

SWATI JOSHI

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Lead Business Analyst with over 6+ years of work experience in Insurance and Banking, Systems/ Solutions Engineering, Strategic Planning and Systems Analysis. Extensive experience in communicating with Subject Matter Experts (SME's), performing Requirements Gathering, Business Analysis, Data Analysis and Documentation.

SUMMARY:

- 3X-Salesforce certified Business Analyst (**Salesforce Certified Marketing Cloud eMail Specialist, Salesforce Certified Advance Administrator, Salesforce certified Administrator**).
- Certified Professional Scrum Product Owner (**PSPO-I**) and Certified Professional Scrum Master (**PSM-I**)
- IIBA certified business analyst (Certification of Competency in Business Analysis(**CCBA**) & Entry Certificate in Business Analysis (**ECBA**))
- Extensive experience working in **Insurance (Group Disability, Dental, Life & Annuity etc.), Banking operations and anti-money laundering.**
- Excellent knowledge in **Property and Casualty** insurance, **Policy Admin system, Claims Life cycle.**
- Extensive experience in gathering requirements with strong Co-ordination with **Business Owners, Developers, Testing Team and End Users.**
- Extensively worked in all phases of **Software Development Life Cycle (SDLC)** deliverables.
- Good experience with **documenting requirements** and translating into effective Business design.
- Proficient in creating **Business Requirement Documents (BRD), Functional Specification Documents (FSD), UAT documents** and training manuals.
- Experience in analysis of **as-in** system and make recommendations for improvement in **to-be** system.
- Experience in reviewing **Test Procedures**, defining **Test cases**, reviewing and maintaining Test scripts, analyzing bugs, interacting with team members in fixing errors and **User Acceptance Testing (UAT).**
- Experience in performing **Feasibility analysis, Risk Analysis and Gap Analysis.**
- Excellent analytical and problem-solving skills and a team player with **strong interpersonal and communication** proficiency.
- Proficient with **Structured Query Language (SQL)** to retrieve, modify and manipulate data from IBM-DB2 and MS SQL.
- Good understanding with **Project management** activities, from defining project initiation to Project closure.
- Excellent Knowledge in the areas of **Business and Web based Applications.**
- Involved in the **UAT prerequisites, planning, designing UAT test cases, documenting defects found during UAT, resolving issues/bugs fixing, sign off.**
- Involved in Interfacing with clients from Operations, Marketing, Sales, Technologies, and Outside Vendors and act as their customer interface point as lead of various projects.
- Experienced with creating **Unified Modeling Language (UML)** diagrams using MS-Excel, Visio such as use case diagrams, business process flow diagrams, activity diagrams, class diagrams and sequence diagrams.
- Used project management tools like **MS-Project** for status reporting and planning.
- Experience and in-depth knowledge of **Agile Software development** technique
- Excellent experience in **Life and Annuities** insurance.
- Excellent working knowledge on **Group Disability** (Short term Disability (**STD**), Long term Disability (**LTD**), New York Paid Family Leave (**NY-PFL**), Family & Medical Leave Act (**FMLA**), Americans with Disabilities Act (**ADA**).

TECHNICAL EXPERTISE:

Project Management	Rally (CA Agile Central), PPM, MS Office Suite, MS Project, JIRA, Visual Studio
Business Modeling Tools	MS Visio, Adobe Analytics.

Service Management	Service Now
Testing Strategies	Unit, Integration, System, Black Box, White Box, UAT, Sandstorm,
Version Control Tool	PVCS
Database	IBM-DB2, MS SQL Server 2014, MS Access
Environment	Win 95/98/2000/XP/Vista/7/8/10
Applications	Salesforce, Salesforce Marketing cloud.

PROFESSIONAL EXPERIENCE:

Client: Deloitte, Hyderabad, India

June 2021 – Present

Role: Senior Business Analyst

Project Scope: Currently working in Deloitte as a Senior Business Analyst in their Digital transformation project. The project is a bold new shared vision and multiyear roadmap for Deloitte.com. Currently their website has 142 localized urls and contents are displayed based on the user's location. The project is to create a unified, singular web experience across the globe.

Responsibilities:

- Working with a global team on major global initiative to plan and monitor business activities during the project to shape the global digital marketing agenda.
- Working closely with Digital product, platform and adoption product management team.
- Understand the business strategy and objective by studying the business function, gathering information and evaluating output requirements and formats. Elicit and documents requirements to meet business needs.
- Managing the progress of project by tracking activity, resolving issues and recommending actions.
- Lead regular status meetings to connect project threads, uncover potential risks/issues and track progress.
- Provide regular updates to senior management on deliverable timeline and project status.
- Direct and monitor business analysis activities to ensure the traceability and optimum coverage of business requirements with CR backlog.
- Creating training materials for business users and sharing internally and externally through team collaboration sites.
- Documenting requirements in visual studio and creating process flows.

