

CARLA ROBERTSON

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Proactive, detail-oriented **Salesforce Consultant / Developer** with 10+ years of experience optimizing business processes, architecting automation, and delivering scalable Salesforce solutions. Specialized in **Salesforce Integrations, Service Cloud, Experience Cloud (Digital Experience/Partner Portals), Pardot (Account Engagement), Flow automation, and Sales Cloud optimization** across construction, real estate, energy, and nonprofit organizations.

Expert at translating business requirements into technical solutions, improving operational efficiency, and driving user adoption through training and strategic system design. Strong background aligning technical builds with business priorities and executive goals.

CORE SKILLS

- ✓ Apex Triggers/Classes & Advanced Flow Automation skills that improve productivity and efficiency
- ✓ Deep understanding of the sales process facilitating improved conversion rates within Salesforce.
- ✓ Highly focused & results-oriented, with the capability to identify goals, prioritize tasks, and resolve issues in the early stages.
- ✓ Exceptional communication and interpersonal skills, complemented with a learner's mindset.
- ✓ Custom Lightning Components, Reports, Dashboards, KPIs & Process Optimization, Requirements Gathering & Cross-Functional Leadership, FieldFX. Familiar with SAP, NetSuite, Boomi.

PROFESSIONAL EXPERIENCE

CAMP CONSTRUCTION– Houston, TX

11/2023 to 10/2025

Salesforce Developer

- Architected, designed, and deployed advanced automation using Flows, Apex and Validation rules, supporting full lifecycle processes for Leads, Estimating, Opportunities, and Proposals.
- Built and maintained custom Lightning Components and dynamic user experiences, improving productivity for Sales, Estimators, Operations, Marketing and Executives.
- Integrated Smart Apartment Data into Salesforce, automatically generating Leads and Property Accounts, improving efficiency & data quality.
- Partnered with Marketing to implement Pardot (Account Engagement), track email engagement, and automate campaign execution.

NINE ENERGY SERVICE– Houston, TX

11/2022 to 11/2023

Salesforce Administrator

- Partnered with leadership & business units to refine business processes, ensuring system scalability and alignment with operational needs.
- Managed user roles, profiles, permissions, and advanced data operations.
- Built automation using Apex & Flow; created documentation & training materials for high adoption.
- Supported integrations from external systems ensuring seamless data flow.

CARLA ROBERTSON (CONTINUED)

VIKING SERVICE GROUP – Houston, TX
Salesforce Administrator

11/2018 to 11/2022

- Configured Salesforce users, workflows, validation rules, automation, and security controls across multiple departments.
- Evaluated and deployed AppExchange products, ensuring business alignment and smooth adoption.
- Oversaw org performance, package installations, and ongoing system enhancements.
- Created custom reporting dashboards for leadership and operational teams.

VIKING SERVICE GROUP – Houston, TX
Director of Business Development

9/2012 to 11/2018

- Led business development and operational improvement initiatives, collaborating with leadership to enhance processes and efficiency.
- Managed proposal creation, benchmarking, client engagement, and sales forecasting.
- Identified operational gaps, improved workflows, and supported continuous improvement projects.

STRATUS BUILDING SOLUTIONS – Houston, TX
Sales Manager

1/2010 to 9/2012

- Built and managed client relationships, driving consistent revenue growth.
- Delivered high-impact proposals and exceeded monthly sales quotas.
- Trained and supported sales teams in CRM usage and processes.

EDUCATION

Certified Salesforce Platform Developer I

Sales Cloud Consultant

Salesforce Administrator

University of Phoenix - Business Administration