Certified Salesforce Business Analyst with 7+ years of proven experience and expertise in implementing and administering CRM and business intelligence tools. Organized problem solver with strong technical aptitude and ability to partner with leadership, sales, marketing, support, and other important teams to maximize operations and interactions.

**CERTIFICATIONS**

Salesforce Certified Administrator (ADM201)

Salesforce Certified Platform App Builder (CRT403)

Salesforce Certified Sales Cloud Consultant (CRT251)

**SKILLS SUMMARY**

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| Salesforce.com | Sales Cloud, Service Cloud, Lead and Case Management, Lead-to-Order, Opportunity and Sales Pipeline Management, Email-to-Case, Custom/Standard Objects, Validation Rules, Relationships, Workflows & Approvals, Reports, Dashboards. |
| SFDC Tools | Force.com Eclipse IDE Plug-in, Force.com Explorer, Force.com Data Loader, Force.com Platform, Force.com Migration Tool. |
| Management Tools | Atlassian JIRA, MS Visio, MS Project, MS Word, and Excel |
| SDLC Methodologies | Agile (Scrum & Kanban), Waterfall |
| Databases | Oracle, MySQL, SQL Server, MS Access |
| Operating Systems | Windows – XP, 7, 8,10, Windows Server 2000, 2003, Mac |

**PROJECTS**

**Salesforce Business Analyst & Admin El Monte, California March 2018 - Present**

**East West Bank**

**Project Description:** To streamline the process of loan request processing and approval, East West Bank wanted to create Commercial Credit Reporting application for its business users. The application is based on the Sales Cloud, creating a 360-degree view of bank’s customer who is requesting the loan. Some of the major implementations include integration of the application with core banking data warehouse through the web API, document management for the loan application, and creation of Salesforce Partner Community Portal for appraisal reviews of the assets. Also, East West Bank decided to upgrade their existing Sales Cloud from Classic into the Lightning Experience. This project included performing complete business and technical analysis of the requirements, solving current user pain points, and providing effective business needs to drive higher adoption and business value.

**Key project highlights include:**

* Creation of Custom Objects, page layouts, and search layouts to organize fields, custom links, related lists, and other components on a record detail and edit pages.
* Implementation of pick lists, dependent pick lists, lookups, master detail relationships, validation rules and formula fields to the custom objects.
* Creation and configuration of profiles, permissions sets, sharing rules and OWD settings to ensure appropriate data access for various groups of users in the organization.
* Creation of reports & dashboards, workflow rules & defined related tasks, time triggered tasks, approval process, email alerts, field updates.
* Implementation of Web Services and related languages (XML, JSON).
* Implementation of tools like Dataloader and Jitterbit to Extract, Transform, Load (ETL) bulk data.
* Implementation of Apex classes and Apex triggers to extend on the existing Salesforce functionalities.
* Creation of SOQL and SOSL queries to search and perform searches as per requirements.
* Implementation of Salesforce automation (SFA) to leverage the force.com platform.

