

MATTY WHALLEY

Salesforce Tech Lead, Platform Ownership & Large-Scale Migration

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SUMMARY

- Twenty years of continuous, hands-on Salesforce platform depth since 2006, spanning Visualforce-era customization through to modern Lightning Web Components, Flows, and REST-based integration patterns.
- Expert in Salesforce Reports and Report Types, with numerous custom apps, plugins, and frameworks built and shipped inside Salesforce, some reaching 20,000+ users across separate client orgs.
- Led a production org migration moving more than 10 million live records and 20 million OwnBackup archived records, including Chatter and attachments, with zero disruption to business operations, and retired a legacy managed package the organization had built years of process on top of.
- 15 years supporting financial services clients directly at Tier1 Financial Solutions, spanning deployment, professional services, and strategic-projects work, with client-facing delivery across the US, UK, and Australia.
- Salesforce, HubSpot, and RingCentral subject matter expert, including a custom RingCentral Call Log integration built directly into Salesforce Tasks.
- Built and now runs a scratch org framework supporting 150 environments a day, real platform infrastructure work beyond day-to-day development.

CORE COMPETENCIES

Salesforce Platform

- Apex Development
- Lightning Web Components
- Visualforce
- Flows
- SOQL / SOSL
- Managed Package Creation

Integration & Deployment

- REST / SOAP APIs
- SFDC/SFDX Deployment API
- Dataloader
- Salesforce Digital Experiences
- RingCentral Integration

Platform Ownership

- Large-Scale Data Migration
- Platform Capacity Governance
- Scratch Org Framework Design
- Apex Test Automation
- Managed Package Retirement

Leadership & Delivery

- Team Leadership & Mentorship
- Hiring & Interviewing
- Vendor & Contract Negotiation
- Stakeholder Management
- Client-Facing Delivery (US/UK/AUS)

PROFESSIONAL EXPERIENCE

Tech Lead

Jan 2023 – Present

Zensurance | Toronto, ON (Remote)

- Completed a production org migration moving over 10 million live and 20 million OwnBackup archived records, including Chatter and attachments, into a new org with no disruption to business operations.
- Serve as the company's primary technical resource for Salesforce, monitoring platform usage and API consumption and providing alternate solutions when capacity or capability issues arise.
- Developed and implemented a scratch org framework that supports 150 environments per day.
- Provide ongoing guidance and mentorship to team members, and heavily contributed to numerous product initiatives.
- Worked closely with the business to identify requirement gaps and deliver products with heavy usage.
- Listened to user and leadership feedback to improve Salesforce processes, achieving 100% platform adoption.

Team Lead

Mar 2022 – Jan 2023

Zensurance | Toronto, ON (Remote)

- Responsible for a team of 8, using Salesforce and MERN technologies.
- Worked directly with business and product stakeholders on cross-functional initiatives.
- Assisted and monitored broker issues, and drove cross-team collaboration and knowledge sharing.

Senior Salesforce Developer

Jun 2021 – Mar 2022

Zensurance | Toronto, ON (Remote)

- Delivered Salesforce solutions using Apex, Lightning Web Components, Flows, REST, SOQL, SOSL, and Dataloader.
- Developed a custom RingCentral Call Log integration with Salesforce Tasks, attaching call records directly to the relevant record.
- Served as Salesforce, HubSpot, and RingCentral subject matter expert for the organization.
- Refactored code across the org to meet Apex best practices.

Senior Developer, Client Services

Feb 2016 – Jun 2021

Tier1 Financial Solutions | Toronto, ON (Hybrid)

- Lead developer for the Client Services team, building solutions and customizations using Apex, Visualforce, JavaScript, HTML, CSS, jQuery, and proprietary frameworks to integrate with other products.
- Mentored other developers on the team and assisted with goal setting.
- Estimated work and feasibility for new engagements, and interviewed candidates for open roles.
- Travelled to client sites in the US, UK, and Australia to support enterprise implementations.

Developer, Strategic Projects

Sep 2011 – Feb 2016

Tier1 Financial Solutions | Toronto, ON (Hybrid)

- Built marketing-exportable reports to Word and PDF using Visualforce.
- Developed solutions and applications supporting the Sales and Support phases of the client lifecycle.
- Worked closely with the CEO on company-wide initiatives.

CRM Support and Deployments

Sep 2006 – Sep 2011

Tier1 Financial Solutions | Toronto, ON (Hybrid)

- Mastered the Salesforce Deployment API, including fixing Apex Test Methods.
- Responsible for deploying managed and unmanaged code and configurations to production.
- Completed support requests with consistently high client satisfaction.

ADDITIONAL EXPERIENCE

- Customer Service Representative | ClientLogic, Toronto, ON (Sep 2003 – Sep 2005)
- Assistant Systems Administrator | ClientLogic, Toronto, ON (Sep 2004 – Sep 2005)
- Systems Administrator | ClientLogic, Toronto, ON (Sep 2005 – Sep 2006)

EDUCATION

Java, Ryerson

Sep 2010 – Dec 2010

Networking, Humber College

Sep 2001 – Jun 2003

TECHNICAL SKILLS

Apex, Lightning Web Components (LWC), JavaScript, SOQL, SOSL, HTML, CSS, jQuery, Visualforce, REST, SOAP, JSON, XML, SFDC/SFDX Deployment API, Apex Test Methods, Dataloader, Managed Package Creation, Salesforce Digital Experiences (formerly Communities), Sales Cloud, Service Cloud, Platform Unlimited and Enterprise Editions, RingCentral

BUSINESS ANALYSIS & METHODS

Team leadership and mentorship, hiring and interviewing, vendor and contract negotiation, technical program delivery, cross-functional collaboration, stakeholder management, platform capacity governance, estimation and feasibility analysis, production migration planning, client-facing delivery