**Bhavesh Shah**
+91-9979489688
bhavesh_sh@yahoo.com

**OVERVIEW:**

- With 24 years of comprehensive experience, including 20 years of expertise in sales process optimization, transformation, and automation.
- Proficient in implementing Agreement to Cash, Lead to Cash and Order to Cash processes utilizing CPQ, CLM, and Revenue tools.
- Specializes in Salesforce CPQ, Salesforce CLM, Conga CLM and Apttus CPQ / CLM with a solid track record spanning two decades.
- Skilled in driving business success through innovative technology implementations. Demonstrated ability to deliver high-quality solutions and enhance operational efficiency.
- Have a valid B1 till 2024.

**SKILL SET :**

**OPERATING SYSTEMS:** Windows XP, Windows 7, Windows 10

**CRM**: Salesforce.com

**CPQ/CLM:** Salesforce CPQ & Billing, Apttus CPQ/CLM, Conga CLM Product Suite, Selectica CPQ

**LANG/TECH:** Apex, Visualforce, Force.com, OOPS, XML, Java

**DATABASES:** Oracle 10g, MS-Access 2003

**TOOLS:** Eclipse IDE.

**EXPERIENCE**

**Eternus Solutions Pvt. Ltd. Now InfoBeans CloudTech Ltd. (Dec 2019 - Present)**

**SaaS Company – CPQ/Billing Implementation**

Role: Enterprise Solution Architect

Environment: Salesforce CPQ, Salesforce Adv. Approval Salesforce Billing

Description: Implemented Salesforce CPQ to integrate the client's SaaS product offerings into Salesforce CRM, enabling seamless quoting and ordering processes for customers. The catalog encompassed solution bundles, while advanced approval workflows for discounts and billing setups for invoice generation were also established.

Responsibilities**:**
- Collaborated with the client's architect to design solutions aligned with business requirements.
- Provided guidance and mentorship to the offshore client team throughout the project duration.

**Internal Company – Presales for India Customers**

Role: Presales Consultant

Description: Provided technical and functional support to the sales team during discovery and engagement discussions, ensuring alignment between customer requirements and proposed solutions.

Responsibilities**:**
- Collaborated with the sales team to support discovery processes for functional requirements with prospective customers.
- Assisted in driving demo preparations and presentations to customers, ensuring that solutions effectively addressed customer needs and pain points.

**Telecom Company – CPQ Implementation**

Role: Enterprise Solution Architect

Environment: Salesforce, Conga CPQ

Description: Led the implementation of Conga CPQ to integrate the client's telecom product offerings into Salesforce CRM, enabling seamless quoting and ordering processes for customers. The catalog encompassed solution bundles tailored to meet diverse customer needs.

Responsibilities**:**
- Collaborated closely with the onsite business architect to design solutions aligned with business requirements and objectives.

- Provided guidance and mentorship to the offshore client team throughout the project lifecycle, ensuring successful execution and knowledge transfer.

## FinTech Company – CPQ / CLM Implementation
Role: Enterprise Solution Architect
Environment: Salesforce, Salesforce CPQ
Description: Led a comprehensive CPQ/CLM implementation project aimed at integrating the client's payment products into Salesforce CRM using Salesforce CPQ. The project involved configuring the catalog to include legacy products, current payment solution bundles, and associated services. Contract management with customers was facilitated through Conga Contracts.

Responsibilities**:**
- Collaborated with the onsite solution architect to design solutions aligned with business requirements and objectives, ensuring seamless integration of payment products into Salesforce CRM.
- Defined CLM requirements for the project using the Conga product suite, including Conga CLM, Conga Composer, Conga Orchestrate, Conga Templates, and Conga Queries, to streamline contract management processes.
- Led and managed the offshore team, providing guidance and mentorship throughout the project lifecycle to ensure successful execution and knowledge transfer.

## Transport / Logistics Company – CPQ / CLM Implementation
Role: Solution Architect
Environment: Salesforce, Salesforce CPQ
Description: Oversaw a comprehensive CPQ/CLM implementation initiative aimed at integrating the client's logistics products into Salesforce CRM using Salesforce CPQ. The project encompassed configuring the catalog to include both legacy products and current logistics bundles, as well as associated services. Contract management with customers was facilitated through Conga Contracts.

