

Carla Robertson

Professional Salesforce Consultant / Developer

“Passionate about the Salesforce ecosystem”

My standout quality compared to most Salesforce Consultants is my extensive sales background. I understand not only how to build Salesforce solutions, but also how end users think, sell, and engage with clients. This dual perspective allows me to design workflows that increase adoption, streamline communication, and directly support revenue and retention. My focus on refining processes and elevating the user experience reflects my commitment to strengthening an organization’s success at every level.



Competition

Proactive Problem Solver

- Identifies potential issues before they escalate
- Seeks opportunities for continuous improvement
- Anticipates challenges & take preemptive actions

- May focus on immediate problems only
- May not leverage data to predict future issues
- Doesn't really care about the company
- Limited scope in identifying cross-functional issues

Professional Quality

- Produces professional training materials
- Keeps proper documentation for auditing
- Adheres to Salesforce best practices

- No training documents for users to refer to
- Waiting until asked to produce documentation
- Poor attention to detail
- Cutting corners within the org

Communication

- Conducts regular meetings to access users needs
- Always happy to assist users
- Welcomes feedback & constructive criticism
- Tailors communication style to suit audience

- Doesn't consider the end users needs
- May be less responsive to ticket requests
- Not soliciting managers feedback

Out-of-the-Box Thinker

- Uses creativity
- Willing to learn new things to get the job done
- Stays up-to-date with the latest technologies

- “Old School Salesforce” techniques & methods
- “Do the bare minimum” attitude
- Missed benefits due to negligence
- Does not keep up with new technology

Strong Emphasis on Security

- Ensures data privacy & compliance
- Implements robust security measures
- Regularly conducts security audits
- Actively monitor for suspicious activities
- Keeps up with latest salesforce security features

- May overlook critical security updates
- Potential lack of awareness
- No audit checks

Efficient Process Optimization

- Streamlines workflows
- Identifies & eliminates bottlenecks
- Implements automation for repetitive tasks

- Resistant to change process improvements
- May ignore opportunities for workflow streamlining
- Limited effort in identifying inefficiencies