

Rajannah Matra

Customer Experience Strategy & Operations Leader
| CRM & Automation Consultant

CONTACT

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CORE COMPETENCIES

- CX & Customer Insights
- CX Strategy & Design
 - Journey Mapping & Service Blueprinting
 - Customer Insights & Analytics
- Operational & Strategic Leadership
- Operational Strategy
 - Process Optimization
 - Cross-Functional Leadership
 - Change Management
 - Stakeholder Engagement
- AI, Systems & Digital Transformation
- AI Automation & Workflow Architecture
 - Digital Transformation
 - CRM Architecture (Salesforce, HubSpot, Airtable)
 - Data-Driven Decision Making
- Execution & Delivery
- Project Management

TOOLS & SYSTEMS

Airtable • Zapier • Notion
Salesforce • HubSpot
Deputy • Shopify • Vivenue
Google Workspace • Microsoft 365
Slack • Asana • Trello
OpenAI • Claude • Perplexity

CERTIFICATIONS

CAPM (Completed)
Salesforce Administrator (In Progress)
Power BI (Planned)
Digital Marketing Foundations (Google/YouTube)

EDUCATION

B.S. Business Administration — Finance
Bay Path University
Expected Dec 2025

PROFESSIONAL SUMMARY

Customer Experience Strategy & Operations Leader specializing in CRM architecture, workflow design, and AI-enabled automation that strengthens customer engagement and operational performance. Known for turning ambiguity into structured frameworks, building scalable systems, and driving cross-functional alignment across global, fast-moving teams. Blends CX design, operational insight, and technical execution to deliver measurable improvements in efficiency, response time, customer satisfaction, and lifecycle visibility. Founder of Sky Heights Consulting, partnering with small and mid-sized businesses to architect CRM ecosystems, automate workflows, and enable data-driven decision-making.

KEY ACHIEVEMENTS

- Designed and operationalized CX and workflow frameworks that improved service consistency, accelerated issue resolution, and strengthened customer satisfaction across multi-state operations.
- Built automated systems using Airtable, Zapier, and Notion to streamline intake, scheduling, vendor communication, and reporting — reducing manual workload and improving operational visibility.
- Led regional operations for 10+ venues, enhancing partner relationships, field performance, and execution quality across multiple stakeholders and teams.
- Developed CRM-driven processes enabling small-business clients to track customer acquisition, retention, and performance metrics with greater accuracy and strategic clarity.
- Formalized onboarding, compliance, vendor communication, and cross-team workflows that improved operational efficiency and reduced friction across departments.

PROFESSIONAL EXPERIENCE

Founder & Strategy/CX/Automation Consultant | Sky Heights Consulting

Remote | 2023–Present

- Streamlined client workflows by automating intake, scheduling, customer follow-ups, and reporting — reducing manual workload by 30–50% depending on client.
- Improved operational visibility through CRM dashboards that increased tracking accuracy for customer lifecycle and team performance by 40%+.
- Enhanced client CX by designing onboarding frameworks that reduced confusion and improved engagement consistency by 25–35%.
- Delivered automation systems that cut administrative errors by up to 60%, enabling owners to focus on revenue-driving tasks.

Regional Operations Manager (Contract) | Poseidon Music Ltd

Remote | Oct 2024–May 2025

- Oversaw operations across 10+ venues, improving operational readiness scores and consistency by 35% through standardized SOPs and cross-team communication.
- Reduced regional staffing gaps by 40% through improved hiring, scheduling, and escalation processes using Deputy and Airtable.
- Improved merchandise accuracy and fulfillment efficiency across 55+ venues, cutting discrepancies by 30%.
- Successfully led 20+ venue openings and 12+ closures, delivering 100% on-time launches in high-pressure environments.
- Enhanced escalation response times during live shows, resolving issues 20–30% faster across supported regions.

Venue Representative (Prior Role)

May 2024–Oct 2024

- Supported show operations, customer experience, merchandise execution, and venue-level reporting as frontline brand representation.

Strategic Operations Assistant | DuPont (Contract)

Marlborough, MA | Aug 2023–Oct 2024

- Reduced vendor communication response time by 50% through redesigned workflow and communication protocols.
- Improved onboarding compliance and safety readiness across contractors with 100% adherence to orientation procedures.
- Built dashboards that increased visibility into operational KPIs, enabling leaders to track progress and risks 30% more efficiently.

Regional Strategy & Support Coordinator | M&T Bank

Worcester, MA | Jan 2023–Jun 2023

- Coordinated strategic initiatives, regional communications, events, and executive-level operations.
- Streamlined cross-department workflows, improving alignment and operational clarity.
- Managed vendor relations, budgeting logistics, and internal event execution.

Operations & Appraisal Support Analyst | Maria Hopkins Associates

Worcester County, MA | Jan 2019–Dec 2022

- Led onboarding, training, and process development for field contractors, improving operational readiness and compliance.
- Oversaw appraisal submission workflows across multiple platforms, ensuring accuracy and regulatory alignment.
- Served as an escalation point for complex client cases, supporting customer satisfaction and long-term retention.

Operations Project Coordinator | DHK Architects, Inc.

Oct 2018–May 2019

- Managed firm-wide operations, including vendor coordination, finance processes, HR onboarding, AP/AR, compliance tasks, and audit preparation.

EARLIER CAREER EXPERIENCE

Listed for chronology; available upon request.

Territory Sales Manager, PTM Consulting

Lead Inventory Manager & CX Specialist, Aveda

Executive Assistant, Sylke Music School

Department Operations Assistant, Northeastern University

Operations Administrative Assistant, Tufts Health Plan

Front Desk & Client Services, Shear Elegance Salon

CONSULTING & PROJECT HIGHLIGHTS

- CX Blueprint Project: Designed a customer journey map and onboarding workflow to improve engagement and reduce friction for a retail client.
- Automation Build: Developed an automated CRM + intake tool using Airtable + Zapier, replacing manual tracking and strengthening reporting.
- Retention Strategy Audit: Conducted lifecycle analysis and built a retention-focused touchpoint framework to enhance post-purchase experience.

COMMUNITY & LEADERSHIP

Volunteer, Rhode Island Hospital

Local Small Business Mentor & Supporter

Community Outreach & Leadership Roles