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## Karen Spence

Chelmsford, MA  
kpjs@comcast.net  
www.karenspace.net  
(617) 480-5838



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

## SALESFORCE EXPERIENCE

### All Salesforce positions involve(d):

- Administer Sales Cloud, Service Cloud, Integrated Platforms, AppExchange apps, & Managed Packages
- Design innovative solutions, streamlining and improving user workflows, & enhancing data management
- Set up security settings including roles, permission sets/groups, profiles, public groups, OWD, and sharing rules.
- Build data fields and optimize page layouts, including dynamic layouts.
- Data integrity: Facilitate data hygiene, data migration via tools like Demandtools and Data Loader.
- Automate processes with Lightning Flow.
- Manage sandboxes and release management.
- Provide end user support, user acceptance testing, & training documentation.
- Create/optimize analytics - reports and dashboards.
- Proactively analyze the platform for opportunities to develop improvements.

## WORK EXPERIENCE

### Salesforce Consulting - Freelance (Remote) August 2023 – Present

- Currently leading a new implementation of Salesforce Field Service Lightning (FSL) for an insurance partner.
- Directing org consistency, permissions accuracy, sharing settings and sets for internal, mobile, and portal users.
- Researching and developing documentation on Copado, SMS implementation, proper user licensing, and all functionality of Field Service Lightning as this application is brand new to the company and team.
- Reviewing existing flows and offering suggestions for consolidation to reduce tech debt.

### 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 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.

**Skills/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.

**Skills/Platforms:** Salesforce, 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 out 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.

**Skills/Integrated Platforms:** 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.

**Skills/Platforms:** Salesforce, 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 Analyst – Salesforce (Unlimited edition, Sales Cloud, Service Cloud, 300 Users)

- Stepped in and resolved integration issues for a business unit after weeks of daily delta failures from inception; became go-to person for all integration issues.
- Led the seamless implementation and early completion of a business unit's migration from Smart Office to Salesforce for 24 new users, allowing extensive training for all users prior to the scheduled launch.

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

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

- Led the customization of the Opportunity Object along with consultant to ensure it aligned with company's unique sales process.

## EDUCATION/CERTIFICATION

**Salesforce.com** - Salesforce Administrator Certification (ADM201)

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

**Trailhead Rank:** Expeditioner

**Additional Technical Proficiencies:** Stickler for Best Practices, CRM, Salesforce.com: Service, Sales Cloud, CPQ (DealHub & Salesforce CPQ), DemandTools, Marketo, HubSpot, 6sense, LinkedIn Sales Navigator, Chorus, Formstack, Formstack Documents, FormAssembly, Workato, Declarative Lookup Rollup Summaries (DLRS), DocuSign, Ownbackup, Archiver; DevOps CI/CD pipeline tools: Gearset, Copado; ZoomInfo, JIRA, Asana, SOQL, SQL, REST API, HTML, CSS; JavaScript; advanced Excel skills, Word; G-Suite, Agile, Scrum SDLC, and a basic understanding of Apex and Visualforce.