

## Professional Summary

Results-driven, user-centric, and dynamic certified Salesforce Administrator with 12+ years of experience managing and optimizing Salesforce ecosystems. Expert communicator, expert at overseeing complex Salesforce implementations, customizations, and integrations to drive organizational growth and streamline processes. Skilled in user training, data management, and ensuring data security. Stickler for Best Practices.

## Work Experience

### **PamTen, Inc. – Contract Work, February 2025 – Present**

#### **Financial Partner - Commonwealth Financial Network – (Remote)**

Salesforce Administrator, Financial Services Cloud

- Led an extensive data hygiene initiative in preparation for implementing Fintrx integration
- Troubleshoot and resolved complex bug tickets, collaborating with end users and stakeholders to identify root causes and implement effective solutions.
- Implemented and optimized Geopointe to enhance location-based data analysis, improving routing efficiency and field operations.
- Worked closely with the DevOps team to deploy enhancements, ensuring smooth release management and minimizing system disruptions.
- Streamlined issue resolution by documenting recurring bugs and implementing proactive solutions to reduce future system errors.
- Configured and customized Salesforce to support business needs, integrating third-party applications and automating workflows..

**Platforms/Processes:** Financial Services Cloud, Jira, Account Engagement (Pardot), Fintrx, Geopointe

### **iO Associates: Cloud Technology Staffing Specialists – Contract Work, November 2023 – November 2024**

#### **Law Firm - (Remote)**

Salesforce Administrator, Litify (Managed package for law firms)

- Developed and tested 75+ integrated Jotform arbitration and class action forms, streamlining intake for potential plaintiffs and enhancing data collection efficiency.
- Migrated 25 complex workflows and processes to Salesforce Lightning Flow, improving automation and reducing manual effort across the organization.
- Implemented GRAX backup, recovery, and archive platform, significantly reducing storage usage by optimizing data retention and backup strategies.

**Platforms/Processes:** Litify Managed Package for Law Firms, Jotform, GRAX Backup/Restore/Archive, Airtable

#### **Insurance Partner - Hancock Consultants – (Remote)**

Salesforce Administrator, Field Service Lightning Implementation

- Played a pivotal role in rescuing a delayed Salesforce Field Service Lightning (FSL) implementation for an insurance partner, following poor execution by a previous consultancy.
- Collaborated closely with the Salesforce DevOps Manager to assist with Copado deployments, troubleshoot errors, and ensure seamless release management across environments.
- Conducted thorough research and developed User documentation on Persona Permissions, a Copado cheat sheet, and all functionalities of Field Service Lightning, a new application for the company and team.
- Tackled in-depth research and resolved large backlog of critical bugs quickly for the new Field Service Lightning implementation, ensuring the application was delivered on time and met all functional requirements.

**Platforms/Processes:** Field Service Lightning (FSL), DevOps: Jira, Copado CI/CD (with Git), BitBucket, Communities/Experience Cloud, Agile and Scrum Methodology

### **SkySpecs (Remote) October 2022 – August 2023, Green Energy Startup**

Senior Salesforce Administrator, Sales Cloud (Enterprise Edition, 217 Users) Revenue Operations: GTM Team

- Led the successful implementation of FieldFX, a field service managed package alongside vendor, including significant customization and configuration of mobile app, welcoming 100 field service users into Salesforce.
- Spearheaded upgrade of Ironclad system from legacy version to current version and enriched Salesforce with additional data points, substantially improving visibility of contractual statuses and approvals.

**Platforms:** Sales Cloud, FieldFX, HubSpot, Workato, Ironclad, Copado, Declarative Lookup Rollup Summaries

### **Stord (Remote) February 2022 – August 2022; Supply Chain Startup**

Senior Salesforce Administrator, Sales Cloud, Service Cloud, (Enterprise Edition, 250 Users)

- Tackled/completed large backlog of enhancement and automation requests including expanding CPQ and data enrichment for greater automation, improving the user experience and reporting by 40%.
- Prioritized the onboarding of new users to access all associated platforms.

