ROBERTO SANTANA

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SUMMARY

B2B Marketing | Demand Generation | Email & Content | Vertical SaaS

Hands-on B2B marketer with 12 years in software, most recently in vertical SaaS. Builds and runs campaigns directly: email, webinars, SEO and content, paid digital, and the website, backed by Pardot, Salesforce, and Power BI reporting on pipeline and attribution. At RO Writer grew inbound leads 117% year over year by marketing a cloud platform to a legacy installed base, with Sales and Support aligned on migration and launch messaging. Before that, built and led a team at Cyncly and rose to Director. Plans the program, then builds and runs it.

WORK EXPERIENCE

Marketing Director, RO Writer (Maternity Leave Contract) — 2025 – Oct 2026

Fixed-term contract covering a maternity leave. Led marketing for a vertical SaaS platform serving independent auto repair shops, a hands-on small-business audience.

- Grew **inbound lead volume 117% year over year** across the first seven months (548 vs 253 leads) with email campaigns and webinars moving legacy desktop customers to the cloud platform.
- Wrote **email and webinar copy and SEO blog content** directly, publishing through WordPress and Yoast.
- Led a **full rebrand and website rebuild** through launch.
- Led the **event strategy** and grew events in 2026.
- Positioned and launched **RO Writer Connect**, a white-labeled marketing automation and CRM product, and equipped Sales and Support with FAQ and handling guidance on pricing and migration questions.
- Managed the **paid digital agency**, then moved paid digital in house.
- Rebuilt **marketing automation in Pardot** with standardized campaign naming and **UTM parameters**, and automated **Power BI reporting** on funnel conversion and marketing ROI.
- Built **AI-powered workflows with Claude** for recurring campaign and content tasks, and produced campaign creative with Claude Design, reducing manual effort.
- **Hired and onboarded two marketing roles** and built the 2026 to 2031 budget model, covering tradeshows, an ABM platform, and design capacity.

Cyncly — 2014 – 2025

Global vertical software company serving designers, retailers, and manufacturers in the kitchen, bath, flooring, window, and furniture industries, with about 70,000 customers in over 100 countries. Progressed from marketing automation specialist to Manager to Director.

Director, Marketing Acquisition & Operations — 2023 – 2025

- Consolidated three legacy **Marketo** instances and their connected CRMs into one operating model with common top-of-funnel definitions across business units.
- Designed **lead scoring and grading frameworks** and the routing logic behind them, focusing Sales on qualified demand and improving handoff reliability.
- Built unified **acquisition dashboards** published to the central data warehouse, giving business units shared visibility into acquisition metrics and marketing ROI.
- Led the **SalesLoft** implementation and its Salesforce integration, extending pipeline tracking across the sales engagement layer.
- Helped build the foundation for an **ABM function**.

Director, Marketing Automation & Growth — 2021 – 2022

- Co-authored the sales and marketing **rules of engagement**, contributing to a rise in unassisted e-commerce sales from 20% to 45%.
- Built weekly **MQL/SQL/SCL dashboards** to forecast pipeline growth and align marketing with Sales KPIs.
- Delivered automated lifecycle and nurture programs in **Pardot and Salesforce**.
- Promoted to leadership role reporting to the VP, Sales & Marketing.

Manager, Marketing Automation & Growth for SMB — 2018 – 2021

- Built and led a **4-person team** across performance marketing, demand generation, and automation, managing a **$200K annual SEM budget** and the tracking and reporting behind it.
- Designed automated lead-to-customer journeys in **Pardot**, growing lead generation 20% year over year.
- Implemented **lead grading and auto-nurture** flows that filtered out 40% of unqualified leads, improving SDR efficiency.
- Created and scaled the **inbound SDR process**, standardizing SQL definitions and lifting close rate from 10% to 18%.

CRM Marketing Automation Specialist — 2014 – 2017

- Self-taught in **marketing automation**; led the Pardot implementation and its integration into Salesforce.
- Enabled campaign attribution and lifecycle tracking for marketing-sourced revenue.

Marketing Manager, Cole-Parmer Canada — 2009 – 2014

- Modernized CRM and built tracking systems to improve attribution and analytics.
- Grew online sales by **90% over 4 years** through campaign optimization and Google Ads improvements.

EDUCATION

Marketing Diploma, Business Administration
McGill University

Bachelor of Arts, Psychology
Concordia University

SKILLS

Campaigns & Content
Demand generation | Email & webinar programs | SEO & content | Paid digital (Google, Meta, LinkedIn) | Event programs | ABM foundations

Brand & Web
Rebrand and website rebuild | Messaging & positioning | Product launches | WordPress & Yoast

Marketing Operations & Analytics
Salesforce, Marketo, Pardot, HubSpot, SalesLoft | Power BI (DAX), attribution & pipeline reporting | Lead scoring & routing | Practical AI workflows with Claude

Leadership & Partnership
Sales alignment | Agency & vendor management | Team building & hiring | Budgeting

Languages
English and French