**Frank Santana**

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* Certified Salesforce Administrator, ADM 201, since 2010.
* Certified Sales Cloud, Service Cloud since 2016
* 20 projects since 2012 as Project Manager, Business Analyst, and Solution Architect.
* Work with Executives to formulate strategic objectives for Salesforce
* Successful and diverse experience with start-ups, mid-sized and Fortune 500
* Proven ability to gain user adoption beyond expectations by leveraging experience

as end-user Sales Executive.

**Salesforce Experience:**

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

* Managed projects from qualifying requirements to final delivery
* 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

* Found opportunities with Salesforce Sales people and qualified
* Wrote Requirements documentation
* Attended Salesforce road shows

**Simplus, Solution Architect** April 2017-Feb 2018

* Compose SOW with time estimates for the proposed Solution
* Conduct Analysis & Design meetings for requirements gathering
* Participate/Lead 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
* 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
* Lightning and Communities along with skills listed below

**Salesforce Consultant** 2010-February 2016

Engagements with firms in various industries for custom onboarding of Salesforce.com

modules. Meet with top executives to understand strategic needs and goals, and then

formulate solution, project scope and timeline. Develop and deliver tailored sales training

on Salesforce usage and reporting. Additional expertise in developing proposals and

statements of work under deadline, coordinating inputs from management, internal IT,

sales and customers. Proficiency in Salesforce for creating:

* Project Management from initial scoping, defining requirements, through

implementation & training.

* Executive suite reports and dashboards for forecasting, pipeline & sales activity
* Custom Objects and complete applications
* Solidified User Adoption not previously achieved through individual and group trainings Implement Best Practices for end-users and data quality.
* Opportunity management from Lead through Forecasting to Closed Won
* 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
* Sales & Service Cloud implementations
* Data imports/Mass updates with Configero Data Loader, Salesforce Data Loader

and Jitterbit

* Community Portals/Self-Service Portal setup
* Configurations: Roles, Profiles, Security, Sharing Rules, Organizational/Forecasting

Hierarchy

* Page Layouts including Field Level Security, adding custom fields, field mappings
* Chatter for Opportunity tracking and file sharing
* EchoSign/Docusign implementation for contract signing & tracking
* Email To Case Premium implementation for Cases
* Products, Price Books, Quotes
* 50% new implementations, 50% clean ups
* Favorite AppExchange products: Cirrus: Gmail integration, Easy Describe: meta

data, Configero Data Loader, Duplicate Check, DBExchange for QuickBooks

**Previously Held Positions**

* **Datawatch,** Sales Executive, Western U.S. 2008 – 2010
* Salesforce Power User: involved cleansing data; reports/dashboards, imports
* **Morgan Stanley,** Financial Advisor, Santa Cruz, CA 2004 – 2008
* **Striva (acquired),** Sales Executive, U.S. 2002 – 2003
* **Ascential Software (acquired),** Account Executive, Western U.S. 1998 – 2001
* **D2K,** Inside Sales Manager, U.S. 1996 – 1998
* **Borland,** Government/Enterprise Sales Representative, U.S. 1989 – 1995

**EDUCATION**

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