

Pre-Screening Questionnaire:

Basic Information:

1. *What are your most important professional core values and why?*
 - a. Opportunities to learn more about Salesforce and how to be a better Salesforce Business Analyst & Admin. I prefer to work with companies that invest and train their employees to be the best in the Salesforce Ecosystem.
 - b. Through growing and learning from mistakes this is what makes a Salesforce Superstar/"Awesome Admin".
2. *What does your ideal next company look like?*
 - a. A company that encourages transparency between employees, management, and clients to promote project success.
 - b. An organization focused on teamwork to add value to their client's business applications.
3. *What is your ideal next role, describe?*
 - a. To be the authority in leading Salesforce Projects
 - b. To research, report, consult, and configure on Salesforce Best Practices in helping Salesforce Customers' User Adoption
4. *Have you ever worked for a consulting company in a client facing role before?*
 - a. Yes
5. *Do you have any concerns working for a consulting company?*
 - a. No
6. *For your next project, what role would you prefer to play, describe?*
 - a. Salesforce Business Analyst related to demonstrate how I can gather requirements, configure, deliver, and make the client happy. Then move forward towards possibly leading a team and sharing my successful techniques.
 - b. Becoming the authority on all Salesforce Configurations
7. *Describe how you bill or logged your time in previous roles? (i.e. logged 40 hours per week for one project; long only what the task effort was, never logged time etc.)*
 - a. Time in the past has been logged through project management software such as Task Ray, Asana, or Jira where the task is billed in 15 minute intervals and placed directly into the project. This allows more accurate project reporting and billing.
8. *Tell me why you are a high performer?*
 - a. "Failure is not an option!" stated Gene Kranz
 - b. All situations have a positive happy ending where everyone wins, our job is to be a detective and reveal the path to success for everyone.
9. *What else should we know about you?*
 - a. I am a lifetime learner with Salesforce as my hobby
 - b. I work hard and play hard- I know when to work efficiently or bike effectively! How to give my wife and kids the appropriate amount of attention, as well as my clients.
 - c. I consider myself a expert juggler & I wear many hats.
10. *What questions or concerns would you like us to address during the interview process?*
 - a. Project details
 - b. Start date
 - c. Major deliverables, expectations, and user stories.
 - d. Would you be open to the idea of "try me before your hire me". We can do a prorated rate as a 1099 straight freelancer without any commitments.

Project Information

In the past 2-3 years, please describe 3 or more Salesforce projects you led or were part of.

Notes: Fill out all information requested below to be considered for role. Please copy/paste additional project sections as needed.

- *How many implementations have you led in the last 2 years?* 4
- *How many projects have you been a resource on in the last 2 years?* 4

Project 1

- Description of project: Classic to Lightning Migration
- If a functional resource, what did you build? Lightning Record Pages based on client requests and XL Spreadsheets
- If project manager, where you responsible for complete budget oversight? Yes, I had 40 hours budget and I delivered within 36 hours including testing
- Project management methodology (e.g., Agile, Waterfall): Agile- constantly changing scope and updating tasks to fit client's changing needs
- The size of project in \$: 12,000
- Start date and duration of project: March 2020- April 2020 3 months
- List the other team members and their role: Developer
- How would the Project Manager or Executive Sponsor rate your performance (on a scale of 1-10) and why? 10- my motivation and perseverance to complete the project on time according to the specifications. I was always seeking the best Salesforce Practices in delivering the project. The goal was to have the end user have a simple transition and User Interface.
- Where did you excel? Business Analyst and Configuration
- What could you have done better? Corona effected the communication a bit and pushed some milestones back

Project 2

- Description of project: Salesforce New Implementation
- If a functional resource, what did you build? Yes- Custom Objects- Master detail relationships and customized reports- architecture
- If project manager, where you responsible for complete budget oversight? yes
- Project management methodology (e.g., Agile, Waterfall): Waterfall
- The size of project in \$: 10,000
- Start date and duration of project: Oct-Nov 2019 2 months
- List the other team members and their role: none
- How would the Project Manager or Executive Sponsor rate your performance (on a scale of 1-10) and why? 10 Very committed and dedicated to discovering how the company's data could better organized in Salesforce
- Where did you excel? People Skills and configuration- this project actually helped me with key architectural Salesforce Concepts that helped me pass the App builder Exam
- What could you have done better? I wish that the company involved the Salesforce Account Executive sooner so that all the features and limitations of Salesforce would have been on the table at the beginning of the project

