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Summary

SUMMARY

•7 years of experience in the Salesforce eco system with 2 years as a Salesforce Revenue Cloud Solution Architect.

•Significant experience in Salesforce configuration, implementation and deployment of Sales, Service, Revenue Cloud and Field Service Lightning

•Extensive experience with project discovery, requirements gathering, solution definition, estimation and project planning

•Experience using Salesforce declarative features to solve functional processes by automation, configuration, data migration and deployment in Sales, Service, Communities, CPQ and FSL implementations

•Experience with Scrum/Agile, hybrid and waterfall SDLCs, project management, business analysis, change management, developing and executing user training and enhancing user adoption

•Experience with relational databases, office suite along with MS Excel including Pivot Tables, Lookups and Formulas/Functions, MS Access, MS Visio

•Experience with Salesforce release management and metadata migration using Change Sets

•Ability to work as part of a team and independently and excellent communication, interpersonal, planning, analytical and project execution skills

CERTIFICATIONS

•Salesforce CPQ Certified Specialist

•Vlocity Administrator & Developer

•Salesforce Field Service Lightning Consultant

•Salesforce Community Cloud Consultant

•Salesforce Sales Cloud Consultant

•Salesforce Service Cloud Consultant

•Salesforce Platform App Builder

•Salesforce Administrator (ADM 201)

Experience

CEO & Lead CPQ Solution Architect

Sujen Consulting

Jan 2018 - Present (4 years 10 months +)

Currently leading the digital transformation and streamlining of Opportunity to Order processes for multiple clients using Salesforce CPQ Solution

•Lead discovery sessions and design the CPQ solution to convert their Opportunity to Quote processes

•Develop and build the solution design with my team of developers

•Guide the team on designing the product catalog, pricing and quote and order creation using Salesforce CPQ features.

•Guide the team on designing the quote templates with various conditions and terms

•Demo finished build to customers before moving to UAT

•Lead UAT and deployment to production

CPQ Solution Architect - Contract
RSM US LLP
Nov 2021 - Present (1 year +)
•Currently working on multiple projects to building a CPQ Solution for the Quote to cash process.
•Lead discovery sessions and designed the CPQ solution for a gaming company to convert their Opportunity to Quote processes with DocuSign templates.
•Developed the solution design and worked with developers on configuring the product catalog, pricing, building configuration attributes and summary variables automate various types of discounts that need to be applied at the quote level based on certain criteria.
•Designed quote templates with various conditions and terms that determined their visibility on the quote template based on certain criteria/conditions.
•Lead UAT and deployed to production
•Lead discovery sessions for managed services for a cloud-based banking platform company for their Mortgage and Consumer Banking products existing CPQ processes and design changes to existing Quote templates and creating new quote templates.
•Leading the digital transformation and streamlining of all Opportunity to Order processes in Salesforce for four disparate divisions of a major healthcare provider, by designing, developing & integrating business processes, building the product catalog for assets and subscription products with product and pricing rules, guided selling, advanced approvals, process builders, flows & Conga and DocuSign templates to develop and deploy a Salesforce Configure, Price, Quote (CPQ) solution with integration to NetSuite Billing.

Salesforce Consultant - Contract
Cognizant
Sep 2020 - Oct 2021 (1 year 2 months)
•Worked on two Salesforce projects, one for Salesforce CPQ and the other for Salesforce Experience Cloud:
•Salesforce CPQ Project: Lead this project from discovery, design, build and implementing the CPQ Solution to redesign and configure the existing product catalog in Sales cloud to include bundles, pre-existing discounts, automate different pricing and build quote templates.
1. Specific features utilized in the CPQ solution included redesigning the Product catalog, build subscription products, product bundles, quote line editor, quotes, approval rules, Configuration attributes, Summary variables, Orders, Contracts and Renewals, MDQ solution for annual subscription fees
2. Design and build warranty, shipping and labor costs associated with products and show them on QLE and related quote documents.
•Salesforce Experience Cloud project: Responsible for building the hospital and accident products pages for an insurance company with my team using Salesforce Community cloud to enable plan administrators the ability to choose this product, add the schedule of benefits and add it to an existing/ new employee as a benefit. Specific responsibilities included:
1. Leading discovery and design sessions with product owner and multiple stakeholders to understand and document the as – is and to-Be Processes, developing plan, design and requirements
2. Responsible for converting these requirements to epics, technical requirement, user stories, user story maps, release and sprint planning and led backlog grooming, prioritization sessions
3. Responsible for assigning user story tasks to team
4. Work with the dev team to configure and build these requirements