Responsibilities**:**
- Collaborated closely with the onsite solution architect to design solutions aligned with business requirements and objectives, ensuring seamless integration of logistics products into Salesforce CRM.
- Defined CLM requirements for the project using the Conga product suite, including Conga CLM, Conga Composer, Conga Orchestrate, Conga Templates, and Conga Queries, to optimize contract management processes.
- Provided leadership to the offshore team, offering guidance and mentorship throughout the project lifecycle to drive successful execution and foster knowledge transfer.

## Real Estate Company – CPQ Implementation
Role: Solution Architect
Environment: Salesforce, Salesforce CPQ
Description: Led a strategic CPQ implementation project to integrate newly acquired business products into Salesforce CRM using Salesforce CPQ, enabling seamless access for agents and non-agent brokers. The project involved configuring the catalog to include both legacy products and newly acquired bundle products, facilitating efficient quoting processes for customer transactions.

Responsibilities**:**
- Collaborated closely with stakeholders to design solutions aligned with business requirements, focusing on modeling newly acquired products within the CPQ framework.
- Designed and built quote document requirements to ensure accurate representation of product offerings and pricing structures for agents and brokers.
- Provided leadership to the offshore team, offering guidance and mentorship throughout the project lifecycle to drive successful execution and foster knowledge transfer.

## Mind Merchants Global Pvt. Ltd., Pune (Jun 2017 – Jun 2019) *Jan18 to Apr19 on payroll rest freelancer.
## Media Company – CLM Implementation
Role: Solution Architect / Consultant
Environment: Salesforce, Apttus CLM
Description: Led a transformation project for a media company in the TV channels and telecast business to streamline their contract lifecycle management process. The project involved transitioning from manual. contracting to Apttus CLM on the Salesforce platform. Split into two phases, the first phase focused on implementing Apttus CLM for 35 contract types, while the second phase expanded to cover the

remaining. 65 contract types and integrations with legacy systems.

**Responsibilities:**

- Facilitated requirement workshops and collaborated with stakeholders to gather comprehensive requirements for the CLM implementation, specifically focusing on phase 1. Guided Business Analysts in documenting requirements in functional specifications.
- Developed out-of-the-box (OOTB) CLM solutions and custom UI pages for agreement creation for each contract type based on the scoped requirements for phase 1. Documented solution design documents for all phase 1 requirements.
- Provided guidance and mentorship to the project team throughout the development and testing phases, ensuring alignment with project objectives and successful delivery.

## Ecommerce Company – CLM Implementation

Role: Solution Architect / Consultant

Environment: Salesforce, Apttus CLM

Description: Led a transformation project for an ecommerce company specializing in clothing and designer wear to modernize their contract lifecycle management process. The project aimed to transition from manual contracting to Apttus CLM on the Salesforce platform.

**Responsibilities:**

- Conducted requirement workshops and collaborated with stakeholders to gather and document requirements for the CLM implementation, focusing on phase 1. Provided guidance to Business Analysts in documenting requirements in functional specifications.
- Developed out-of-the-box (OOTB) CLM solutions and integrated them with internal legacy systems using web services, in accordance with scoped requirements. Documented solution design documents for all project requirements.
- Offered guidance and mentorship to the project team throughout the development and testing phases, ensuring adherence to project objectives and successful delivery.

## IT Service Provider Company – CLM Implementation

Role: Solution Architect / Consultant

Environment: Salesforce, Apttus CLM

Description: Led a transformation project for a service provider company specializing in mobile application development to modernize their contract lifecycle management process. The project aimed to transition from manual contracting to Apttus CLM on the Salesforce platform.

**Responsibilities:**

- Facilitated requirement workshops to gather and document requirements for the CLM implementation. Provided mentorship and guidance to new Business Analysts in documenting requirements in functional specifications.
- Developed out-of-the-box (OOTB) CLM solutions tailored to scoped requirements. Documented solution design documents for all project requirements.
- Provided guidance and mentorship to the project team throughout the development and testing phases, ensuring alignment with project objectives and successful delivery.