Project 3

- Description of project: Quickbooks to Salesforce Automation via Zapier
- If a functional resource, what did you build? Yes- automation that updates custom fields in Salesforce. When a new invoice is created in Quickbooks- key invoice fields were updated on the account record to allow reporting. This impacting so reports for clients whose bill is due within 30 days can be notified.
- If project manager, where you responsible for complete budget oversight? yes

- Project management methodology (e.g., Agile, Waterfall):
- The size of project in \$: 2000
- Start date and duration of project: Nov 2020 3 weeks
- List the other team members and their role: none
- How would the Project Manager or Executive Sponsor rate your performance (on a scale of 1-10) and why? 10 The project was not completed until the client was able to demo my work and the data correctly appeared in Salesforce. Ie formula fields, renewal dates, etc.
- Where did you excel?-Configuration and Organization of Data Architecture
- What could you have done better? I could have looked into the limitations of custom Fields on Quickbooks Integrations

Project 4

- Description of project: Facebook Lead Ads to Zoho Automation via Zapier
- If a functional resource, what did you build? no
- If project manager, where you responsible for complete budget oversight? no
- Project management methodology (e.g., Agile, Waterfall): Agile
- The size of project in \$: I was a 3rd Party not privy
- Start date and duration of project: December 2020 3 weeks
- List the other team members and their role: Marketing Agency Owner
- How would the Project Manager or Executive Sponsor rate your performance (on a scale of 1-10) and why? 9- The ability to learn Zoho CRM and make recommendations
- Where did you excel? Learning a new CRM, documentation, and training to allow configurations between Facebook Lead Ads to Zoho CRM via Zapier
- What could you have done better? Understood Zoho CRMs limitation

Technical Information

Rate your abilities in each skill below according to the following:

Describe your experience for each item at that level and give an example of why you are rating yourself as such. You can talk about how many implementations you have done.

Area of Expertise	<u>Rating:</u> No experience - 0, Competent - 5, or Expert - 10	<u>Details</u>
<u>Sales Cloud end-to-end implementations</u> 10- I have lead 3 different end-to-end implementations using Salesforce Best Practices to allow users to manipulate their data for better reporting & gain insights into their business processes	0 1 2 3 4 5 6 7 8 9 10	

<i>Service Cloud end-to-end implementations</i> 10- I have lead 2 different end-to-end implementations using Salesforce Best Practices to allow users to use Live Chat, Service Cloud and even connect community cloud	0 1 2 3 4 5 6 7 8 9 10	
<i>Experience Cloud end-to-end implementations</i> 10- I have lead 2 different end-to-end implementations Customizing components to expose data from the Salesforce Org to the community page	0 1 2 3 4 5 6 7 8 9 10	
<i>Automation: Workflow</i> 10- I have worked on 2 projects and I understand how and when to use process builder, workflow rules, or to configure a lightning flow. I understand how they can function together or independently and their limitations	0 1 2 3 4 5 6 7 8 9 10	
<i>Automation: Formulas</i> 10- I have had 3 projects where I took specifications and converted them into fields that manipulated data based on what Salesforce can do or not do	0 1 2 3 4 5 6 7 8 9 10	
<i>Automation: Process Builder</i> 10- I have had 3 projects configuring automation and even trigger a flow or even post on a chatter post. Some projects where based on field picklist details and organizing data	0 1 2 3 4 5 6 7 8 9 10	
<i>Automation: Flows</i> 8- I have built 2 custom flows and oversaw 2 existing flows. Some where interactive others where triggered from a process builder or system event	0 1 2 3 4 5 6 7 8 9 10	
<i>Reporting & Analytics</i> 10- I have built dozens of reports that were expressed via dashboards so managers can evaluate their teams productivity in one view. I even placed these dashboards on the users homepage	0 1 2 3 4 5 6 7 8 9 10	

