Christopher Solórzano

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About Me

A detail oriented and tech savvy certified Salesforce professional with a strong background in administration, project management, marketing, and digital technology solutions. I have extensive experience supporting financial advisors, insurance agencies, tax professionals, and broker-dealers in managing their day-to-day operations, supporting cross-functional teams, and leveraging systems and technologies to streamline workflows and automations.

Fluent in both English and Spanish, I am skilled in a variety of CRMs, enterprise technologies, and key activity and performance indicators to support data-driven decisions.

Experience

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

Key Responsibilities:

- Managed comprehensive technology training and education programs for over 100 financial advisors, improving operational efficiency and technology adoption across the enterprise.
- Advised and trained business owners on the effective integration of CRMs, paperless systems, secure digital records, financial planning software, two-factor authentication, and more to ensure secure and efficient technology use.
- Transformed statistical data into easily digestible visual illustrations for non-technical colleagues, using Salesforce and other technologies.
- Developed and delivered impactful training sessions and conference presentations on technology adoption, data gathering, and analysis, underscoring their importance in business growth, scale, succession, sales, marketing, and accounting.
- Successfully led the transition, training, maintenance, and configuration for a secure digital forms library and a signature platform, including the implementation of automated quality controls.

Salesforce Responsibilities:

- Managed day-to-day administration of Salesforce for multiple financial service advisor firms, providing technical support to staff and ensuring seamless platform operation.
- Created templates for hundreds of custom Salesforce dashboards and reports to promote strategy and goal development using visual illustrations.
- Developed comprehensive training materials and delivered Salesforce training to financial advisors and staff, facilitating successful migration of legacy databases.
- Optimized Salesforce data management processes, improving measurement and forecasting accuracy across customer service, sales, compliance, and data security.
- Designed and implemented connections between sales Leads and Campaigns to analyze marketing, assigned resources, and service levels.
- Championed data-driven decision-making by leveraging Salesforce historical and forecasting data into strategies and growth models.
- Configured Salesforce data integrations with financial services technologies eMoney, Docupace, Orion, and DocuSign.
- Created business requirement documents for transitioning, migrating, and automating business processes, ensuring smooth implementation and onboarding of new protocols and solutions.
- Automated regular audits and data analysis, driving continuous performance improvements.
- Configured the Salesforce mobile experience for secure accessibility and simple usability.

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

Key Responsibilities:
- Developed lasting relationships with thousands of new clients, including small business owners and large corporations.
- Maintained and grew successful partnerships with existing customers, contributing to long-term customer loyalty and retention.
- Led client training and education initiatives, ensuring clients maximized the use and value of CRM solutions.
- Supervised and mentored a dynamic team of new sales associates, fostering team performance and development.
- Executed high-impact sales campaigns across North America, requiring extensive travel to drive business expansion.
- Played a key role in increasing client adoption and satisfaction through strategic account management and personalized support.

Highlights Include:
- Consistent year-over-year leader in financial technology sales, exceeding performance targets.
- Regularly surpassed new user adoption benchmarks.
- Delivered presentations to large audiences, strengthening relationships and accelerating sales growth.

Certification / Education

- Salesforce Certified Administrator (2024)
- Securities Industry Essentials (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
Data Management: Data Import Wizard, Data Loader, Power BI, Excel, Tableau
Development & Integration: Lightning Components, API Integrations
Financial Reporting: Orion and Morningstar
Financial Planning: eMoney
Accounting: QuickBooks