**Keerthi vedantam** 

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**Professional Summary**

* Over 6 years of IT experience with experience in the Salesforce.com CRM Platform both as Administrator and Business Analyst
* Good understanding of Software Development Life Cycle (SDLC), AGILE methodologies and implemented SCRUM and SPRINT techniques.
* Highly skilled in transforming the needs of business users and stakeholders to the functional/technical requirements.
* Collaborated with key personnel in analyzing business requests for feasibility and decrease in costs.
* Experience in using Salesforce.com Creating Roles, Profiles, Email Services, Page Layouts, Workflow Alerts, Actions, and Approval Processes.
* Hands on experience implementing Security/Sharing rules, configured permission sets, Field level Security, Record level Security, Profiles, Roles and resource monitoring at different hierarchical level of Organization
* Expertise in Salesforce Data Validation, Sales, Marketing, Customer Service and Support Administration
* Served as a critical resource and liaised between subject matter experts and technologists throughout the project life cycle.
* Excellent conceptual and technical skills to create Business Requirement Documents, Functional Specification Documents, Process Flow Diagrams, and Detailed Design Documents.
* Understanding of Equities and Fixed Income products with respect to Brokerage Operations, Margin trading and Securities Lending.
* Conducted Joint Application Development (JAD) Sessions with stakeholders and business partners to resolve open issues.
* Conducted analysis and evaluation of existing systems to upgrade latest versions of JIRA.

**Technical Skills**:

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| * Salesforce.com Modules | * Salesforce automation including Leads, Web to Leads, Accounts, Contacts, Opportunities, Forecasts, Contract, Partner Portal Service Cloud: Cases, Solutions, Ideas, Customer Portal, Customer Self Service Portal, Web to Case, Email to Case |
| * Salesforce Configuration | * Custom Application, Custom Objects, Field creation, Formula Fields, Page Layout creation/edition, Related List customization, Record Types, Field Level / Object Level security, Relationships among objects: Lookup/Master-Detail, Workflow rules / Triggers, Role Hierarchies, custom reports/dashboards, APEX Data Loader |
| * Tools | * MS Office Suite (Word, Excel, PowerPoint, Access, Outlook), MS Visio, SharePoint, InfoPath, Rational Suite, LoadRunner, WinRunner * Rational Clear Quest, Test Director, and HP Quality Center |
| * Methodologies | * RUP, Agile-Scrum, Waterfall |

## EDUCATION

* Master of Science in Electrical Engineering, California State University Fullerton, CA, USA

## EXPERIENCE

**Client: Equifax- Alpharetta, GA Jan 2019 – Present**

**Role: Salesforce Business Analyst/ Administrator**

**Responsibilities:**

* Worked on Agile Scrum Methodology for Salesforce implementation. Followed the iterative Agile scrum methodology throughout the SDLC – facilitated daily scrum meetings, sprint planning meetings, sprint review meetings, and sprint retrospective meetings.
* Engage client to gather software requirements/business rules, and ensure alignment with development teams
* Interacted with various business team members to gather the requirements and document the requirements.
* Provided detailed estimates of the level of effort associated to implement the technical portions of a project.
* Analyzed as-is process to identify the gaps in the existing flows and documented the same.
* Designed future state process flows and presented it to the business team and engaged them to review and provide feedback for changes
* Built CRM solutions as per business requirement for Sales lifecycle management.
* Leveraged Jira to enter user stories and track the progress of stories.
* Groomed user stories on a daily basis with the vendors and business identify gaps or changes required to existing requirements.
* Integrated, supported and administration of Salesforce Platform tools, including Collaborative, Mobile and Cloud options
* Configured Salesforce one app and Setup SSO for mobile sign in
* Worked on Cloud option on Sales and Service cloud.
* Worked on Collaborative - Leveraged Salesforce Chatter for the teams to communicate with each other.
* Configured library and provided access to users to share documents internally to individual or group and also share externally.
* Described the territory management in salesforce and how it would improve the efficiency of the system.