<i>Lightning</i> 10- I understand the benefits and limitations. Most of projects have been heavily involved with configuring using the Lightning User Interface	0 1 2 3 4 5 6 7 8 9 10	
<i>Lightning Migrations</i> 10- I led 2 end to end classic to lightning migrations. Feel free to ask more in depth.	0 1 2 3 4 5 6 7 8 9 10	
<i>Project management – Budget responsibility/oversight</i> 10- I understand how many hours a project needs to be completed in with or without buffer. I am transparent as timelines and expectations need to be shifted if they fall below scope.	0 1 2 3 4 5 6 7 8 9 10	
<i>Project management – PM tools</i> 10- I have used everything from Jira to Taskray working for many Salesforce Partners	0 1 2 3 4 5 6 7 8 9 10	
<i>Project management – On 3-4 projects I was responsible for project managing & leading a project to completion</i> I have used everything from Jira to Taskray working for many Salesforce Partners. Reporting on the likely of project deliverables within time estimated by scope	0 1 2 3 4 5 6 7 8 9 10	
<i>Gathering formal requirements</i> 10- Salesforce Business Analyst Skills- I have used my skills in about 10 different projects	0 1 2 3 4 5 6 7 8 9 10	
<i>Designing a solution</i> 10- I have experience taking requirements and translating it into a proper flow to achieve the goal. I have used my skills in about 6 different projects	0 1 2 3 4 5 6 7 8 9 10	

<p><i>Documentation (describe types)</i></p> <p>10- I have a technical writing degree and experience. I love using wire frames to present prototypes to the client so they can choose their favorites for me to configure in Salesforce. I have used my skills in about 20 different projects.</p>	0 1 2 3 4 5 6 7 8 9 10	
<p><i>Data migration/transformation</i></p> <p>10- I have been on many projects from data loader to data import wizard to easily update or delete records (by the Masses) I have used my skills in about 7 different projects</p>	0 1 2 3 4 5 6 7 8 9 10	
<p><i>Data cleanup</i></p> <p>10- XL</p> <p>I love helping clients understand which fields are phone vs calling zip codes. I have used my skills in about 12 different projects</p>	0 1 2 3 4 5 6 7 8 9 10	
<p><i>Apex/Visualforce/APIs/Webservices</i></p> <p>7- I have worked on teams that have used these custom code technologies and supported developers with appropriate requirements. I understand when to use which technology and the key differences in how data should be moved through systems</p>	0 1 2 3 4 5 6 7 8 9 10	
<p><i>Integrations</i></p> <p>10- This is an essential part of my business in connecting business apps to better use a clients Salesforce. Most of my projects have been integration related.</p>	0 1 2 3 4 5 6 7 8 9 10	
<p><i>Pardot/Other marketing automation platforms</i></p> <p>5- Competent but not one of my specialties. I have has some projects configuring Pardot to work with Salesforce</p> <p><i>Pardot and Marketing Cloud are overpriced!</i></p> <p><i>Active Campaign and Constant Contact can provide the same results for a quarter of the price</i></p>	0 1 2 3 4 5 6 7 8 9 10	
<p><i>CPQ</i></p> <p>5- Competent but not one of my specialties. I have has some projects configuring quotes and orders</p>	0 1 2 3 4 5 6 7 8 9 10	

<i>E-signature Tools (list)</i> 10- I have connected DocuSign and other signature software to Salesforce in about 5 different projects.	0 1 2 3 4 5 6 7 8 9 10	
<i>Other third party tools (list)</i> 10- I am a partner of various 3rd Party Integration Software that transmit data via API in and out of Salesforce	0 1 2 3 4 5 6 7 8 9 10	
<i>Other SF functionality (describe)</i> 10- I understand what Salesforce does or does not do Most of my projects I needed to demonstrate this in.	0 1 2 3 4 5 6 7 8 9 10	
<i>Basic solution design (data model, fields, workflow)</i> <hr/> 10- I have lead several projects that have utilized these Salesforce Features	0 1 2 3 4 5 6 7 8 9 10	
<i>Complex solution design (advanced business logic including: vf/lex/apex/integrations)</i> 7- I have worked on teams that have used these custom code technologies and supported developers with appropriate requirements	0 1 2 3 4 5 6 7 8 9 10	
<i>Translating functional requirements into a solution</i> 10- Through using various Salesforce Business Analysts skill sets I have successfully gathered requirements to deliver a finished salesforce project to the clients' liking	0 1 2 3 4 5 6 7 8 9 10	
<i>Translating business requirements into functional requirements</i> 10- Through using various Salesforce Business Analysts skill sets I have successfully gathered requirements to deliver a finished salesforce project to the clients' liking	0 1 2 3 4 5 6 7 8 9 10	

Are you willing to share examples of your work (mockups, workbooks, screenshots) related to what you have listed above?

Yes