## Tech Mahindra Ltd., Pune (Oct 2015 - Feb 2017)

### Telecom Company – CPQ Implementation

Role: Solution Architect

Environment: Salesforce, Apttus CPQ

Description: Directed a strategic CPQ implementation project to enable the provisioning of network products for Government customers via Salesforce CRM using Apttus CPQ. This initiative established a Telecom as a Service (TaaS) catalog, initially comprising two towers: Connectivity, featuring network products, and Security, encompassing secure connectivity and additional security features.

**Responsibilities:**

- Spearheaded the project to develop a tailored CPQ solution aligned with business requirements, with a specific focus on modeling network and security tower products to meet Government customer needs.
- Produced comprehensive solution design documentation for all project components, ensuring clarity and alignment with business objectives.
- Provided leadership to the offshore team, offering guidance and mentorship throughout the project lifecycle to ensure successful execution and knowledge transfer.

**Apttus Software India, Ahmedabad (Aug 2014 - Sept 2015)**

**Postal Service Company – CPQ Implementation**

Role: Solution Architect

Environment: Salesforce, Apttus CPQ

Description: Led a strategic CPQ implementation project aimed at integrating Post Parcel and Letter products into Salesforce CRM using Apttus CPQ, replacing the existing price and yield tool. This initiative focused on providing contract-specific rate cards for Post products, tailored to meet the needs of their customers.

Responsibilities**:**

- Facilitated requirement workshops and collaborated with stakeholders to gather detailed requirements for the CPQ implementation, documenting them in collaboration with Business Analysts in functional specifications.
- Developed the CPQ solution to model products and configure customer-specific rate card pricing, incorporating business rules and defining output document requirements to ensure accurate and efficient quoting processes.

**Manufacturing Company – CPQ Implementation**

Role: Solution Architect

Environment: Salesforce, Apttus CPQ

Description: Led a strategic CPQ implementation project to integrate CNC Machines products into Salesforce CRM using Apttus CPQ, replacing an existing Salesforce-based custom configurator. This initiative aimed to streamline the configuration and quoting process for CNC Machines, enhancing efficiency and accuracy.

Responsibilities**:**

- Conducted requirement workshops, collaborating with stakeholders to gather and document detailed requirements for the CPQ implementation, ensuring alignment with business objectives.
- Developed the CPQ solution based on the gathered requirements, with a focus on modeling products and pricing structures. This included defining business rules and specifying output document requirements to facilitate accurate quoting processes.

**Telecom Company – CPQ Implementation**

Role: Solution Architect

Environment: Salesforce, Apttus CPQ

Description: Managed a CPQ implementation project aimed at integrating mobile, internet, WAN, and other network products into Salesforce CRM using Apttus CPQ. This initiative enhanced the accessibility and efficiency of quoting processes for the organization's diverse network offerings.

Responsibilities**:**

- Collaborated with Solution Architects and other team members to develop a CPQ solution aligned with business requirements, with a focus on modeling network products such as internet services and WAN, as well as defaulting network access design.
- Produced comprehensive solution design documentation for all project components, ensuring clarity and alignment with business objectives.
- Configured internet services products, defined business rules, and established pricing structures with pricing rules in Apttus CPQ to streamline quoting processes and ensure accurate pricing.

**Product Company – CPQ Implementation**

Role: Solution Architect / BA / Config Engr.

Environment: Salesforce, Apttus CPQ

Description: Led a CPQ implementation project to integrate subscription-based payroll and financial products into Salesforce CRM using Apttus CPQ. This initiative aimed to enhance the organization's ability to offer and manage subscription services efficiently within the CRM platform.

Responsibilities**:**

- Collaborated with the Senior Solution Architect to gather requirements and document functional specifications, ensuring clear alignment with business needs and objectives.
- Worked alongside other Solution Architects in the project to develop a CPQ solution based on the documented functional specifications, focusing on modeling products, defining pricing structures, and establishing business rules.
- Produced detailed solution design documentation for all design components, providing clarity and guidance for the implementation process.

- Configured products, defined business rules, and established pricing structures with pricing rules in Apttus CPQ, ensuring accurate representation and efficient quoting processes.