**Environment:** Saleforce.com platform, Data Loader, Workflow & Approvals, Custom Objects, Custom Tabs, Sandboxes (Developer sandbox, Configuration only, Full sandbox)

**Client: HSBC Bank- New York, NY Aug2017– Dec2018**

**Role: Sr. Salesforce Business Analyst**

**Responsibilities:**

* Gathered business requirement for developing pre-work, work breakdown schedules for digital asset management solution.
* Facilitated several JAD sessions with stakeholders to identify requirements and Cost/Schedule estimate.
* Participated in the identification, understanding, and documentation of business requirements, keeping in mind the need for the application based on the project scope and SDLC methodology.
* Customized data loader configuration to send legacy data to salesforce.com.
* Setup & configured custom fields, objects, reports, & dashboards to help companies optimize their use of time & data, with initial & reimplementation of Salesforce.
* Cleaned data with pre-implementation & within Salesforce with preventative measures to assist clients with data quality moving forward with Salesforce.
* Worked on Salesforce Service Cloud tools like Reports, Cases, Dashboards.
* Worked as Salesforce admin support governing user account creation, personal information setup, password reset, updating company profile, network access setup, company-wide defaults, and locale, roles, profile and user group creation.
* Provided support and customization to the Salesforce.com platform that involved creating Triggers and S-controls to extend the application functionality as per the business requirement.
* Customized different Salesforce.com applications to incorporate the business requirements which involved creating Web Forms using and processing the data in SFDC with the extensive usage of Web services API.
* Designed, and developed Apex Classes and Apex Triggers for various functional needs in the application.
* Performed administration, configuration and implementation of Salesforce.com Sales Cloud platform.
* Worked closely with the client base to understand and meet their needs by incorporating new functionality and features into the systems.
* Facilitated the weekly meetings with the review teams to continuously improve the QA process for the application development.
* Involved in migrating data from Oracle to Salesforce.com
* Provided production support and clarified business queries for impacts and prioritization of any issues.
* Maintained task boards and produced daily burn down charts to monitor and report the progress to senior management.
* Was Subject Matter Expert on the business processes with experience to map it functionality to the required Salesforce.com technologies.
* Performed extensive Data mapping between source files and target fields in the backend database.
* Accumulated customer requirements from various end through surveys, interviews and JAD sessions and translated them into system requirements.

**Environment:** MS Office Suite, Visio, SharePoint, Salesforce, Sales Cloud, HP ALM/ QC, Triggers and PL/SQL

**Clients: Towers Watson, Philadelphia, PA Jan 2015 - July2017**

**Role: Salesforce Business Analyst**

Applications on Sales Cloud and Service Cloud Platforms.

Implemented accounts, contacts, opportunities, products, price books and quotes for both customers. The system enables manage the opportunities effectively and provide quick quotes for the services offered.

Implemented Cases, Knowledge and communities for both customers. The solution puts all the information representatives need at their fingertips. Agents can manage cases faster, track customer history and view dashboards

**Client: Medica, Minneapolis, MN Aug2013 - Dec 2014**

**Role: Salesforce Business Analyst**

Analyzed standard industry practices of back office applications of insurance company including underwriting, billing, policy, and claims administration with the help of Subject matter expert.

**Responsibilities:**

* Identified business process requirements, refinements, gaps and bottlenecks; Generated Business Requirement Document reflecting these aspects. Maintained BRD.
* Performed detailed analysis of functional and technical requirements; designed and deployed custom objects; identified lookup and master-detail relationships; and created junction objects.
* Worked on various standard objects like Leads, Accounts, Contacts, Opportunities and Campaigns
* Created custom objects, fields, page layouts, custom tabs and components
* Implemented security and sharing rules at object, field, and record level for different users. Created various profiles and configured permissions based on organizational hierarchy.
* Implemented pick lists, validation rules and formula fields for custom objects.
* Implemented validation rules on objects and tabs, Page layouts, Custom tabs, and Components to suit business needs
* Implemented workflows and approvals for various functional requirements.
* Maintained and gave permissions for communication templates based on profiles & roles.