**Summary**

* Certified: Salesforce Administrator 201, Sales Cloud, Service Cloud
* Multiple roles from Consultant, Solution Architect, Business Analyst, Project Manager
* Lead discussions with Executives to formulate strategic objectives and scope for Salesforce to leverage complete Salesforce platform
* Lead and document projects from initial discovery, requirements gathering and scoping to UAT and final approval
* Process flows and diagrams in Lucidchart to make complex processes understandable for technical and non-technical audiences
* Work with development resources to balance workload with requirements to ensure projects are delivered on time

**Salesforce Experience:**

**Mason Frank, Contractor, December 2019-present**

* Lightning Migration/Optimization
* New implementation Financial Services
* Standard Operating Procedure document Lending Company

**Nevro(contractor), Sr Salesforce Business Analyst/PM, March 2019-October 2019**

* Managed projects from qualifying requirements to final delivery
* Responsible for scoping timeline and resources required and meeting deadlines
* Scheduled meetings, presented status to management, documented project
* Presented solutions to Executive committee for approval
* Gathered requirements from business and helped define their vision
* Wrote test scripts and conducted UAT
* Launched 3 successful projects
* Conducted training and testing for Lightning migration
* Medical device company with GxP compliance requirements
* Led development team and support personnel

**Ninety10, Solution Engineer March 2018-January 2019**

* Qualify opportunities from Salesforce Account Executives
* Requirements gathering from key stakeholders
* SOW and Proposals for Salesforce deliverables
* Simplus, Solution Architect April 2017-Feb 2018
* Scoped timeline and resources vs budget to present to stakeholders
* Led development resources to meet schedules
* Compose SOW for the proposed Solution with use cases
* Conduct Analysis & Design meetings for requirements gathering
* Participate/Led internal and client facing status meetings on as needed basis
* Lead development teams and consultants onshore and offshore
* Work with stakeholders from A&D through delivery to ensure success
* Advisory Services: health check, change management

**Bluewolf, Solution Architect February 2016-March 2017**

* Compose Design Document for the proposed Solution
* Led development resources to meet deadlines and present to stakeholders
* Maintain technical documents for data model, workflow, processes
* Participate/Lead internal and client facing status meetings on as needed basis
* Document and present complete solution to all stakeholders
* Estimated and managed timeline
* Led requirement gathering sessions

**Salesforce Consultant December 2010-February 2016**

* Project Management from initial scoping, defining requirements, through
* implementation & training.
* Engaged with Executives to front line workers to understand and document all levels of requirements
* Sales & Service Cloud implementations
* Implement Best Practices for end-users and data quality
* Solidified User Adoption achieved through individual/group trainings
* 50% new implementations, 50% clean ups
* Executive suite reports and dashboards for forecasting, pipeline & sales activity
* Custom Objects and complete applications
* Opportunity management from Lead through Forecasting to Closed Won
* Configurations: Roles, Profiles, Security, Sharing Rules, Organizational/Forecasting
* Hierarchy
* Page Layouts including Field Level Security, adding custom fields, field mappings
* Pardot for email marketing, web landing, lead tracking
* Workflows/Process Builder to automate Record Types, Web Leads/Cases, Assignment, Opportunities
* Non-profit Starter Pack with customizations
* Data imports/Mass updates with Configero Data Loader, Salesforce Data Loader
* and Jitterbit
* Community Portals/Self-Service Portal setup
* EchoSign/Docusign implementation for contract signing & tracking
* Email To Case Premium implementation for Cases
* Products, Price Books, Quotes

**EDUCATION**

Bachelor of Arts degree in Liberal Studies, University of California, Santa Barbara

Certified: Admin 201, Sales Cloud, Service Cloud