Employer: MetLife GOSC, India

Dec 2020 – May 2021

Role: Assistant Manager - Business Analyst

Project Scope: Worked in MetLife GOSC as Assistant Manager-Business Analyst in MetLife UP Market Digital (USD) project which will replace the current legacy application MetLink and will create a digital experience that will streamline benefits management for MetLife's up market customers and improves the servicing experience for the employers and MetLife internal users. I have been working on enrollment, endorsement, Statement of Health, Claims (Disability intake and inquiry) requirements for employer experience portal. The project (USD-Employer Experience) started from December-2018 and I have been involved in the project from day one from onsite. Since I had some Visa issue and came back to India, MetLife GOSC hired me in the same project in India as Assistant Manager-Business Analyst.

Responsibilities:

- Led a team of 3 business analysts.

- Acted as the **primary liaison** between the **Business Units, Information Technology (IT) and 3rd party vendors**.
- Work collaboratively to **design, manage, and review requirements and capabilities** with globally dispersed teams.
- **Interviewing business units, stakeholders and technical leaders** to gather and clarify business requirements
- **Review and analyze** the effectiveness and efficiency of existing systems and **develop strategies** for improving or further leveraging these systems.
- Create **systems models, specifications, diagrams, and charts** to provide direction to system programmers.
- **Lead design sessions** in prototyping new systems for the purpose of **enhancing business processes, operations, and information process flow**.
- **Lead planning meetings, JAD sessions** (Joint Application Design), analysis development, **test inspections**, and other project meetings throughout product life cycle.
- Provide clear and concise **documentation** regarding **functional & non-functional** requirements as well as **business rules**.
- Prepare and deliver **reports, recommendations**, or alternatives that address existing and potential trouble areas in operating systems across the organization.
- Coordinate and perform **in-depth tests**, including end-user reviews, for modified and new systems, and other **post-implementation support**.
- Performed **SLA** to record common understanding about services, priorities, responsibilities, guarantees, and warranties as well as each area of service scope were "level of service" defined.

Client: MetLife, New Jersey, USA

Dec 2018 –Feb 20

Role: Lead Business Analyst (Oct 2019 – February 2020)

Business Analyst (Dec 2018 – Sep 2019)

Project Scope: Worked in MetLife UP Market Digital (USD) project which will replace the current legacy application MetLink and will create a digital experience that will streamline benefits management for MetLife's up market customers and improve the servicing experience for the employers and MetLife internal users. I have been working on enrollment, endorsement, Statement of Health, Claims (Disability intake and inquiry) requirements for employer experience portal. The project (USD-Employer Experience) started from December-2018 and I have been involved in the project from day one.

Responsibilities: Lead Business Analyst (Oct 2019 – Feb 2020)

- Led a team of 6 business analysts (3 Onsite and 3 GOSC resources)
- Acted as the **primary liaison** between the **Business Units, Information Technology (IT) and 3rd party vendors**.
- Worked collaboratively to **design, manage, and review requirements and capabilities** with globally dispersed teams.
- **Interviewing business units, stakeholders and technical leaders** to gather and clarify business requirements
- **Review and analyze** the effectiveness and efficiency of existing systems and **develop strategies** for improving or further leveraging these systems.
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Responsibilities: Business Analyst (Dec 2018 – Sep 2019)

- Involved in understanding the "**As-Is**" business process. Created models of "**As-Is**" and "**To-Be**" **business processes**.
- Interact with the "Users" by interviewing them, by preparing questionnaire and getting feedback.
- Perform feasibility, adaptability study and analysis to identify the business-critical areas from the user perspective.
- **Gathered Business requirements** & converted them into **Business Requirement Documents (BRD)**.
- Performed in **depth Gap analysis** with different business groups to ensure that the system initiatives are met.
- Interacted with Business users, SMEs and created the process requirements and involved in discussions with UX and development team to explain the flow of future data modules.
- **Develop Use Cases, Use Case diagrams**, business flow diagrams, Activity/State diagrams and Sequence diagrams so that stake holders can understand the business process.
- **Worked with UX team** to create the interface design and look & feel of the screens.
- Worked with copy-write team to create the golden copy of the BRD.
- Interacted with Subject Matter Experts, Program Managers, Developers, and facilitated **JAD sessions**.
- Provide clear and concise **documentation regarding functional & non-functional requirements as well as business rules**.
- Worked closely with developers to clarify/understand functionality, resolve issues and provided feedback.
- Worked as a User/Customer advocate and negotiated with user as well as with developers and management staff to resolve any requirement conflict to **bridge the gaps between IT and business**.
- Performed SLA to record common understanding about services, priorities, responsibilities, guarantees, and warranties as well as each area of service scope were "level of service" defined.

Employer: HSBC, Kolkata, India

Jan 2015 – July 2015

Role: Fraud Analyst

Responsibilities:

- Worked as **fraud analyst** in fraud detection department.
- Monitoring day to day transaction and **analysis of fraud scores**.
- Investigate and **assess alerts** for potential **money laundering risks** in the Bank.
- Ensure efficient **identification and monitoring of suspicious activities** and transactions.
- Ensure timely, efficient reporting of suspicious transactions to AML Compliance Officer
- Responsible of **fraud detection for US customer's** debit and credit card.
- Job includes **implementing strategies** (for debit and credit card) by **monitoring recent fraud trends**.
- Assist customers with **online banking**, statement questions and **general customer services**.
- Responsible for compiling and analyzing **KYC** profiles for new business relationships to ensure all regulatory and bank policy requirements are fully met.