5. Leading UAT and demos with product owner and stakeholders
6. Facilitating UI design sessions and worked with UX team to build wireframes

CPQ Solution Architect- Contract
The Crevalle Group
Apr 2020 - Sep 2020 (6 months)
Led the implementation for building a solution for the Quote to cash process using Salesforce CPQ.
Responsibilities included:
•Facilitating and leading discovery and design sessions with product owner, multiple stakeholders to understand and document the as–is and to-Be Processes for the different business entities.
•Identify integration requirements and systems that need to be replaced.
•Capture these requirements into Epics/user stories(grooming), sprints design and documentation
•Inform client on best practices
•Work with client to get sign off on MVP and change orders that might stem from requirements •Work with Technical architect to build solution design document, convert functional requirements to technical requirements
•Build solution based on the technical requirements from installing packages in different sandboxes and production, build and configure CPQ page layouts, configure asset, subscription and MDQ products, bundles, product and price rules, Quote and QLI and quote templates.
•Build approval rules and processes
•Schedule internal demos with product owner through each sprint for approval
•Conduct UAT Sessions with stakeholders, scripts for UAT and get sign off
•Set up Prod with profiles/permission set licenses and read/write access to CPQ objects
•Move configuration via change sets once tested from Dev to UAT and Prod
•Work on training documentation and Salesforce technical delivery with vendors, project teams and lead business requirements translation, design, implementation, testing, and complete life cycle of Lead to Cash processes

Salesforce Consultant - Contract
World Oil Corp.
Apr 2019 - Mar 2020 (1 year)
Managed the digital transformation of World Oil's sales and service/customer engagement processes called JETSON. The JETSON Program included the implementation of Salesforce Sales, Service, CPQ and Field Service Lightning to move World Oil Corporation from paper, MS Excel, and Legacy system-based processes to fully automated Salesforce processes. Responsibilities included:
•Leading the gathering of functional requirements across all World Oil Corporation business divisions.
•Facilitating and leading the discovery and design sessions to understand and document the As – is and To-Be Processes for the enterprise wide JETSON Program that includes integration of Salesforce with EMS (Environmental management systems) and NetSuite using Dell Bhoomi
•Facilitating persona-based discovery sessions, leading the review and grooming of Epics/User-stories, conversion of functional requirements to technical requirements and client presentations and demos as required
•Managed the development and delivery of hazardous and non-hazardous material processing Lead to Cash end to end process using EMS integrated with Salesforce Sales, Service, CPQ, Field Service Lightning and NetSuite to automate the creation of leads, accounts, contacts, opportunities, credit checks, quotes, service contracts, workorders, scheduling & dispatch of service appointments to fulfil of work orders and invoice creation

•Accountable for Salesforce technical delivery with vendors, project teams and lead business requirements translation, design, implementation, testing, and complete life cycle of Lead to Cash processes
•Managing the delivery of Salesforce configurations/builds, system testing handover/co-ordination, UAT, training documentation and deployment activities including hyper care

> Salesforce Consultant - Contract
Accenture Federal Services
Sep 2018 - Jan 2019 (5 months)
Worked as a team member for a multimillion USDA Accenture Federal Services project to build customized pages for account members validation and apply for grants with USDA. The solution design comprised of using Salesforce Experience cloud and Salesforce Industries Configuration to create Community pages with member log ins, account validation by uploading documents and application process to apply for federal grants. Responsibilities included:
•Participating in discovery and design sessions and workshops to create a Salesforce Experience for applicants to enable them to apply for various grants and loans
•Worked on updating the user acceptance criteria for user stories
•Created and configured Experience cloud pages to approve applicants and submit applications by using Salesforce Industries Omniscripts.
•Configured Experience cloud home page to display application details
•Configured Experience cloud access and administration for internal and external users
•Built automated processes for loan and grant application using Process Builder
•Developed guided flows using Salesforce Industries OmniScripts, Data Raptors, Cards, and Integration Procedures to enhance the applicant's user experience via the Salesforce Experience Cloud
•Developed GridBuddy reports
•Configure Service Cloud Console for lightning web components
•Set up security for the Phase 2 part of the project via Profiles and Permissions Sets both for internal and external users

