrick | Family-Owned B2B Manufacturing | \$300M

Manager, Sales Operations | Mar 2016 - Oct 2021 | Los Angeles, CA

- Sales Operations build. Launched and led Sales Operations and reporting for the Americas from scratch, supporting 5 sales managers, a director, and the VP Sales across quoting, territory management, and systems.
- Territory reporting. Created an automated Power Query sales cube and territory-management packets that reduced manual reporting and improved territory visibility.
- ERP and CRM implementation. Served as business SME for the Infor implementation and built the reporting layer connecting new and historical data.
- Cross-functional foundation. Progressed through Bobrick's management program across analytics, production, customer integrations, and Sales Operations, grounding later commercial operating-model work.

EDUCATION

University of California, Los Angeles (UCLA) | Bachelor of Science, Neuroscience

SELECTED PLATFORMS

NetSuite | Salesforce | Infor | SAP | Sigma/Snowflake | Power BI | Power Query | Advanced Excel | ZoomInfo | Microsoft 365/Power Automate | Claude Projects/Cowork | LLM Agents & MCP | OpenAI Codex | Adobe Sign/DocuSign