Christopher Solórzano

323-646-6351 hellochrissolorzano@gmail.com Baltimore, Maryland

About Me

Certified Salesforce Administrator with proven expertise in Salesforce configuration, administration, automation, reporting, and system integrations. Skillful in translating business requirements into scalable Salesforce solutions that improve efficiency, compliance, and user adoption. Recognized for mastering full technology ecosystems—including financial planning, accounting, CRM, compliance, digital signature, and audio and video tools—demonstrating the ability to rapidly learn, optimize, and integrate new technologies. Bilingual (English/Spanish) with a successful track record of creating dynamic and targeted dashboards, and supporting broker-dealers in the financial services industry.

Experience

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

Key Responsibilities:

- Represented Nielsen as a brand ambassador in the field, upholding ethical standards and strengthening the company's reputation within local communities.
- Recruited, enrolled, and maintained relationships with diverse households to participate in Nielsen's audio measurement programs, ensuring accurate representation of listening behavior.
- Educated participants on the purpose and value of Nielsen's audience measurement system, building trust and engagement through clear communication and professionalism.
- Collected and verified demographic information, ensuring integrity and confidentiality of participant data.
- Delivered 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

Key Responsibilities:

- Served as the primary Salesforce Administrator for multiple financial advisor firms, managing daily platform operations, security settings, user roles, and data integrity.
- Created and maintained custom objects, workflows, validation rules, record types, Lightning pages, and approval processes to streamline business operations.
- Designed and deployed hundreds of dashboards and advanced custom reports, empowering leadership with actionable insights into KPIs, compliance, and sales performance.
- Developed automated workflows and flows for advisor onboarding, licensing compliance, and digital signature tracking, reducing manual effort and errors.
- Conducted data hygiene and deduplication efforts on legacy data systems while partnering with enterprise owners to improve accuracy and reliability of compliance and records.
- Configured and maintained Salesforce integrations with DocuSign, eMoney, Docupace, and Orion, optimizing advisor efficiency and the client experience.

- Authored business requirement documents, led user acceptance testing (UAT), and managed post-implementation enhancements for new Salesforce features.
- Provided end-user training and support (onsite and virtual) for 100+ financial advisors, driving technology adoption and maximizing the value and return on investment of Salesforce and related technologies.
- Administered and customized the Salesforce Mobile App, enabling secure and intuitive access to dashboards, reports, and accounts for "mobile-first" users.
- Mastered the firm's full technology platform, including Salesforce, financial planning systems, compliance tools, reporting software, and document management platforms; became the go-to technology expert for cross-enterprise solutions.
- Designed and delivered compliance training programs, boosting digital adoption of regulatory tools by 400% and mobile compliance usage by 250%.

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

Key Responsibilities:
- Supported broker-dealers, insurance agencies, and financial institutions in customizing and configuring technologies for compliance, marketing, and communication reporting systems.
- Delivered training sessions in-person, virtually, and via recorded video, ensuring successful adoption opportunities.
- Partnered with compliance teams to align CRM workflows with licensing, registration, and audit readiness requirements.
- Built and maintained client relationships, offering ongoing CRM administration support, troubleshooting, and custom solution design.
- Mentored and trained sales associates while presenting technical demonstrations to enterprise clients across North America.

Certification / Education

- Salesforce Certified Administrator - Credential ID 5215769 (2024)
- FINRA Securities Industry Essentials Certification (2024)
- California State Polytechnic University, Pomona (2002-2007)

Skills:
- CRM: Salesforce, Redtail, SmartOffice, Wealthbox, SAP, Zoho, Service Autopilot
- Salesforce Tools: Sales Cloud, Service Cloud, Pardot, Einstein Analytics, Flow
- Data Management: Tableau, Data Import Wizard, Data Loader, Power BI, Excel,
- Development & Integration: Lightning Components, API Integrations
- Financial Reporting: Orion and Morningstar
- Financial Planning: eMoney Advisor
- Accounting: QuickBooks

Languages:
- English
- Spanish

Portfolio   Trailhead Profile   Schedule Meeting