**Heena Mehta**

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**Summary**

Salesforce Certified Application Architect, Salesforce Certified Marketing, Service and Sales cloud Consultant with experience in Enterprise Architecture, Project Management and Delivery, Business analysis, SDLCs, ICD- 9/10, Underwriting, knowledge of HIPAA regulations and guidelines, EDI’s, SQL, meaningful use, EHR implementation, familiarity with Data Warehousing and broad set of technologies like Tableau, experience in managing and analyzing healthcare and clinical data, good understanding of research methods and terminology, advanced understanding of biostatistics and biostatistical methods.

Highly experienced in gathering and documenting project requirements, managing and reporting on project execution, developing and executing test scenarios, performing Salesforce Configuration and deployments and regularly releasing working software using Agile Scrum methodologies. Proven ability to rapidly design, estimate, prototype and implement complex systems, perform Data Migration, effectively lead cross functional teams, resolve critical path issues, manage internal client relationships, mitigate risks, and promote an unfaltering mission to drive innovation in solution delivery and support consistently on time and within budget. Experience in global delivery model and working with In-house and dispersed offshore virtual teams.

**Skills**

* Agile Scrum, Project Management, Salesforce Projects Implementation, Virtual and Offshore teams, Client relationship management, Internal Stakeholder Management.
* Salesforce Service Cloud, Einstein Wave Analytics, Sales Cloud, Marketing Cloud, Heroku, Communities, Postgres Db, Twilio, Tableau, Google dialog-flow, SOAP, REST API’s, Lightning components, CTI, Live Agent, Chat Bots, JavaScript, SQL server, Jira, Confluence, Trello, BPM, Appian RPA, PEGA, Informatica, Cast Iron, MDM, Data Migration and Synchronization, Visio, oAuth, Integration design patterns and best practices.
* Vendor\OPS (Outside Professional Services) Management, RFP, SOW, Contractor On-boarding and Invoice Tracking

**CERTIFICATIONS**

* Salesforce Application Architect (#7783)
* Salesforce Administrator (#1971534)
* Salesforce Service Cloud Consultant (#19197923)
* Salesforce Sales Cloud Consultant (#19250131)
* Salesforce Marketing Cloud Consultant (#19165101)
* Salesforce Certified Data Architecture and Management Designer (#19199259)
* Salesforce Certified Platform App Builder (#19358803)
* Salesforce Certified Platform Developer I (#19349191)
* Salesforce Marketing Cloud Email Specialist (#19106861)
* Certified ScrumMaster® (CSM®)
* ITIL V3 Foundation

**EXPERIENCE**

***Sr. Engagement Manager/Architect*** January 2015 - Present  
 TTec  
 Franklin, TN

* Develop and manage full project lifecycles, scope, objectives, work plans, budget, timeline, resource plans, deliverables, client updates and ensuring delivery success for Service cloud, Marketing Cloud and Force.com platform.
* Direct hands on experience building solutions on the Salesforce.com ecosystem – Einstein Wave Analytics (Reports and Dashboards) , Sales Cloud (Lead Optimization and prioritization, Opportunity management), Service Cloud (Live Message, Live Agent, CTI, Service Console, Omnichannel, etc.), and Marketing Cloud (Customer and recall journeys).
* Lead data migration projects and ensure a consistent information quality approach is followed across the organization. Oversee data profiling, cleansing, integration, augmentation, matching processes and use it for measuring the KPIs and process efficiencies. Generate and refine metrics and scorecard reports demonstrating effectiveness of program activities and trends
* Implemented Data Analytics project to maintain and enhance data quality and assurance using Tableau and Salesforce Einstein Wave Analytics.
* Work with diverse and strong cross functional teams as well as onshore and offshore (Philippines, Ukraine, India and Argentina) development teams, optimizing plans and resources to deliver maximum value to clients. Lead daily offshore development Scrum meetings.
* Apply the Agile Development methodologies to manage the product backlog, groom and scope enhancements, and track the efficiency of the development teams.
* Work with Business Analysts to articulate requirements specifications, create user stories and development specifications that communicate the problem being solved and the users being impacted.
* Manage multiple engagements using Salesforce platform with integration to Maritz, PEGA, Epsilon, DocuSign, ShiftDigital and other third-party vendors.
* Assisted business stakeholders for management and support of existing applications related to Lead Management, Inbound program (Call, SMS and Chat), Lease Pull Ahead, Defector Prevention, and Owner Conquests for commercial vehicles, second owner conquests for Aftersales and Nissan One to One Rewards Program as well as new Model launches.
* Work with stakeholders and end-users to understand their goals and challenges and interpret their business requirements into effective solutions within the Salesforce.com platform.
* Analyze complex ideas or proposals and build a range of meaningful recommendations for process and efficiency improvements.
* Creating, implementing and presenting training materials and tools for internal teams. Responsible for creation and execution of LMS training program for Marketing Contact center using the Salesforce platform which helped with combating 30-day attrition and increased satisfaction scores for new hires
* Manage and communicate project direction, approach, priorities, events and status to all project resources and business sponsors, develop and oversee product releases and schedules showing key milestones for each project, working with development to deliver on those plans.

