Christopher Solórzano

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About Me

Certified Salesforce Developer and Administrator with 8+ years of experience designing, building, and operating production Salesforce systems in regulated environments. Specializes in data modeling, declarative automation, security design, and reporting architectures that replace manual, high-risk processes with deterministic, auditable workflows. Experienced in translating loosely defined business and regulatory requirements into normalized object models, Flow-driven automation, and analytics that support scale, enforce policy, and maintain data integrity across enterprise platforms. Proven background supporting 100+ financial services professionals and staff new business, service operations, compliance workflows, onboarding, training, and platform governance.

Experience

Media & Research Membership Representative — Nielsen
Tampa, Florida (Remote) — 2025-Present

- Represent Nielsen as a brand ambassador in the field, upholding ethical standards and strengthening the company's reputation within local communities.
- Recruit, enroll, and maintain relationships with diverse households to participate in Nielsen's audio measurement programs, ensuring accurate representation of listening behavior.
- Educate participants on the purpose and value of Nielsen's audience measurement system, building trust and engagement through clear communication and professionalism.
- Collect and verify demographic information, ensuring integrity and confidentiality of participant data.
- Deliver regular progress reports and insights to management regarding field performance, recruitment results, and equipment functionality.

Technology & Education Director / Associate — Founders Financial Securities
Towson, Maryland — 2017-2024

- Led the full Salesforce discovery and implementation lifecycle across multiple financial advisor firms, serving as the primary consultant responsible for requirements gathering, solution design, configuration, testing, deployment, and post-implementation optimization.
- Conducted structured discovery sessions, workflow walkthroughs, and documentation reviews with advisors, operations, compliance, and leadership teams to elicit business and regulatory requirements.
- Authored clear, consistent, and unambiguous business requirements, functional specifications, and process documentation to guide configuration, development, training, and user acceptance testing (UAT).
- Applied dimensional thinking to solution design by evaluating user needs, regulatory obligations, system limitations, integration dependencies, and long-term scalability when making trade-off decisions.
- Configured Salesforce to support both standard and non-standard business requirements, including onboarding, licensing, compliance workflows, recruitment, and case management.
- Led and executed UAT, validating system behavior against documented requirements and coordinating issue resolution prior to production release.

- Delivered end-user training, executive presentations, and system demonstrations to drive adoption, clarify system behavior, and align stakeholders on solution outcomes.
- Served as the enterprise technology subject matter expert and administrator post-implementation, independently managing enhancements, production issues, and continuous improvement initiatives in Salesforce, financial planning systems, compliance tools, reporting software, and document management platforms.
- Designed and deployed hundreds of dashboards and advanced custom reports, empowering leadership with actionable insights into KPIs, compliance, and sales performance.
- Configured and maintained Salesforce integrations with DocuSign, eMoney, Docupace, and Orion, optimizing advisor efficiency and the client experience.
- Managed 50+ support staff virtually and in-person on behalf of 100+ financial services professionals driving operational excellence, technology adoption, and maximizing the value and return on investment of enterprise technologies.

Senior Account Manager / Sales — Ebix (CRM)
Pasadena, California — 2007-2017

- Supported broker-dealers, insurance agencies, and financial institutions using SmartOffice CRM by gathering requirements, configuring workflows, and aligning systems with insurance distribution, licensing, and compliance processes.
- Licensed in the State of California to sell Life and Health insurance while supporting insurance-focused CRM implementations and client engagements.
- Conducted client discovery sessions and system walkthroughs to translate insurance-related business needs into CRM configurations and reporting solutions.
- Partnered with compliance and operations teams to align CRM workflows with licensing, registration, supervision, and audit-readiness requirements.
- Delivered client training sessions, demonstrations, and presentations—both in-person and virtual—to ensure clear understanding of system functionality and adoption.

Certification / Education

- Salesforce Certified Platform App Builder - Certification ID 7381101 (2026)
- Salesforce Certified Administrator - Credential ID 5215769 (2024)
- FINRA Securities Industry Essentials Certification (2024)
- California Life, Accident, and Health Insurance License - # 0H90266 (2012 - 2014)
- California State Polytechnic University, Pomona (2002-2007)

Skills:

- CRM: Salesforce, Redtail, SmartOffice, Wealthbox, SAP, Zoho, Service Autopilot
- Salesforce Tools: Sales Cloud, Service Cloud, Flow, Sandboxes, Data Import Wizard, Data Loader, Pardot, Einstein Analytics
- UI Architecture: Lightning App Builder, Dynamic Forms, Conditional Visibility, Record Page Design
- Data Management: Tableau, Power BI, Excel, Docupace
- Financial Reporting: Orion and Morningstar
- Financial Planning: eMoney Advisor
- Accounting: QuickBooks

Languages:

- English
- Spanish