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## **Customer Success & Director of Operations**

Results-driven operations and customer success leader with 15+ years of experience driving growth, optimizing systems, and leading high-performing remote teams. Known for transforming workflows, improving retention, and building scalable infrastructure that aligns with business goals. Proven ability to leverage Salesforce CRM, automation, and data insights to enhance customer engagement, efficiency, and profitability across B2B and global markets.

### **Core Competencies**

Customer Success Leadership – NRR/GRR metrics, customer journey mapping, retention, and expansion

Salesforce CRM Expertise (8 years) – Dashboards, analytics, reporting, and automation

Operations & Process Optimization – SOP design, workflow automation, and cross-functional alignment

Sales Strategy & Enablement – Pipeline forecasting, KPI tracking, and revenue growth

Supply Chain & Fulfillment – Logistics coordination, inventory management, cost reduction

Data Analysis & Business Intelligence – Trend analysis, forecasting, and insight-driven decisions

Team & Stakeholder Management – Global team leadership, coaching, and executive alignment

### **Key Achievements**

218% export sales growth in the first year leading export, maintaining 18–24% YoY growth, \$0 travel budget

Reduced operational costs by 29% through process redesign, workflow optimization, and Salesforce automation

Grew wine club membership from 0 to 5,000+ members in one year, driving significant DTC revenue

Exceeded wholesale team sales goals by 23% using data-driven forecasting and production alignment

Secured partnerships with global brands including American Airlines, Disney, Costco, LCBO, Marriott, and Restoration Hardware

## **Professional Experience**

### **Director of Customer Success | G&R Law Group | 2024 – 2025**

Oversaw client onboarding, renewals, and retention programs to enhance satisfaction and long-term value.

Built scalable client follow-up, reporting, and communication systems using Salesforce and automation tools.

Partnered with legal and operations teams to streamline client intake, improving time-to-value and transparency.

Launched engagement initiatives that improved consistency and strengthened client relationships.

### **Vice President of Operations, Export Sales & Wholesale | Blackbird Vineyards | Remote | 2015 – 2024**

Directed global operations across sales, marketing, finance, and fulfillment for 18 U.S. states and 12 international markets

Led a 12-person cross-functional team to improve visibility, accuracy, and collaboration through Salesforce CRM

Developed data dashboards and reports that informed executive strategy and production planning

Implemented SOPs and process automation that reduced fulfillment time and improved order accuracy

Cultivated high-value B2B relationships through consultative sales and data-driven performance reviews

### **Wholesale Order Management & Financial Operations Specialist | Somerston Wine Co. | St. Helena, CA | 2013 – 2015**

Led inventory and financial reconciliation across multi-location warehouses, improving reporting accuracy

Introduced cost-tracking and revenue recovery processes that strengthened financial transparency

Supported sales forecasting and logistics planning to improve delivery consistency and client satisfaction

### **Client Services & Wine Club Manager | VIADER Vineyards & Winery | Angwin, CA | 2008 – 2013**

Built the direct-to-consumer wine club from launch to 5,000+ members within the first year

Designed retention programs and customer engagement campaigns to boost recurring revenue

Coordinated private events and VIP experiences that elevated brand reputation and loyalty

## **Education**

Pacific Union College

Bachelor of Business Administration - BBA Business Administration and Management