**Job duties performed:**

* Collaborate with stakeholders and the team of developers to create and upgrade Commercial Credit Reporting application.
* Lead the team of business analysts and developers in performing gap analysis between Classic and Lightning versions of the Sales Cloud, to compare both standard and custom functionality of key business processes built in Salesforce and to document the functionality differences.
* Worked with developers and the customer to understand functional and technical requirements.
* Analyze and Design matrix information sharing structure for Sales organization using Salesforce.com.
* Organized Scrum ceremonies and responsible for writing user stories in JIRA, testing them, creating, and maintaining backlogs and sprint reports.
* Coordinate and support Agile Scrum activities as needed to address backlog items including new user stories as well as defects within application product backlogs.
* Create and groom backlog of user stories in an agile development environment.
* Determined potential enhancements to the system and documented cost, level of effort and business value for solutions to develop a project plan and determine priority items.
* Worked with Product Owners and Business Stakeholders to discuss gaps, identified solutions and to discuss the level of effort, complexity, business risks and priority of building solutions to meet with the gaps.
* Researched about the new Lightning Experience features that increase business value by solving for the end-user’s pain points with Classic version of the Sales Cloud.
* Conducted and facilitated brainstorming sessions and joint application design sessions with Business Owners and Stakeholders to gather and fine tune requirements, to develop and customize solutions based on business and user need and created BRD & FRS documents to receive signoff.
* Perform business process modelling, User experience modelling and basic technical architecture diagramming.
* Created Project backlog, Sprint backlog and user stories with acceptance criteria in JIRA based on the BRD and FRS documentation.
* Involved in production deployment using Force.com IDE and change set.
* Perform business process modelling, User experience modelling and basic technical architecture diagramming.
* Created and implemented dry run strategy to perform high level validation for changes in the application prior to Production deploy to help determine estimated timeframe for business and production validation.
* Wrote test cases for performance testing, coordinated with performance test engineers to create, and execute test scripts.
* Reviewed performance test results with Product Owner and IT Engineers to discuss potential enhancements to the Salesforce application that drive faster performance and improve efficiency.
* Advising on Salesforce.com best practices.
* Develop training documentation, provide training to customers, demo solutions to customers.
* Conducted UAT sessions at appropriate stages of deployment to ensure product accuracy as per the requirements.
* Created interactive documents with training material to educate users with new features in Salesforce and functionality differences and limitations and assisted Training team with creating knowledge articles.
* Drive platform roadmap and adoption of product releases by engaging with business and IT leaders within the organization and with Salesforce and vendor product teams.

**Salesforce Business Analyst Rosemont, Illinois January 2016 to August 2017**

**US Foods**

**Project Description:** With Sales Cloud implementation already up and working, US Foods wanted to implement Service Cloud to keep up with the customer support. Queries about the delivery issues would take up a great amount of support agents’ daily time. Additionally, there was the requirement to bring cases submitted on the support email directly to the Service Cloud. The complete business and technical analysis were performed while mitigating the challenges such as data integrity and Salesforce adoption. By effectively conducting end user training sessions, the primary objective of the productivity of support agents was met.

**Key project highlights include:**

* Creation of Custom Objects, page layouts, and search layouts to organize fields, custom links, related lists, and other components on a record detail and edit pages.
* Implementation of picklists, dependent pick lists, lookups, master detail relationships, validation rules and formula fields to the custom objects.
* Creation of workflow rules & define related tasks, time triggered tasks, approval process, email alerts, field updates to implement the business logic.
* Creation of process builder, design custom tabs, approval processes and auto-response rules.
* Creation of page layouts, search layouts to organize fields, related lists, and other components on record pages.
* Development of Email-to-Case functionality, which directly converted support emails to Cases in Service Cloud.
* CTI Integration with Cisco Unified Communications Platform.
* Live Agent Chat and Messaging Integration with Twilio.
* Sales and Service Cloud integration.
* Development of case management structure for effective customer and user issue support.
* Contracts & Entitlement management.

**Job duties performed:**

* Served as liaison between SME's, Project Manager, IT, QA leads & stakeholders to ensure accuracy in the business implementation.
* Participated in requirements gathering sessions, proactively drawing out requirements from stakeholders.
* Participated in weekly meetings with key stakeholders in preparing Gap analysis, Risk analysis, prioritizing pain points, project planning and identifying project scope.
* Assisted project manager in the day-to-day aspects of managing projects, such as managing project plans, communicating to team members, managing the project schedule, developing and posting status reports, and checking on quality and timeliness of work.
* Analysis of requirements and issues requires a solid understanding of contract management, contact management and integrations.
* Documented use case scenarios using UML diagrams including activity and sequence diagrams.
* Authorized Business Requirements Documents and Functional Requirement Documents for the Service cloud implementation modules.
* Documented business requirements including epics, user stories, process flows, test plans, training, implementation plans and support procedures.
* Created requirements definition documentation, including use cases and acceptance criteria, and worked with the development leads on their functional designs and specifications ensuring stakeholders approve documentation.
* Followed Agile Scrum methodology for project development.
* Conducted UAT sessions with key stakeholders.
* Maintained and improved existing Salesforce implementation.