**Platforms:** Sales Cloud, Service Cloud, DealHub CPQ, Zoominfo, Gearset, Groove, LinkedIn Sales Navigator, 6sense, and HubSpot.

### **Cofense (Remote) April 2020 – February 2022; Cybersecurity**

Sr. Salesforce Automation Systems Administrator, Sales Cloud (Performance Edition; 280 Users)

- Built a CPQ solution using Lightning Flow, to allow Sales to build product bundles for a year while preparing to move to a CPQ platform when the product offerings expanded.
- Led weekly governance sessions to review requests, discuss data integrity issues, and develop solutions, all to improve the user experience and reporting metrics by 40% each week.

**Platforms:** Sales Cloud, DealHub CPQ, Zendesk, Archiver, Ironclad, Outreach, Conga, LinkedIn Sales Navigator, ZoomInfo, Marketo, HubSpot, Clari, Outpost, Ownbackup

### **Total Administrative Services Corporation (TASC) (Remote) May 2019 – April 2020; Administrative Services**

Sales System Administrator – Sales Cloud, Service Cloud, HubSpot, Formstack (Enterprise Edition, 160 Users)

- Administered all Digital Sales Systems including Salesforce, HubSpot, Formstack, & Formstack Documents.
- Implemented Cases (including email to case) for internal support and enhancement management.

**Platforms:** Sales Cloud, GOVWIN, Service Cloud, HubSpot, Formstack, Formstack Documents

### **Salesforce Consulting (Independent, various consulting firms, and clients), (Remote) October 2015 – May 2019**

Salesforce Consultant for several small to large businesses, and nonprofits (Independent Contractor)

- Executed new instances of Salesforce and enhancements, including managed packages, marketing automation, digital experience/communities, and data cleansing/migration.
- Configured Salesforce to align with clients' business processes, including custom objects, fields, workflows, processes, flows for all automation requirements.

### **Houghton Mifflin Harcourt Publishers, April 2015 – October 2015 | Boston, MA; Publishing**

Senior Technical Analyst – Salesforce (Unlimited edition, Sales Cloud, Service Cloud, 5,000 Users)

- Administered and completed a large backlog of salesforce technical enhancements and support cases for internal clients reducing the list to less than half.
- Directed and built out the development of a new case management initiative that was completed ahead of time for the program launch.

### **John Hancock Financial Services, July 2014 – April 2015 | Boston, MA; Financial Services**

Senior Business Systems Analyst – Salesforce (Unlimited edition, Sales Cloud, Service Cloud, 300 Users)

**Tekscan, May 2012 – July 2014 | Boston, MA; Manufacturing**

Salesforce Administrator – Salesforce (Enterprise edition, Sales Cloud, 55 Users)

**Education/Certification**

- Salesforce Administrator Certification (ADM201) (10/2013)
- Platform App Builder Certification (CRT-402) (11/2024)

**Trailhead Rank:** Double Star Ranger

**University of Massachusetts Lowell,** Lowell, MA, BLA in English and Legal Studies (cum laude)

**Technical Proficiencies:** CRM, Salesforce.com: Service, Sales Cloud: Reports and Dashboards Proficiency, Salesforce Screen, Trigger, Scheduled, Auto-Launched, Lightning Flows, App Builder; customization of Lightning Components; CPQ (DealHub), DemandTools, Marketo, HubSpot, Account Engagement (FKA Pardot), 6sense, Outreach, LeanData, LinkedIn Sales Navigator, Chorus, Loopio, Formstack, Formstack Documents, FormAssembly, Lucid Chart, Workato, Jotform, Excel Connector, Declarative Lookup Rollup Summaries (DLRS), Rollup Helper, DocuSign, Ownbackup, GRAX, Jira, Confluence; Adobe Suite, DevOps CI/CD: Azure Devops, Gearset, Copado, BitBucket, Git; ZoomInfo, Asana, DemandTools, DataLoader/Dataloader.io, Salesforce Inspector, Workbench; SOQL, SOSL, SQL, REST API, HTML, CSS; JavaScript; MSOffice Office: Office 365, Excel, Word; G-Suite, Agile, Scrum SDLC, and a basic understanding of Apex/Visualforce.