

Carlos Penate

RevOps Manager & GTM Engineer

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PROFILE

- Revenue Operations Manager and GTM Engineer with 11+ years of experience designing and scaling go-to-market systems that connect sales, marketing, customer success, and finance operations. Combines a strong software engineering background with deep expertise in CRM architecture, automation, and revenue analytics to build scalable infrastructure that improves pipeline visibility, forecasting accuracy, and operational efficiency.
- Experienced in architecting end-to-end revenue workflows, integrating complex SaaS ecosystems, and operationalizing data across the full customer lifecycle—from lead acquisition through expansion and retention. Proven ability to translate business strategy into technical systems, automate manual processes, and enable data-driven decision-making for executive leadership.
- Passionate about GTM engineering, workflow automation, and leveraging AI-driven tooling to create intelligent, scalable revenue engines.

PROFESSIONAL EXPERIENCE

RevOps Manager & GTM Engineer

06/2024 – 03/2026 | Provo, UT

Qualtrics

- Led the evolution of GTM systems supporting enterprise Sales, Marketing, and Customer Success teams by designing scalable operational architecture connecting Salesforce, marketing automation, and product analytics ecosystems across multiple business units
- Built end-to-end lifecycle automation spanning lead capture, qualification, routing, opportunity management, and customer expansion workflows, reducing manual operational touchpoints and improving funnel velocity
- Designed integrations connecting product usage signals with CRM records to enable data-driven expansion plays and proactive churn prevention workflows used by account teams
- Developed centralized revenue data pipelines leveraging AWS and GCP services to standardize reporting definitions across finance, RevOps, and executive leadership teams
- Introduced controlled deployment and change-management processes for revenue systems configuration, improving reliability and reducing production issues during GTM launches
- Partnered with analytics teams to redefine KPI frameworks and revenue dashboards, enabling leadership to monitor pipeline health, conversion efficiency, and forecast risk in near real-time
- Integrated billing and finance systems into GTM reporting workflows, aligning bookings, ARR tracking, and operational metrics used for executive planning and board reporting
- Mentored RevOps analysts and system administrators on automation design, data governance, and scalable system thinking to reduce operational dependency on manual workflows
- Collaborated with Sales, Marketing, Finance, and Recruiting leadership to translate growth initiatives into executable systems requirements and automation roadmaps

- Contributed to long-term GTM engineering strategy by evaluating AI-driven tooling and workflow automation platforms to increase personalization and operational efficiency at scale

Revenue Operations Manager

02/2020 – 05/2024 | Las Vegas, NV

Credo Technology Group

- Served as primary RevOps partner to sales leadership, supporting pipeline management, forecasting processes, and operational strategy for a growing managed services organization
- Redesigned lead lifecycle and opportunity management processes within CRM, improving visibility into deal stages and enabling leadership to identify pipeline risk earlier
- Built automated workflows connecting CRM, service delivery, and billing platforms to ensure accurate handoff from closed deals to onboarding and recurring revenue tracking
- Developed executive dashboards tracking bookings, renewals, customer health, and rep performance, replacing fragmented spreadsheet reporting used across departments
- Managed operational tooling and integrations hosted in cloud environments, ensuring reliable synchronization of customer and revenue data across systems
- Worked with executives to define operational KPIs and establish standardized definitions for revenue metrics used in quarterly planning and performance reviews
- Partnered closely with marketing to improve inbound lead qualification and attribution tracking, enabling clearer ROI measurement across acquisition channels
- Led internal enablement initiatives training sales and operations teams on CRM workflows, improving adoption and significantly reducing data quality issues
- Delivered forecasting models and operational analysis supporting hiring plans, territory adjustments, and annual revenue planning discussions

Salesforce / Systems Engineer

08/2017 – 12/2019 | Reno, NV

NVITS

- Administered and enhanced Salesforce environments supporting SMB client sales and service operations, ensuring system alignment with evolving business workflows
- Built API-based integrations between Salesforce and external tools including support ticketing, invoicing, and marketing systems to reduce duplicate data entry
- Designed workflow automation, approval processes, and custom objects that standardized lead management and customer onboarding procedures
- Created operational dashboards enabling leadership to track pipeline activity, service performance, and customer engagement metrics
- Led CRM data cleanup initiatives including deduplication logic, validation controls, and governance standards improving reporting accuracy
- Acted as internal systems resource for sales and service teams, diagnosing workflow bottlenecks and implementing configuration improvements to increase productivity
- Gathered business requirements from stakeholders and translated them into scalable CRM solutions supporting company growth without increasing operational overhead

Data Analyst & Sales Development Representative

07/2014 – 07/2017 | Reno, NV

Render Analytics

- Analyzed CRM and campaign data to identify conversion trends and prospect engagement patterns, providing leadership with insights used to refine early GTM strategy
- Built recurring pipeline and activity reports using SQL and spreadsheet models, giving sales leadership visibility into outreach effectiveness and funnel performance

- Executed outbound prospecting campaigns while documenting common objections and qualification challenges, helping shape early lead scoring criteria
- Maintained CRM hygiene through enrichment and data normalization efforts, improving accuracy of reporting and targeting for outbound campaigns
- Partnered with founders and sales leadership to iterate messaging based on performance analytics and customer feedback gathered during outbound conversations
- Documented and standardized early sales workflows and qualification processes, enabling the company to scale SDR onboarding as the team expanded

EDUCATION

University of Nevada, Reno

09/2019 – 11/2021 | Reno, NV

Master of Science (M.S.) in Information Systems

Data Systems, Analytics, Enterprise Architecture

University of Nevada, Reno

09/2010 – 05/2014 | Reno, NV

Bachelor of Science (B.S.) in Computer Science

APIs & integrations, Automation mindset, Data modeling, Technical credibility in RevOps roles

SKILLS

- **Revenue Operations & GTM Strategy:** Revenue Operations, GTM Engineering, Go-to-Market Strategy, Revenue Funnel Optimization, Sales & Marketing Alignment, Customer Lifecycle Management, Pipeline Management, Forecasting & KPI Development, Territory Planning Support, Revenue Analytics
- **CRM & Revenue Platforms:** Salesforce Administration & Architecture, CRM Configuration, Lead Lifecycle Management, Opportunity Management, Data Governance, Workflow Automation, CRM Reporting & Dashboards, User Enablement & Training
- **Automation & Systems Integration:** API Integrations, Workflow Automation (Make, Zapier), Webhooks, System Integration Design, Lead Routing Automation, Data Synchronization, Process Automation, AI Workflow Implementation
- **Data & Analytics:** SQL, Data Modeling, Revenue Reporting, Dashboard Development, Business Intelligence, Funnel Analysis, Attribution Modeling, Forecast Modeling, Data Quality Management, Operational Analytics
- **Programming & Technical Skills:** Python, Ruby, JavaScript (ES6+), TypeScript, RESTful APIs, Backend Integration Development, Script Automation, JSON Data Handling
- **Databases & Infrastructure:** PostgreSQL, MySQL, Database Design, Query Optimization, Data Pipelines, Cloud Data Workflows
- **Cloud & DevOps:** Amazon Web Services (EC2, S3, RDS), Google Cloud Platform, Docker, CI/CD Pipelines, GitHub Actions, Version Control (Git)
- **Business Operations & Collaboration:** Stakeholder Management, Cross-Functional Collaboration, Executive Reporting, Process Documentation, Agile/Scrum Methodologies, Operational Strategy, Change Management