**SUGANDHA JOSHI**

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**PROFESSIONAL SUMMARY:**

* Over 3 years of experience working as Salesforce Business Analyst/Administrator with hands on experience in implementation and configuration of Apttus CLM, Apttus CPQ and Salesforce CPQ projects on Salesforce platform.
* Experienced in working with clients to map out their existing Business Processes and involve in gathering business requirements from sales/marketing team and business analysts by performing detailed analysis of business and technical requirements and designing the solution by customizing various standard and custom objects of Sales force to provide system-based solutions that increase efficiency and reduce operating costs.
* Interaction with clients on day-to-day basis by presentation of demos, discussion of requirements, and lead UAT,
* Acted as liaison between client and developer in order to get requirements done as expected and deliver the action items on time.
* Strong Requirements gathering experience by designing Business Requirements Document (BRD), Use Case Document, User Stories, and Functional Requirement Document (FRD).
* Created page layouts, search layouts to organize fields, custom links, related lists, and other components on a record detail and edit pages.
* Implemented pick lists, dependent pick lists, lookups, junction objects, master detail relationships, validation and formula fields to the custom objects.
* Possess comprehensive understanding of CRM business processes like Campaign Management, Lead Management, Account Management, Case Management, Quote, Forecasting.
* Skilled in customizing standard objects like Accounts, Contacts, Opportunities, Products, Price books, Cases, Leads, Campaigns as per client’s need.
* Experience in data migration from Excel, MS outlook and Legacy Systems using Data Loader, Import Wizard, Apex Data Loader
* Configuration of Templates using Apttus X-author.
* Expert in generating and analyzing custom reports and dashboard for management and various business unit personnel to provide detail information on key performance indicators.
* Developed process enhancements through automations including Workflow, Approval Processes, and Escalation Rules.
* Experience in SalesForce Testing and Administration spanning all facets of package software and SaaS application implementation.
* Configured Products, Bundles, Price Lists, price Matrices across all products.
* Strong knowledge & experience working in teams implementing Agile Methodologies.
* Excellent communication and inter-personal skills, accustomed to working in both large and small team environments.

**WORK EXPERIENCE**

**Salesforce Business System Analyst | CLM/CPQ SME | Configurator | Administrator**

**Cloudely Inc. , Sunnyvale, CA** June ’18 - Present

Client: **Couchbase** Jun ’18 – Sept ‘18

Role: **CPQ Configurator**

Responsibilities:

* Configured Products, Bundle, Catalog, Price list for all Couchbase products
* Designed pricing factors like price list, attribute based pricing, discount schedules
* Performed configuration for product setup, approval rules, process builder, workflows
* Employed advanced approvals to simplify approval process
* Setup Multi currency pricing for 11 currencies

Client: **BioFire** Sept ’18 – Dec ‘18

Role: **CPQ Admin**

Responsibilities:

* Setup Subscription based products for 3 BioFire products
* Built 3 new acquisition method configurations, adding, and removing products, changing discounts
* Contributed to end to end QA testing and validation of CPQ including products, pricing, pricebooks, quoting
* Provided support and system administration to quickly fix end user issues

Client: **American Psychological Association (APA)**  Jan ’20 - Present

Role: **CPQ Tester**

Responsibilities:

* Configured Products, Bundles, Price Lists across all APA products
* Managed Quote-to-cash life cycle resulting in generation of invoices
* Implemented Apttus Advanced Approvals based on the discount resulting in quote generation
* Created Inbound and Outbound Change sets for deployment in production environment

Client: **Human Good** July ’19 – Dec ‘19

Role: Salesforce Admin/ CLM

Responsibilities:

* Configured tags for e-signature with Adobe sign for easier signing experience
* Template configuration and testing for Agreement templates using Apttus X-author plug-in
* Deployed and tested Templates in Sandbox and Production

Client: **Kira Systems** Jan ’19 – May ‘19

Role: Integration

Responsibilities:

* Leveraged AI for processing, viewing and extracting meta-data of the document as a part of product development team
* Integrated to push the data into Salesforce for purpose of record creation and storage
* Extracted values from documents and exported in form of Word, Excel and pdf

Client: **NorthStar Financial Services Group (Gemini)** Sept ’18 – Dec ‘18

Role: Billing Implementation

Responsibilities:

* Calculated invoice for various clients for use cases – Fund Accounting, Fund Admin, Transfer Agency
* Designed the solution document to prepare Business Requirements, High Level Process flow, Invoice Generation

Client: **Gateway Casinos** June ’18 – Sept ‘18

Role: Salesforce Administrator/Analyst

Responsibilities:

* Extracted data from Kira Tool for numerous Agreement types – NDA, Vendor, Consulting,

Material and Operation

* Data migration from sandbox to production environment using Data Loader

**INTERNSHIP**

**Cloudely Inc. , Sunnyvale, CA** May ‘17 – Dec’ 18

Role: Salesforce Intern - Admin/tester

Responsibilities:

* **Contracts I/O Wizard product:**
* Leveraged the product tool to map the fields between Salesforce Object and the extracted fields from Kira Systems.
* Extracted values and created an agreement with click of a button into the Salesforce instance
* **CloudSync product:**
* CloudSync-M used for migration of data from Sandbox to Production or vice-versa (migration tool between SFDC environments)
* CloudSync-R is the powerful tool which will help in managing platform releases, App releases
* **Human Good CLM QA Testing:**
* Managed setup of overall system for 4 different process flows includes all salesforce configurations.
* Implementation includes high level of record sharing, which was implemented properly as requested     by client.
* Prepared all training documentation, Test Case Document as well as Solution Design Document.

**SKILLS**

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| **hSS****SFDC** | Users, Profiles, Roles, Apps, Tabs, Permission Set, Page Layouts, Objects, Fields, Queues, Record Types, Field Level Security, Sharing Rules, Validation Rules, Approval process, Process Builder, Workflow rules, Reports & Dashboards |
| **CPQ** | Price Rules, Pricebooks, Product Rules, Product Bundles, Product Option, Configuration Attributes, Discounts, CPQ Pricing Methods, CPQ Orders, Amendments, Renewals, Quotes, Advanced Approvals  |
| **Salesforce Solutions** | CLM, CPQ, Billing, X - Author, Kira, Cloudsync, Apex DataLoader, Salesforce Workbench, Adobe Sign, Sales Cloud,Service Cloud, Salesforce for Mobile |
| **Operating System** | Windows 10/8/7/XP, UNIX/LINUX, Mac |
| **Management Tools** | MS Project, MS Office, MS Excel, MS Outlook |
| **Programming Languages** | DBMS, SQL |

**CERTIFICATIONS**

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|  **SALESFORCE** | Salesforce Certified CPQ Specialist |
| Salesforce Certified Advanced Administrator  |
| Salesforce Sales Cloud Consultant |
| Salesforce Service Cloud Consultant |
| Salesforce Certified Platform Developer I |
| Salesforce Certified Administrator |
| **CONGA** | Conga Contracts  |
| Conga Contracts for Salesforce Administrator |
| Conga Composer |
| Conga Sign |

**EDUCATION**

Northeastern University, Boston, MA GPA: 3.54/4.0

Master of Science, Telecommunication Systems Management May 2018

Courses: Data networking, IP telephony, Telecommunication Architecture, Internet of Things(IoT), Linux

Jodhpur Institute of Engineering & Technology, Jodhpur, India Grade: Honors

Bachelor of Technology, Electronics & Communication Engineering (ECE) May 2014

Courses: Telecommunication Engineering, Wireless Communication, Optical Communication, Analog & Digital communication