Employer: AXIS Bank, Indore, India

July 2012 – Oct 2014

Role: Banking Operations (Front Desk Officer)

Responsibilities:

- Worked on various banking transactions like **teller, check processing, opening of accounts, NEFT, RTGS, inventory management, Reconciliation of office accounts, cash management, risk management** etc.
- Dealing with customers **face-to-face**, over the telephone or in writing;
- **Processing paperwork** from sales, change of customer details, closure of accounts and so on;
- Processing of salaries of corporate employees every month.
- **Handled High Net worth Individuals (HNI)** customers for the branch.
- Familiar with monitoring **banking regulations for audit purpose**. Preparing audit reports and cases of common errors.
- Responsible for compiling and analyzing **KYC** profiles for new business relationships to ensure all **regulatory and bank policy** requirements are fully met

Employer: HDFC, Indore, India

Feb 2011 – June 2012

Role: Phone Banking Specialist for Premium Customers

Responsibilities:

- Assisting all **portfolio based customers** over the telephone or in writing;
- Assist Customers with **online banking, statement questions and general customer service** over the phone
- Monitoring of high value transactions.
- Enter transaction data in proprietary banking systems.
- **Profiling of customers** based on the average quarterly balance of the existing customers.
- Functioning as per **service level agreement** set for Private Banking and **achieving 99% targets**

Employer: Kanchrapara Degree College, North 24 Parganas, India

July 2009 – May 2010

Role: Assistant Lecturer

Responsibilities:

- Taught biochemistry, microbiology, molecular biology and genetics to graduation students.
- Evaluating projects.

CERTIFICATES:

- Professional Scrum Product Owner (PSPO I)
- Professional Scrum Master I (PSM I)
- Salesforce Marketing Cloud Email Specialist
- Salesforce Advance Administrator
- Salesforce Administrator
- Certification of Capability in Business Analysis (**CCBA**)
- Entry Certificate in Business Analysis (**ECBA**)

EDUCATIONAL QUALIFICATION:

Examination	Board/University	Year of passing	Percentage
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Master of Science (Bio Tech)	Calcutta University	2008	69%
Bachelor of Science (Botany)	Calcutta University	2006	64%
Higher Secondary Examination	West Bengal Board of Higher Secondary Education	2003	71.3%
Secondary Examination	West Bengal Board of Secondary Education	2001	84%

KEY SKILLS AND STRENGTH:

- Good communication skills (written & verbal).
- Strong visualization, problem solving and analytical skills
- Excellent interpersonal skills
- Exceptional motivational and leadership skills.
- Remarkable patience with reliability and responsibility.
- Ability to make a strong and healthy relation among the employees.
- Flexibility and the ability to adapt to changes in the short and long term.

Personal Details:

Date of Birth : 21-May-1985
Language Known : English, Hindi, Bengali.
Nationality : Indian
Marital status : Married

Few References from my previous managers (from LinkedIn - <https://www.linkedin.com/in/swati-joshi-035aa6b5/>):

Chris Rice (AVP Innovation and Transformation at MetLife): Swati has been a tremendous resource to our Digital Transformation team at MetLife. She had the challenge of replacing a very senior BA with over 20 years' experience. Swati quickly came on board and not only quickly developed the business relationships to maintain requirement timelines; she also distinguished herself as a leader for the team. Swati quickly became the go to person on the team for technical design questions, issues and risks and now assists other BAs in meeting our aggressive timelines. Her willingness to step up and assume ownership at a leadership level given her limited tenure makes her one of the top BAs I have worked with in my 25 years of program governance.

Kevin Smith (Digital Transformation Leader, Director at MetLife): I had the opportunity to have Swati be part of my Digital Transformation team at MetLife. She played a critical role in developing relationships with our primary business partners from National & Regional accounts and becoming a SME to represent our business partners.

She works well with both IT and Business and does a great job delivering a quality product. She's got strong background in group business products & web portals.

Thomas DAlessio (Director Program Management at MetLife): Swati joined our team as a BA, and has done an outstanding job supporting our Digital Transformation efforts. She quickly came up to speed in a complex environment, took ownership of critical functions, and has become an indispensable contributor to our success. Swati's ability to self-train and quickly learn complex systems has been exemplary. Having Swati join our team is one of the best people decisions I have ever made.

Joe Giacoio (Project Manager(ex) at Metlife): Swati quickly established herself as an invaluable resource on our very complex and high pressure project. With excellent Business Analyst skills she quickly ramped up and became one of the lead Product Owners. This is not to be taken for granted, as other resources were not able to acclimate to this exceedingly complicated environment. Swati rose to the occasion and is now one of the senior members of our team and helping to mentor new team members.