

Jordan Patterson

Business Systems & Operations | CRM/ERP Optimization · Process Improvement · Reporting & Automation
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PROFESSIONAL SUMMARY

Business systems and operations professional with 5+ years across systems implementation, cross-functional process improvement, and customer experience. Owns business-critical customer relationship management (CRM) and enterprise resource planning (ERP) workflows, builds reporting and automations that strengthen data visibility, and turns ambiguous business problems and requirements into practical systems and repeatable processes. Carries initiatives from problem definition through research, implementation, and user adoption to improve efficiency, accountability, and decision-making across Sales, Customer Service, and Operations.

CORE COMPETENCIES

Business Systems Ownership · CRM Administration (HubSpot, Zendesk) · ERP Optimization · Requirements Gathering · Process Improvement & Workflow Design · Reporting & Dashboards (Excel VBA, Power BI) · Workflow Automation & Integrations (n8n) · Data Quality, Integrity & Governance · Technology & AI / Automation Evaluation (AI, Codex, OpenClaw) · Change Management & User Adoption · Cross-Functional Leadership · Stakeholder Management · Training & Documentation

PROFESSIONAL EXPERIENCE

Manager, Strategic Initiatives & Customer Experience · Richards & Richards, LLC Apr 2025 – Present
Business Systems · Process Improvement · CRM / ERP Optimization

Own and improve the business systems and cross-functional workflows the company runs on — CRM, ERP, reporting, and automation — partnering with leadership and stakeholders across Sales, Customer Service, Operations, and IT to translate business needs into reliable systems and repeatable processes.

- Directed full HubSpot CRM implementation — configuration, automation, and user training — migrating the company off its legacy CRM within two months.
- Lead Total Recall (ERP) cleanup and process standardization: defining data standards, correcting inconsistent cross-department usage, and improving data quality to make leadership reporting reliable and build a foundation for automation.
- Lead cross-functional process improvement across Sales, Customer Service, and Operations — mapping workflows, clarifying ownership, and repairing handoffs to reduce errors, rework, and miscommunication.
- Built integrations and automations connecting HubSpot, Zendesk, and ERP systems, and developed dashboards that improved reporting accuracy, cut manual workload, and gave leadership clearer visibility into sales, service, and operations.
- Directed the implementation and launch of a client web portal for account access, service requests, and payments, reaching 13% adoption in its first quarter.
- Built a VBA macro-enabled IT asset disposition (ITAD) tracking system for device-level inventory, replacing manual counting with real-time visibility.
- Evaluate AI and automation tools against real business problems — weighing cost, risk, and implementation effort, and prototyping internal use cases before recommending adoption.
- Supported data integration and system readiness for business acquisitions, ensuring operational continuity at close.

Customer Service Manager · Richards & Richards, LLC

Oct 2022 – Apr 2025

Managed day-to-day operations of the Customer Service department, overseeing client communication, service quality, and process efficiency.

- Directed full Zendesk implementation, standardizing customer service workflows and improving ticket visibility.
- Streamlined workflows and standardized documentation and operating procedures (SOPs), reducing customer response times.
- Led onboarding and training programs for customer service staff to improve consistency and product knowledge.
- Used recurring customer and service issues to surface broader system and process gaps, informing later business-systems work.

Realtor · The Ashton Real Estate Group

Jan 2022 – Oct 2022

Managed client relationships through all stages of the home buying and selling process, providing market research, documentation support, and contract negotiation.

- Delivered personalized client experiences while maintaining compliance with real estate regulations.
- Strengthened organizational and communication skills in a fast-paced, client-driven environment.

Technical Support & Sales Representative · Asurion

Jan 2020 – Nov 2021

Provided remote technical support and troubleshooting for customers, pairing sales expertise with technical problem-solving.

- Diagnosed and resolved device and software issues efficiently, earning high customer satisfaction ratings.
- Recognized for exceeding sales and support performance targets through clear communication and solution-based service.

EDUCATION

Bachelor of Arts in Education · Middle Tennessee State University, 2015**CERTIFICATIONS**

Google Project Management Professional Certificate (Coursera) · HubSpot Inbound Marketing · HubSpot Sales Hub Software

TECHNICAL SKILLS

CRM & Customer Service HubSpot CRM, Zendesk**ERP** Total Recall Envision**Reporting & Data** Power BI, Microsoft Excel (VBA)**Automation & AI** n8n, Claude Code, Codex, Lovable, OpenClaw