

Salesforce Application Architect and Process Improvement Specialist

10+ Years Experience - Wharton MBA

Process Improvement Transformation

- Led an enterprise-wide Salesforce implementation, architecting a contract approval, spend tracking and invoicing system (\$650K value), reducing wait times by ~85% and saving ~7,000 human hrs/yr.
- Designed and implemented a scalable Revenue Operations platform on Salesforce Lightning, leveraging custom components and automated workflows to reduce processing time for sub-\$1000 transactions by 80%.

Cross-Functional Stakeholder Leadership

- Aligned executive team on an implementation plan within 7 hours of Tipping Point's commitment to the 2017 North Bay Fire Relief. Delivered a payment channel within 24 hours; days before our partners Salesforce.org and Twilio did so.
- Led discovery, prototyping and delivery for tooling across 15 non-profit and wealth management firms, providing change management with stakeholders across each firm. Two-time speaker on process automation at Dreamforce.

PROFESSIONAL EXPERIENCE

Tipping Point Community - Technology Manager

Jan 2021 - Present

As the Technology Manager at Tipping Point, a fundraising and grantmaking organization dedicated to ending poverty in the Bay Area, I oversee hardware, cybersecurity, and business systems. My work spans all functional areas, co-designing processes and deploying systems that equip Tipping Point to radically reduce poverty in the Bay Area.

- Architected and deployed an end-to-end Salesforce expenditure approval system, integrating DocuSign to replace manual paper processes. Led change management and user training, resulting in successful shift across departments for managing \$42M annual spend.
- Architected and implemented a Salesforce event management solution for annual Benefit fundraiser (\$10-15M, 50% of annual revenue), integrating table sales and guest operations. Enabled real-time revenue projections through custom dashboards, providing development team with live ticket sales analytics and night-of donation forecasting.
- Led development of custom Tableau-Salesforce integration for our grantee performance analytics, managing a team of seven Visa technologists. Designed dashboard architecture to measure investment impact and outcomes, enabling data-driven decision making for grant portfolio.
- Architected a grantee lifecycle management system, streamlining pipeline development, due diligence, renewal and exit processes. This end-to-end solution facilitated the onboarding of 82 new grantees and managed \$21M in new grantmaking for the San Francisco Housing and Youth Homelessness initiatives.

Tipping Point Community - Systems Administrator

Jan 2017 - Dec 2020

- Led the implementation of the first cryptocurrency donation channel in a national fundraising event. Cryptocurrency has contributed \$1M every year towards Tipping Point's grantmaking budget from 2018 to 2023.
- Led the migration from on-premises infrastructure to a fully cloud-based environment that leverages AWS EC2, S3 and Directory Service. This enabled a seamless transition to a remote working environment at the onset of the pandemic.

Platform Operations Consultant - Bluewolf (now IBM) | Independent

Apr 2011 - Dec 2016

Architected and delivered six enterprise-scale Salesforce implementations across 15 clients, specializing in complex CRM/ERP solutions. Established best practices for development, user adoption, and system maintenance, through integrated product, training, and support frameworks.

EDUCATION

M.B.A. Strategic Management - University of Pennsylvania, Wharton School for Executives

Aug 2020 - Aug 2022

B.S. Industrial Engineering and Operations Research - University of California, Berkeley

TECHNICAL SKILLS

Salesforce Certified Application Architect: Data Architect | Developer I | App Builder | Sharing and Visibility Architect

Programming: Apex, Lightning Web Components, Visualforce, JavaScript

Project Management: Project Management Professional, Certified ScrumMaster (CSM)