## Wipro GE Healthcare Private Limited, Bangalore (Aug 2013 - Aug 2014)

Healthcare Company – CPQ Implementation

Role: Application Architect

Environment: Selectica Product Suite, Java, J2EE, Oracle 11g, Web Services, HTML5

Description: Managed the CPQ Phase II regulatory release for the Healthcare business, ensuring compliance with global regulatory standards by supporting Global Trade Item Number (GTIN) and Global Location Number (GLN) based on customer requirements. This release necessitated changes to the product modeling structure and updates to all associated rules, as well as modifications to the user interface behavior to accommodate regulatory requirements.

Responsibilities**:**

- Led the architecture and design of the solution, ensuring alignment with regulatory compliance requirements and customer needs.
- Provided guidance and mentorship to the development team, particularly on Selectica CPQ specific modules, to ensure the successful implementation of regulatory changes.
- Supported defect resolution during the testing cycle, collaborating with the team to address any issues and ensure the quality and reliability of the CPQ solution.

## IBM Global Services India Pvt. Ltd. , Pune (June 2004 - July 2013)

Healthcare Industry

Role:  Business Development Executive / Go to Market Leader

Description: As a Business Development Executive (BDE), the role entails securing business within the industry by collaborating closely with Geo counterparts. This position also involves working alongside the Global Solution Team to handle Requests for Proposals (RFPs), Requests for Information (RFIs), Requests for Quotes (RFQs), and other bid opportunities. Responsibilities include preparing responses, showcasing capabilities, understanding client requirements, and collaborating with the team to devise solution approaches. Additionally, the BDE facilitates and supports industry client visits to Global Delivery (GD) centers.

Responsibilities**:**

- Drive penetration of the existing pipeline within the healthcare industry, identifying and capitalizing on business opportunities.
- Provide regular updates on industry status to the sector leadership team, offering insights and recommendations for strategic decision-making.
- Manage and coordinate client visits within the healthcare industry, ensuring a seamless and impactful experience for clients.
- Collaborate with the Global Solution Team to prepare and respond to RFIs/RFPs for both existing and prospective customers, demonstrating expertise and understanding of client needs.

## Customer onboarding Project

Role:  ILOG Subject Matter Expert

Environment: Windows, ILOG JRules

Description: The project involves migrating business rules and data validation rules from the existing application code of the Customer Enrollment Admin Console (CEAC) to the ILOG JRules rule engine.

Responsibilities**:**

- Design and define the II-PCM (Integrated Information Process Model) in the Execution Object Model (XOM) within JRules, ensuring alignment with business requirements.
- Create the Business Object Model (BOM) in JRules, establishing the foundation for rule development and execution.
- Develop the Forward and Backward rules package and define the rules flow to facilitate seamless rule execution.
- Add the II-PCM business rules for forward and backward mapping in the Rules project, ensuring accuracy and efficiency in rule application.
- Develop a client application to facilitate the passing of GEM 2012 ICD (International Classification of Diseases) map data to the ILOG Rules Engine, enabling conversion and retrieval of 1:1 mapping result.
- Deploy and explore the II-PCM in the Rule Execution Server, ensuring proper functioning and adherence to project requirements.

- Connect to the Rule Team Server and manage II-PCM rules, including adding, editing, and deleting changes as needed to maintain rule integrity and effectiveness.

**Code Mapping Project**

Role:  ILOG Subject Matter Expert

Environment: Windows, ILOG JRules

Description: The Intelligent Precision Code Mapper (I-PCM) has been developed by the client to streamline the development of custom 1:1 maps for crosswalk purposes. These maps encompass 100% of the source ICD-9 or ICD-10 codes, including orphan codes. The manual process previously utilized by client code mapping teams was time-consuming, often resulting in similar conclusions. The client has encoded these mapping rules into algorithms to generate suggested mappings, reducing the effort required for review and finalization by mapping teams. This enables teams to allocate more time to 1: many and other mappings necessary for medical policy, benefits, and pricing remediation.

