

MIKE MACLEOD

Senior Salesforce Solution Architect, Financial Services Technology Delivery

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SUMMARY

- 15+ years leading technology programs on the Salesforce platform, including 8+ years of dedicated hands-on Salesforce delivery across Sales Cloud and Service Cloud implementations for financial services clients.
- Certified at the platform level: Salesforce Certified Administrator and Certified Platform Developer I (DEV 401), held since 2012, paired with a 2026 PMP certification for delivery governance.
- Delivered end-to-end system integration and data migration architecture, including a full Salesforce data migration from an acquired company and a JIRA-Salesforce integration built for unified reporting and executive dashboards.
- Designed and delivered declarative automation and marketing automation architecture, including a complete Pardot implementation and Eloqua integrations for projects up to \$1.8M.
- 1.5 years' direct technical experience on ATB's Toronto CRM as the main point of contact for Tier1 Financial, the CRM vendor.
- Delivered Phase 1 of a \$3.1M enterprise CRM rollout, on schedule and on budget, across an 18-month engagement supporting 1,800 users, and moved a flagship banking client engagement from RED to GREEN status within weeks.
- 2 years delivering Anti-Money Laundering software and analytics built on Alesia, alongside 8+ years' JIRA experience integrating with Salesforce for unified reporting and customer-facing dashboards.

CORE COMPETENCIES

Salesforce Platform Architecture	Data & Integration	Delivery Leadership	Industry & Compliance
• Solution Design & Architecture • System Integration Design • Sales Cloud • Service Cloud • Salesforce Flow / Declarative Automation • Salesforce Administration	• Data Migration Strategy • API Integration Workflows • JIRA-Salesforce Integration • Agentic AI Implementation • Reports & Dashboards	• End-to-End Program Lifecycle • Governance Framework Design • Risk & Issue Escalation • Executive & Steering Committee Reporting • Budget & Schedule Ownership	• Financial Services / Banking • Anti-Money Laundering (Alesia) • Regulatory-Aware Delivery • Vendor & Stakeholder Accountability

PROFESSIONAL EXPERIENCE

Senior Project Manager

Oct 2024 – Jul 2025

HSS Business Solutions | Toronto, ON

- Delivered an AI-powered Salesforce case-close automation using predictive analytics, saving 80 hours of labour per week.
- Designed and delivered an end-to-end Pardot implementation, including backend configuration and a complete campaign build covering marketing emails, landing pages, and lead scoring.
- Delivered a custom Salesforce customer portal integrated with a JDE inventory and supply system, saving customer service reps an average of 10 hours per rep per week.
- Built JIRA queries and dashboards that improved delivery governance by surfacing open items from past sprints and flagging work at risk of running long, giving leadership early visibility into delivery risk.
- Gathered business requirements from partners, SMEs, architects, and engineers and translated them into technical user stories and acceptance criteria.

Senior Project Manager

Jul 2018 – Feb 2024

Tier1 Financial Solutions | Toronto, ON

- Delivered Phase 1 of a \$3.1M enterprise CRM rollout on schedule and on budget across an 18-month engagement supporting 1,800 users.
- Designed and delivered dynamic customer-facing dashboards powered by custom queries, giving clients real-time visibility into project status.
- Connected JIRA tickets to Salesforce cases, allowing clients to track progress through JIRA while the internal team's Salesforce cases remained undisturbed, maximizing the value of both systems.

- Built a custom ticketing system for Barclays, the firm's flagship client, to track configuration changes, customizations, and enhancement requests, giving the client's team the visibility needed to prioritize their own requests. Moved the engagement from RED to GREEN status within weeks.
- Delivered 2 years of Anti-Money Laundering software and analytics built on Alesia, taking on projects that had already exceeded scope, budget, and schedule, and closing them cleanly with client sign-off and minimal additional effort.
- Completed a technology debt inventory for a major Canadian bank and delivered a remediation roadmap.
- Served as Scrum Master, running daily stand-ups, sprint demos, and Agile ceremonies, and mentored junior team members on delivery quality.

Senior Salesforce Admin / Solution Architect

Jan 2016 – Jun 2017

MASS Engines | Toronto, ON

- Delivered SFDC marketing automation solutions and Eloqua integrations for projects up to \$1.8M.
- Diagnosed and resolved leaks in the client's sales and marketing funnel, improving lead intake by 30%.
- Completed a full data migration from an acquired company into the client's Salesforce instance and migrated legacy users to an enhanced Partner Community, saving the client \$20,000 in license costs.

ADDITIONAL EXPERIENCE

- Salesforce Business Analyst | YP, Toronto, ON
- Salesforce Admin and Analyst / Consultant | Afiliis, Toronto, Canada Area
- Solution Architect (Contractor) | Research and Innovation Centre (RICC), Mississauga, ON
- Salesforce ADM 201 and DEV 401 Trainer | Microskills (Contractor), trained 250+ students
- Salesforce Project Manager | Independent Contractor, Toronto, ON
- Salesforce Admin / Project Manager | TigerTel, Halifax, Nova Scotia

EDUCATION

B.Sc., Dalhousie University

Dec 1988 – Dec 1992

CERTIFICATIONS

- Salesforce Certified Administrator (2012)
- Salesforce Certified Platform Developer I / DEV 401 (2012)
- PMP Certification (2026)
- Python Certification (In Progress), Coursera
- Unix System Administration Certificate, Dalhousie University (2009)

TECHNICAL SKILLS

Salesforce, Sales Cloud, Service Cloud, Salesforce Administration, Salesforce Flow, Declarative Automation, Lightning, JIRA, MS Project, SharePoint, Data Migration, Data Governance, Reports & Dashboards, System Integration, Pardot, Eloqua, Python, Microsoft Excel, Microsoft 365

BUSINESS ANALYSIS & METHODS

Requirements elicitation, Business requirements gathering, Governance framework design, Process mapping (as-is / to-be), Impact analysis, Stakeholder management, Vendor management, UAT / test execution, Client & User Onboarding, Documentation & BRDs, Presentation & demos, Agile, Scrum, Waterfall, Software Development Lifecycle (SDLC), Anti-Money Laundering compliance delivery, Budget, schedule and risk management