

# SAAD ZAMAN

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## EDUCATION

### **MBA (concentration Finance)**

California State University, Northridge – Northridge, California

May 2019

### **B.A. Political Science/International Relations**

University of California, San Diego – La Jolla, California

June 2015

## CERTIFICATIONS

### **Salesforce Platform App Builder**

Salesforce – Credential ID 21328609

July 2020

### **Salesforce Certified Administrator (ADM 201)**

Salesforce – Credential ID 20545701

October 2019

## RELEVANT COURSEWORK/PROJECTS

- Financial Theory and Policy
- Financial Forecast Modeling
- Negotiations and Conflict Management
- Dissertation Project: “Creating a Product Development and Launch Plan for a Snack Food Company”

## EXPERIENCE

### **Salesforce Administrator**

Warner Pacific | Thousand Oaks, CA

03/2020 – 05/2020

*Reduction in workforce due to Covid-19*

- Produced Salesforce user training manuals for multiple departments and maintained ongoing documentation processes as business needs evolved/new features were added.
- Provided training, troubleshooting, new release communication, day-to-day end-user support to 30+ users in Salesforce, and assisted users with best practices.
- Developed and managed reports, dashboards, and processes to continuously monitor data quality and integrity for the Sales & Pre-Sales departments enabling Executives to track key performance metrics.
- Worked directly with the VP of Sales to understand and implement reports and dashboard upgrades, while adhering to best practices.
- Used a Sandbox environment for testing/adoption of new features; and managed change sets for deployments.
- Participated in the planning and analysis of business requirements for configuration changes and bug fixes including maintenance and user management of InGenius (telephony system).
- Managed user setup, profiles, field creation, page layouts, permissions, record types, and applications in Lightning.
- Troubleshot problem areas in a timely and accurate fashion and provided end-user assistance where required.

### **Salesforce Specialist / Marketing Analyst**

Patch of Land | Sherman Oaks, CA

06/2019 – 03/2020

- Created and managed reports and dashboards for the Sales and Marketing departments to assist Executives with tracking and reporting of key performance measures, lead generation, and the sales pipeline.
- Conducted detailed campaign performance analysis on return on investment (ROI) and reconciliations.
- Managed Salesforce Data (mass import/export/update/delete, defining validations, and implementing duplicate management using applications such as DemandTools and Dupeblocker).
- Automated business processes leveraging Workflows, Process Builder, and Flow for increased efficiency.
- Supported the Salesforce environment, including integrations with 3<sup>rd</sup> party business tools and applications such as Salesloft, Nintex DocGen, Pardot, Zapier, & telephony systems.
- Implemented Salesforce integration with Salesloft and managed user adoption (troubleshooting, dashboard customization, training, & consulting).
- Managed user setup, profiles, field creation, page layouts, permissions, and applications in Lightning.
- Provided training, troubleshooting, new release communication, and end-user support to 60+ users in Salesforce.
- Worked directly with business partners and key stakeholders to understand and implement requirements, while adhering to best practices.
- Data Migration (from NOVA to Salesforce).

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**Finance & Accounting Associate**

Multiplex Business Enterprises, Inc. | Northridge, CA

01/2017 – 06/2019

- Supported Sr. Accountant in financial reporting including accounts payable, receivables, and aging.
- Processed vendor bills, payments, and invoices.
- Handled payroll through ADP.
- Managed purchase orders, office procurement, and financial/expense reporting.
- Reconciled and updated account balances using QuickBooks Pro.

**Customer Service Rep.**

Bank of America | Simi Valley, CA

08/2016 – 06/2019

- Processed front-line teller transactions while maintaining accurate cash flow, accounting, and financial records.
- Advised clients with recommendations to leverage technological products for efficient and streamlined banking; provided exceptional client service with a high sense of urgency.
- Identified and mitigated risk, especially during times of increased client interaction at a high-risk Financial Center; as well as leveraged customer cues to generate new and incremental business.

**Bank Teller**

Wells Fargo | La Jolla, CA

02/2015 – 08/2016

- Engaged clients to discover financial needs and strengthen customer relationships.
- Identified cross-selling opportunities and generated sales leads using in depth knowledge of bank products & financial services & consecutively exceeded sales quota for 4 quarters.

**Public Relations Associate**

Dorsee Productions | Rancho Santa Fe, CA

06/2015 – 12/2015

- Acted as the primary liaison within a network of business professionals and political affiliates.
- Raised \$500K in congressional fundraising and organized State Assembly marketing campaigns.
- Maintained file systems for accounting records for funds, programs, and activities involving multiple transactions and stakeholders.
- Drafted correspondence and reports; served as focal point for all office correspondence (approx. 100 contacts/day).
- Managed invitee lists, vendors, purchase orders, sites, volunteers, and other event planning components.
- Communicated on strategy for lead generation to ensure turnout at events and timely completion of ongoing projects.
- Coordinated with government officials' security detail for preparation of their emergency action plan.

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**SKILLS**

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| <ul style="list-style-type: none"><li>• Cost analysis and reduction</li><li>• Financial analysis &amp; strategic planning</li><li>• QuickBooks Pro</li><li>• Salesforce Sales Cloud</li><li>• MS Office: Word, PowerPoint, Excel (vlookup, formulas etc.)/G Suite</li></ul> | <ul style="list-style-type: none"><li>• Qualtrics, ArcGIS, PeopleSoft, SharePoint, SPSS, &amp; GAAP</li><li>• Scrum/Agile based project management in iterative environment</li><li>• Kanban based project management using Trello and Asana</li><li>• Independent worker able to handle high levels of ambiguity</li></ul> |
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**INTERESTS/HOBBIES**

- Avid runner having competed in multiple marathons
- Enjoy kickboxing, basketball, and tennis
- Love to read, travel, and cook