Responsibilities**:**

- Design and define the Intelligent Precision Code Mapper (I-PCM) in the Execution Object Model (XOM) within JRules, ensuring alignment with client requirements and objectives.
- Create the Business Object Model (BOM) in JRules, establishing the framework for rule development and execution.
- Develop business rules and decision rules, along with rules packages, and define the rules flow to streamline the mapping process.
- Deploy and explore the CEAC (Customer Enrollment Admin Console) Rules in the Rule Execution Server, ensuring proper functionality and adherence to project specifications.
- Connect to the Rule Team Server and manage CEAC rules, including adding, editing, and deleting changes as needed to maintain rule integrity and effectiveness.

**Product Company – CPQ Implementation**

Role: Subject Matter Expert / Consultant

Environment: Selectica product suit, Java, J2EE, Web Services, Axis API, MSAccess, Oracle, Tomcat

Description: The current AMS project involves several significant enhancements, with the primary focus on integrating different portals with Selectica Configurators. This integration effort encompasses 45 Selectica Configurators, initially integrating them with 2 portals. The integration is facilitated through the Common Configurator Interface (CCI) framework, developed using Dot Net Web Services and deployed on the BizTalk server.

Responsibilities**:**

- Conduct a Proof of Concept (POC) to validate the identified solution for integrating Selectica Configurators with Portals, ensuring feasibility and effectiveness.
- Design and develop the solution for integrating Selectica Configurators with various portals, adhering to project requirements and best practices.
- Lead deployment activities and provide ongoing support for the current enhancement work, ensuring seamless integration and optimal performance.
- Offer technical assistance to team members, providing guidance and expertise to facilitate successful project execution.
- Conduct knowledge sharing sessions among team members, fostering collaboration, and sharing best practices. Additionally, provide training to new team members to onboard them effectively.
- Regularly report project status to the client, ensuring transparency and alignment with project goals and timelines.

**Telecom Company – CPQ Implementation**

Role: Subject Matter Expert / Consultant

Environment: Selectica product suit, RSA, Clear case, RPM, Requisite Pro, Web logic 8, J2EE, SOA, Java, PERL, CVS, Windows XP, Linux

Description: The Simple Order Asset is a comprehensive solution designed to enable telecom service providers to efficiently capture and process customer orders. It offers a unified, customer-centric order entry solution across multiple channels and product lines, with real-time order negotiation and validation capabilities. This solution integrates best-in-class product information management and customer data integration applications, allowing service providers to deploy a single order entry solution for accurate, consistent, and seamless processing, leading to significant savings in the Order to Cash process.

Responsibilities**:**

- Conducted requirement analysis, particularly focusing on non-functional requirements to identify new rule patterns. Prepared requirement mapping stacks to demonstrate the fulfillment of

requirements by the solution.

- Architected and designed the order management solution for the telecommunications industry using Java and the Selectica product suite.
- Led the Proof-of-Concept (POC) effort, resulting in major enhancements to the asset and validating its feasibility and effectiveness.
- Established and managed a team of 40 resources, including interviewing candidates and providing training, both technical and functional, across various locations including the US and Bangalore, for multiple teams.
- Acted as the Technical Consultant (Selectica Architect), serving as the single point of contact from offshore for the client and US team.
- Identified and recommended additional functionalities to the client based on their business needs, resulting in additional work from the client's side.
- Provided training and technical assistance to product modelers, ensuring their proficiency in utilizing the solution.
- Monitored, controlled, and reported project activities, including quality metrics reporting, to ensure project success and adherence to standards.

## Telecom Company – CPQ Pricing Engine (part-time)

Role: Subject Matter Expert / Consultant
Environment: Selectica product suit, RSA
Description: The CR31 pricing engine serves as a crucial component for deriving pricing and discounts based on given configurations. This engine utilizes rules to qualify for valid discounts according to the current configuration and applies the best available discount. Additionally, it calculates the price for products and attributes, ensuring accuracy and consistency in pricing decisions.