***Salesforce Consultant*** July 2014 - January 2015  
 Virsys 12  
 Brentwood, TN

* Under general direction acts as a liaison between the applications development team and the business users to identify access, and document business requirements, analyze the impact of proposed solution across the organization and develop use cases that explain/demonstrate business requirements/ specifications to the development team
* Manage security, users, Roles, Profiles, groups, queues, sharing rules, and other set up options
* Build, manage and maintain custom objects, fields, formulas, validation rules, custom workflows, approval processes, page layouts, alerts, reports and complex dashboards as required.
* Proficient in Data manipulation and cleansing methods, data management, knowledge of data governance. Extensively used Apex Data Loader, Dataloader.io, Import Wizard
* Experience using Demand tools for de-duping Accounts, Contacts and Opportunities, used excel for data manipulation and cleanup prior to data loads
* Experience in Setting up of Partner and Customer Community (Sending mass invites, login access, set up of Profiles, Role Hierarchy, page layout enhancements, design of custom VF pages, custom tabs)
* Monitor and review the Pilot team test results for User Community, train the Pilot team to navigate the system by creating written documentation, training sessions and providing support
* Set up Visual Workflows/ Scripting for the Services team based on their process maps, workflows
* Experience with Campaigns (Call and Email)- Created functionality for the Org to send custom Force.com Surveys via Email Campaigns, create custom reports to capture the data, set up custom email templates
* Collaborate with the Business Development team to pull accounts, segment data and identify Campaign opportunities
* Experience for setting up and using varied App exchange products: Marketo, iContact, Map Anything, Drawloop, DocuSign
* Coordinate with resources for Custom development activities; conduct User Acceptance testing (UAT) for end to end Solution testing

***Business Analyst -*** January 15, 2014- April 16, 2014  
 Hospital Corporation of America (HCA)  
 Nashville, TN

* Assisted with the configuration and setup of Provider Community using Salesforce.
* Evaluated current state Regulatory requirements for “Secure text messaging”, “Call Bell Systems” and “Critical Lab Notifications” and identified gaps and opportunities for improvement.
* Partnered with the BA team to gather, analyze and document detailed functional and technical requirements and workflows related to current process change for the “Mobility” project
* Provided cross functional and subject matter expertise to explain intricacies and caveats, and develop business process flows and alternatives during “JAD sessions”
* Collaborated with the BA team to create business process models using best practice techniques, including current and future state solution design documents based on requirements gathered and Business scope and objectives for the “Mobile Application” project
* Was able to successfully work and complete multiple projects and tasks, concurrently
* Performed Data Validation, Analysis and Mapping of “Innovation survey data” to corporate initiatives and roadmap
* Interviewed Stakeholders to get a better understanding of the business problems and gathered requirements and needs to distill and develop Data Request forms (PEWS , EHR Access)
* Experience working with MIS dictionaries in Meditech and created query mnemonics for the Evidence Based Clinical documentation (EBCD) project
* Assisted with identification and selection of appropriate apps for the Mobility project and helped to set up the App Analysis Workbook, App request template and end to end process flow for the App Catalog
* Working knowledge of Tableau, handling BRD’s and Data Governance from the CDW team
* Used Mind Mapping software for demonstration of Innovation Roadmap
* Researched to set up a Pilot study with a vendor for “Efficacy of turning protocols and patient outcomes”

***Underwriting Consultant*** October 2010- June 2014  
 Exam Management Services, Inc. (EMSI)  
 Waco, Texas

* Working remotely on underwriting life settlement applications with expertise in heavily impaired, senior market risk.
* Evaluation of all medical records including imaging records, lab work, reviewing any correspondence, and providing comprehensive life expectancy reviews and mortality assessment % based on individual’s medical conditions and expert underwriting risk assessment methodology
* Approve substandard cases with flat extra and medical rating of up to 400 % for Age less than 85 years.

***Underwriting Consultant*** July 2008- September 2010

Advanced Underwriting Solutions (AUS)  
 Aurora, Colorado

* Evaluated all medical records including imaging records, lab work, reviewing any correspondence, and providing comprehensive life expectancy reviews and mortality assessment % based on individual’s medical conditions and expert underwriting risk assessment methodology
* Completed mortality risk assessment, underwrote cases both highly rated and preferred/ standard risks
* Used AUS LS ratings as well as Brackenridge manual to arrive at decisions. Approved substandard cases with flat extra and medical rating of up to 325% or LE > 3 yrs. Referrals to MD and / chief Underwriter had > 95% acceptance to decisions
* Self- starter with an aptitude for adapting to new software programs/ web based systems/Microsoft applications and ability to multitask and prioritize workload. Retained information with the ability to investigate topics and quickly learned the required facts to perform job well

***Associate Manager*** September 2004- April 2006Birla Sunlife Life Insurance Company  
Mumbai, India

* Reviewed applications, gathered data and assessed risk against established underwriting guidelines and Claims history. Key player in Phase 2 of AURA (Automated Underwriting and Risk Analysis) implementation.
* Analyzed, documented and managed all requirements including business rules, functional and non- functional requirements, System process flows (“as- is”/ “to-be”), report specifications and change to requirements throughout the development lifecycle.
* Advocated the need for business process definition and continuous improvement- including developing accurate data, process and behavior flows. Helped in Translation of conceptual requirements clearly and concisely into technical documents using MS Word, Visio, Excel and PowerPoint
* Methodical study and evaluation of the existing rule sets and successful modification of the rules engine and its testing enhancing the underwriting decisions.
* Addition of new questionnaires and products to the rule sets. Assisted in writing technical specifications – Use Cases
* Performed business process reengineering of some of the key processes which resulted in enhanced data accuracy. The project responsibility included requirement documentation, gap analysis, testing, training to users and UAT team/ users signoff
* Served as a Subject matter expert on medical claims with suspected frauds and Compliance committee

**DUCATION**

***Master of Science in HealthCare Informatics*** May 2014Middle Tennessee State University, Murfreesboro, Tennessee  
 *(Cumulative GPA – 3.93)*

***Bachelor of Homeopathic Medicine and Surgery*** May 2002  
 Mumbai University, Mumbai, India