# Westley Smith

Modesto, California · westley.business@gmail.com · linkedin.com/in/westleys

## SUMMARY

Data and systems professional who builds platforms, analytics, and operating processes that shape how businesses operate and grow. First in-house data hire at First Tactical; co-built the data platform and now building a new Sales Operations function.

## EXPERIENCE

**First Tactical** *Modesto, California*
*Data Analyst / Report Developer* *July 2025 - Present*

- Designing a new Sales Operations function spanning 6 to 8 planned roles across coordinators, inside sales, and analytics; evaluated and selected route-planning technology, integrated it with CRM workflows, and launched a pilot supporting 70 partner dealers and 2,000+ prospective agencies
- Co-built the company's Microsoft Fabric data platform and Power BI reporting layer, replacing fragmented Excel reporting with a governed enterprise data model; now supports 31 active reports, 66 users, and roughly 2,000 monthly views
- Built a geospatial territory-planning application across 1,500+ dealers and a market-sizing model covering 3,100+ U.S. counties, combining dealer performance, geographic coverage, and revenue opportunity; analysis has supported 6 territory redesigns and the business cases used to evaluate new field-sales headcount
- Co-developed automated reporting workflows in Microsoft Fabric for company financials, bookings, P&L, and performance metrics, replacing manual processes with notebook-driven pipelines and AI-assisted reporting; helped implement a conversational AI layer for querying company data directly
- Co-led implementation and adoption of Zoho CRM, Fulcrum, and Power BI across a 40-person sales and operations organization; designed training, led onboarding across 6 regions, and administer the systems supporting field execution

**Stanislaus County Behavioral Health & Recovery Services** *Modesto, California*
*Data Analyst Intern* *February 2025 - May 2025*

- Wrote and optimized SQL queries in SSMS to extract and analyze EHR data; designed Power BI dashboards giving leadership visibility into client demographics and program performance

**E&J Gallo Winery** *Modesto, California*
*Business Systems Analyst Intern* *June 2024 - October 2024*

- Built and deployed a ServiceNow ticketing workflow through ACC, QA, and production; documented a Finance Access database and its dependencies to guide system replacement; presented both to Gallo IT leadership

**G3 Enterprises** *Modesto, California*
*IT Analyst* *February 2022 - April 2023*

- Managed IT asset inventory for 300+ employees achieving $118,548 in annual cost savings; automated service management processes and provided Tier 2 support; led company-wide migration from legacy phone software to Microsoft Teams Phone

## EDUCATION

**California State University Stanislaus** *Turlock, California*
*Bachelor of Science in Business Administration, Concentration in Computer Information Systems* *August 2023 - May 2025*

## PROJECTS

**Pocket Check LLC** **pocketcheck.app**
*Founder* *2025 - Present*

- Built and operate a personal finance platform across web and iOS, integrating bank and investment accounts through Plaid and SnapTrade, AI transaction categorization, and subscription billing through Stripe and Apple

## VOLUNTEERING

**Alaska Christian College** *Soldotna, Alaska*
*Service and Support Volunteer* *June 2023 & August 2025*

- Traveled to Soldotna, Alaska to help construct a college campus serving Alaska Native students from remote villages, many working through addiction, abuse, and trauma as they pursue education

## SKILLS

**Technical:** Power BI, Microsoft Fabric, SQL, ETL and data pipelines

**Systems:** Zoho CRM, Fulcrum, RouteIQ, Power Automate, ERP data integration

**Analytics:** Operational modeling, revenue analysis, territory planning, market sizing, KPI reporting