Responsibilities:

- Conducted requirement analysis, particularly focusing on non-functional requirements, to identify new rule patterns. Prepared requirement mapping stacks to demonstrate the fulfillment of requirements by the solution.
- Architected and designed the order management solution for the pricing and discounting component using the Selectica product suite, with a primary focus on the knowledge-based system (KBS) and its automated generation process. Integrated the solution with the WebSphere Product Center to streamline pricing processes.
- Played a key role in providing the Proof-of-Concept (POC) for the identified solution, demonstrating its feasibility and effectiveness in meeting project objectives.

## Hardware Company – CPQ Project

Role: Project Lead/Product Modeler
Environment: Selectica product suit, Java, CMVC
Description: The Blue Horizon configurator is a robust application designed to facilitate product configuration for end-users, allowing them to configure various configurable items within selected products. Developed in collaboration with Selectica, the configurator application is tailored to support different product families. Leveraging Java and J2EE technologies such as Servlets, Swing, and JDBC, Selectica provides a comprehensive toolset for developing configurator applications. Additionally, Selectica offers a rich set of tag libraries for UI development using JSP technology, along with Application Development Kit (ADK) APIs usable in C++ and Java environments.

Responsibilities:

- Served as the interface between the client and the offshore team during a 13-month stay onsite in the USA, ensuring effective communication and collaboration.
- Led a team of 12-20 members, providing direction and guidance to achieve project objectives.
- Acted as the single point of contact for the client, overseeing work allocation to the modeling team and ensuring alignment with client requirements.
- Led the modeling of products utilized by the configurator, involving analysis of change requests and development of product models and associated business rules.
- Provided mentorship, training, and technical assistance to team members, fostering skill development and knowledge transfer.
- Took charge of reporting and monitoring project activities from a management perspective, ensuring adherence to timelines and quality standards.

**Nexgenix India Pvt. Ltd. , Mumbai (Aug 2003 - May 04)**

Role: Tech Lead

IXPlatform

- My responsibilities involved analysis of the existing DotNet system and porting the same in Java, database porting from SQL server to Oracle, creating the product package using InstallSheild and developing and providing demo to the prospective clients.

**HSBC software development India Pvt. Ltd. , Pune (December 2002 - Aug 2003)**

Role: Tech Lead

- Ease of purchase system(CRM Phase 10) - My responsibilities involved analysis of the existing AS400 based thick client system and writing specifications for the browser based application at onshore and coordinating with the offshore. It also involved in the project management activities i.e. monitoring and controlling activities for the project, project status report etc.
- Customer Relation Management(CRM) - My responsibilities involved co-ordination of the project within the offshore team and interacting with the onsite team. It also involved project management activities i.e. monitoring and controlling activities for the project, project status report etc.
- Securities ( Lender to be repaid module) - My responsibilities involved design and development of JSPs using WSBCC Extension.

**Mphasis India, Mumbai (March 2002 to Nov 2002)**

Role: Senior Software Engineer

- RSA-ASTRA ( User Maintenance) - My responsibilities involved design and development of EJB's and administrations of application sever which included deployment of the application on Oracle 9iAS.

**Silverline Technologies Ltd., Mumbai (January 2001 - March 2002)**

Role: Software Engineer

- Coreport (Staging Tool) - My responsibilities involved design and developing the interfaces which talks to Active Directory using ADSI. It includes reading of Active Directory objects and generating the XML file, parsing the XML file and creating objects in Active Directory, parsing the XML file and generate a MFC TreeViewControl.
- Coreport - My responsibilities involved debugging and Enhancement suggestions of Java API that is provided by Coreport, Junit is used as one of testing tools. I was also involved in localization of the product in different languages like Japanese, Korean and other western languages.
- Online Program Management (OPM) - My responsibilities involved design, development and deployment of project. My tasks include conversion of interfaces into Canadian French language.
- SCIP Conversion - My responsibilities involved design, development and implementation of project as developer in the team. Identified objects / functionality in ASP model that translated to EJBs, Servlets and JSPs, and coded all these to deliver functionality on WebSphere. IBM VisualAge for Java was extensively used for debugging in the project.

**EDUCATION**

- Diploma in Business Management (ICFAI University)
- PG Diploma in Computer Application (Madurai University)
- Masters Diploma in Computer Science (Datapro Info Tech)
- Bachelor of Commerce (University of Mumbai)