Connor Small

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Professional Summary

Innovative technology leader with expertise in Salesforce solution architecture & platform development, enterprise architecture, and process optimization. Proven track record in designing and implementing scalable solutions that drive operational efficiency and support business growth. Skilled in translating complex business requirements into robust technical solutions, with a focus on user experience and system integration.

Core Competencies

- Salesforce Solution Architecture, Development & Administration
- Enterprise Architecture & Solution Design
- Data Migration & Integration
- Project Management & Agile Methodologies
- Business Process Optimization
- Cross-functional Team Leadership
- Financial Services Technology

Professional Experience

The Retirement Planning Group, Leawood, Kansas

Solution Architect (05/2019 - Present)

Progressively responsible roles: Senior Operations Specialist, Operations Specialist, Operations Associate

- Architected and delivered end-to-end Salesforce solutions, encompassing custom objects, workflows, VisualForce pages, and Lightning Web Components for critical processes such as DOL Form Management, Client Agreement Generation, and Investment Account Lifecycle Management
- Optimized user experience and system functionality through strategic development of custom LWC components and intuitive interfaces, significantly enhancing efficiency in critical business operations
- Led end-to-end data migrations from various CRMs and financial reporting software, ensuring high levels of data accuracy and minimal business disruption
- Designed and implemented cloud-based solutions, transforming legacy processes into scalable, automated workflows
- Architected Salesforce data models and wrote custom AMPScript code to drive sophisticated email automation in Salesforce Marketing Cloud, enhancing marketing capabilities
- Collaborated with C-suite executives to align technology initiatives with business objectives, contributing to company growth from $800M to $2.6B AUM over 5 years
- Managed team of system administrators, fostering a culture of continuous learning and excellence in end-user support across multiple departments

Technical Skills

- Salesforce: Lightning Web Components, Visualforce, Apex, SOQL, Flow
- Salesforce Marketing Cloud: AMPscript, Journey Builder
- Web Development: JavaScript, HTML5, CSS3, Astro, Svelte, Tailwind CSS
- Tools: Git/Github, VS Code, Notion, Dropbox, Zapier

Certifications

- Salesforce Certified Data Architect
- Salesforce Certified Administrator
- Salesforce Certified Platform App Builder
- CIMBA Leadership Initiative for Excellence
- CIMBA Kepner-Tregoe Problem Solving

Education

University of Kansas, School of Business
Bachelor of Science in Finance (2015-2019)

CIMBA Study Abroad Program, Paderno del Grappa, Italy (2017)

- Global business education with emphasis on leadership and personal development

Professional Development

- Participated in Acumen Emerging Leaders Leadership Course
- Achieved 'Ranger' ranking on Salesforce Trailhead, completing 3 Superbadges and accumulating over 50,000 points
  - Completed 100+ badges, demonstrating comprehensive knowledge across various Salesforce technologies and best practices

For detailed project showcases, please visit my portfolio at connorsmall.com