**Salesforce Business Analyst**

**Year Up Boston, Massachusetts April 2014 to April 2015**

**Project Description:** Year Up provides young adults from urban communities in the US with skills, experience, and support that will empower their professional career and higher education. The client works with a growing network of staff, students, donors, volunteers, and alumni. They wanted to enhance the existing Sales Cloud functionality and features to be more data driven. To capture each student’s information in Sales Cloud, starting with initial interest forms and online applications, and continuing with training details and post-graduate employment information, along with the use of Chatter as a channel to connect students, staff, and internship partners. The Sales Cloud implementations required identifying various data requirements as per the data model, conducting testing, organizing the workflow, and meeting project delivery timelines.

**Key project highlights include:**

* Implementation of Accounts, Contacts, Leads, Opportunities and other standard objects, their fields, and layouts.
* Creation of new custom objects and custom fields to accommodate proposed business changes.
* Implementation of the Organization Wide Default settings for the Standard and Custom objects to give various levels of access to various users.
* Creation of formulas, relationships, page layouts and workflow rules across various objects and fields.
* Creation of validation rules to check the accuracy of data entered by the user and display appropriate message dialogue based on the validation criteria.
* Implementation of Salesforce Territory Models and related processes & objects (Account Teams, Opportunity Splits, etc.)
* Extending the native SFDC reports to leverage custom fields in creating more efficient reports and dashboards.
* Performing deployment activities using change sets and Eclipse IDE.

**Job duties performed:**

* Assisted managers and the business in defining scope and priorities for the project.
* Worked closely with business users to ensure implementation activities are in alignment with business strategy and objectives.
* Responsible for writing user stories in JIRA, testing them, creating, and maintaining backlogs and sprint reports.
* Identify, analyze, and document the business and functional requirements, communicate with product owner and business team about project status, problem solving and design solutions.
* Report about issues in development and affected timelines to the management much in advance to mitigate risks.
* Assist QA team with performing acceptance tests based on acceptance criteria & conducting testing as needed.
* Involved in UAT and provided support during the UAT.
* Followed Agile Scrum methodology for project development.
* Maintain troubleshooting guide for Salesforce issues to have immediate solutions.

**Jr Salesforce Business Analyst**

**Rate Gain Noida, India January 2012 to March 2014**

**Project Description:** Rate Gain has built its business helping hospitality and travel companies generate more revenue through information such as competitive rates and occupancy. Companies can access this data in real-time to optimize their own pricing and then use RateGain’s distribution services to maximize bookings. RateGain wanted fresh implementation of Sales Cloud to move away from its existing CRM, ACT, which had fewer capabilities. It also wanted to eliminate the use of spreadsheets to manage opportunities in a scalable way. It has sales reps in 12 cities globally and wanted to provide them with consistent and effective processes to close deals faster. It wanted to consolidate reporting and give management more data to forecast performance along with the capabilities of Chatter and App Exchange.

**Key project highlights include:**

* Implementation of standard and custom salesforce objects.
* Gathering data from the legacy systems.
* Deployment of custom tabs, validation rules, approval processes and auto response rules for automating business logic.
* Implementation of security framework within SFDC leveraging user roles, Profiles, Sharing rules and permission sets.
* Creation of various reports (summary reports, matrix reports, pie charts, dashboards) and report folders to assist managers to better utilize salesforce as a sales tool and configured various reports for different user profiles based on the need in the organization.

**Job duties performed:**

* Gathered, analyzed, and documented business and functional requirements from clients and business users.
* Worked closely with Business units to develop business scenarios.
* Elicited requirements by conducting interviews, surveys, and through business process descriptions, use cases, and tasks.
* Effectively communicated with internal teams and external clients to deliver functional requirements.
* Assisted in the development of data models and interface design specifications.
* Provide support during UAT.

**EDUCATION**

Bachelor of Technology in Computer Science and Engineering – 2008 to 2012 (Maharshi Dayanand University - Haryana, India).