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Salesforce CRM Expert

I have 20+ years of experience driving business success and efficiency with Salesforce. At loanDepot, I increased first contact rate and lead conversion by 10%, launched a citizen developer program resulting in a 75% increase in no-code solutions, and boosted user adoption by 25%.

Salesforce Trailhead: www.salesforce.com/trailblazer/angelalandrith

WORK EXPERIENCE

Loan Depot • January 2021 - Present

Sr. Salesforce Product Manager

- Partnered with key stakeholders to establish a transformative Salesforce vision, driving business success and ensuring regulatory compliance.
- Elevated initial engagement and conversion rates by 10% through strategic automation of sales processes in 2023, significantly contributing to revenue growth.
- Launched citizen developer program, increased no-code adoption by 50%, and reduced project delivery time from 14 to 3 days, improving organizational efficiency and responsiveness.
- Implemented roll-out strategy, communication plans, & training for features within CRM platform. Boosted user adoption by 25%
- Guided team in developing & implementing a comprehensive Salesforce roadmap, aligning with strategic goals & industry trends.

Bank of America • January 2009 - December 2021

SVP, Salesforce Product Manager, Consumer, Lending & Investments

- Planned and executed a Salesforce strategy for 30K+ users, resulting in a digital first approach and increased efficiency within one year
- Established coherence among five business units for CRM customer interactions, enhancing the system's scalability and future adaptability."
- Streamlined Retail Mortgage workflow for regulatory compliance with 100% consent for a mortgage review discussion.

SVP, Salesforce Product Owner - Legacy Asset Servicing

- "Elevated compliance standards by reengineering the mortgage loan foreclosure process for 20,000 users over four months, leveraging Salesforce technology.
- Designed and delivered training workshops to onboard users to platform at a rapid pace to meet deadlines and 100% adoption of the new workflow.
- Streamlined Salesforce change management process by creating an intake and SDLC process, resulting in a 25% increase in efficiency and improved governance.

VP, Salesforce Product Owner Reverse Mortgage

- Revolutionized lead management for Reverse Mortgages by implementing Salesforce product, resulting in an increase in lead conversion rates.
- Created Salesforce Reporting and Dashboards to replace Crystal Report solution

EDUCATION

B.A. Political Science

University Of Alaska

CERTIFICATIONS

Salesforce Certified Associate

PROJECTS

Retail Mortgage Salesforce Transformation

During the transition of 1600 users from Service Cloud licenses to Sales Cloud, several improvements were made to the sales process. These include:

- Introduction of Sales Engagement Automation: This led to a 10% increase in the first contact rate and improved lead conversion.
- Simplification of workflow and connection of systems: This improved platform adoption and usage through a single view.
- Integration of Einstein Activity capture: This enabled automation of the process.
- Launch of a simplified mobile app: This app is focused on supporting loan officers to connect with their partners and clients.
- Integration of Production Assistants for loan officers: This was done to reduce security risks. Also, the integration with Marketing Cloud was optimized to integrate First Time Home Buyer and Credit Repair customer journeys.

Dynamics 365 CRM implementation - Direct Lending

We transferred 300 Direct Lending Officers from an in-house contact management tool to a cloud-based CRM platform that can be customized according to our needs. Additionally, we integrated both inbound and outbound calling to leads and customers from Genesys Pure Connect to Genesys Purecloud, which helped in revamping the contact center phone experience. We also designed sales automation routines to enhance the appointment-kept rates and follow-up activities.

Customer Insights in CRM - Workflow Transformation

I led the transformation of the workflow of associates from five lines of business into a single approach within Salesforce. The main goal was to optimize the experience for both the associate and the customer when they interacted, either virtually or in person within the financial center.

To achieve this, we converted from classic to Lightning Sales Console to support texting and streamline the associate workflow. We also integrated real-time customer insights into client profiles when customer accounts were accessed to drive valuable interactions and next steps.

Furthermore, I created a process for associates to follow up on items within customers' digital shopping carts to increase product sales and revenue.

Transformation of Notary Process for Financial Center

Bank of America

Led the migration from a legacy process to ensure that associates follow a compliant process for delivering notary services to customers. We created a controlled workflow through a dynamic process that is managed by business

stakeholders without requiring a technology release. We developed an innovative low code Salesforce solution that replaced a legacy application that required constant technology enhancements. This new process is more maintainable by the process stakeholders.

Consolidate Customer records between Mortgage and Banking

Bank of America

The objective was to merge the customer records of Home Mortgage with the Banking System of Record for Customers. This would result in the formation of a single customer profile for all of its 66 million clients. The purpose of this consolidation was to facilitate personalized outreach to clients and partners, by ensuring that only one mortgage loan officer can market to a customer. Additionally, the project aimed to provide visibility into all existing sales opportunities that a consumer is engaged across lines of business, in order to assist the associate in serving the customers' needs.

Single Point of Contact - Workflow Transformation

Bank of America

Led platform strategy to implement a Single Point of Contact (SPOC) model for Legacy Asset Servicing. The team had to establish a new technology to support the effort, we had to align a new business process for 26 different business areas, into this model within 120 days.

Reverse Mortgage CRM Transformation

Bank of America

The project's objective was to replace an outdated CRM system that relied on a third-party vendor with a modern Salesforce Sales Cloud solution customized for Reverse Mortgage Sales. The team successfully migrated data from the old system to the new Salesforce instance with the assistance of the Enterprise data team. In addition to that, the team conducted in-person training sessions for Reverse Mortgage Loan officers across various locations to ensure the new system's successful adoption.

It's worth mentioning that during this project, I obtained a certification as a Salesforce Administrator!

VOLUNTEERING & LEADERSHIP

Transition Trails

Founder, Executive Director

Founder of Transition Trails, a non-profit focused on consulting, mentoring and coaching people transition into a career using tools like Salesforce.

SKILLS & INTERESTS

Agile Software Development, Auto Lending, Business Analysis, Business Management, Change Management, Contact Center, CRM Strategy, Customer Relationship Management, Ensuring Compliance, Innovation, Leadership, Lead Nurturing, Marketing Automation, Mortgage Lending, Problem Solving, Process Implementation, Process Improvement, Product Delivery, Product Management, Product Management, Regulatory Compliance, Release Planning, Reverse Mortgage, Sales Automation, Salesforce Marketing Cloud, Salesforce Sales Cloud, Salesforce Sales Engagement, Salesforce Service Cloud, Sales Reporting, Citizen Development, Salesforce Careers