V12 Salesforce Consultant - Contract
Virsys12
Jun 2018 - Oct 2018 (5 months)
• Configured Provider and Patient Console and Portals for healthcare clients using Health cloud.
• Participated in discovery, design, and planning sessions
• Set up and configured Patient and Provider Portals
• Built process builders, flows, set up profiles, permission sets, sharing rules, public groups and converted all existing workflows to process builders
• Set up Knowledge widget in the Health/Service console and worked on articles and protocol creation to provide easy access to care coordinators to send relevant content to patients that matched with their care plan
• Enabled Care Plans and Care Teams for Patients on the Health/Service Console
• Configured problems, goals, and tasks relevant to a Care Plan
• Health/Service Console configuration for quick actions, knowledge setup and upload attachments

Salesforce Administrator - Contract
Ayurmegha
Apr 2017 - Sep 2018 (1 year 6 months)

Ayurmegha is a Salesforce ISV EHR with integrated telemedicine that is customized to help Ayurveda practitioners become more productive and compliant through efficient utilization of advanced Ayurveda focused Healthcare IT solution. As a Senior Business Consultant, I managed the customer onboarding, transformation of various client's customer engagement strategies and platform by:
•Conducted discovery sessions, designing and configuration/development of Salesforce Ayurmegha managed package solutions and deployment of these solutions in releases
•Helped customers install Ayurmegha Salesforce ISV and other App Exchange managed packages
•Lead discovery, design and planning sessions for Patient and Physician Portals
•Designed the Customer facing community page using Salesforce Experience Cloud
•Setting up security model and configured Patient and Physician access on the customer facing community

Salesforce Administrator - Contract
Light up LLC
Jan 2016 - Mar 2017 (1 year 3 months)
Supported several client Salesforce implementations and releases by:
•Creating and managing User Roles, Profiles, Security Controls, Sharing Rules, and Role Hierarchy
•Created and updated Page Layouts, Lookup Fields & Formula Fields, Standard Related Lists, Tabs, Custom fields, and dependent picklists using Field-Level Security requirements.
•Built automated processes using the process builder to effectively utilize the Salesforce.com platform capabilities.
•Migrating salesforce code from sandbox to production environment efficiently through change sets
•Imported Excel/CSV based customer information records into Accounts, Contacts and Cases using Data Loader
•Worked closely with the Business users to keep database clean ensuring accurate customer data
•Worked with the product owners to develop change management strategies, rollout plans, communications plans, user training plans and schedules
•Developed and implementing test plans, and various test cases for UAT to ensure solutions meet all end user requirements.

Sales Operations Analyst
Move, Inc
Jun 2005 - Apr 2007 (1 year 11 months)
•Built reports for Sales Reps monthly commissions, analyzed, and forecasted next month's commissions to set target quotas based on current metrics and future market potential for the Sales Team
•Built Sales Commissions for the company's flagship website realtor.com and homebuilder.com
•Analyzed and built quarterly bonuses and other incentives reports for sales the Sales team
•Conducted Compensation research and analysis, designed alternatives and determined and reported cost implications for compensation related programs
•Responsible for Sales data management & quality, cleansing and keeping the information up to date, verifying the quality of the data
•Supported Email Marketing campaign coordination and execution

Compensation Consultant
Hewitt Associates LLC
Nov 1999 - Mar 2002 (2 years 5 months)

•Built Compensation & Benefits Reports for various multinational clients using the Hewitt Compensation System, SQL, MS Excel, MS Word, industry benchmarks etc. These reports were generated based on client needs including compensation benchmarking criteria (levels/grades/position) and comparator basket.
•Clients included IBM, Dell, HP, Cisco, Oracle, Lucent Technologies, Digital, 3M, Pfizer, Wipro, TCS, I2 Technologies, Infosys, etc.

Education

Mangalore University

Bachelor of Business Management, Business Administration, Accounting