APTTUS®

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Summary

Thirty plus years of experience as Solution Architect, Project manager, Business analyst and technical lead in the areas of: Contract Lifecycle Management (CLM), CPQ (Configure Price Quote), CRM - Customer Relationship Management, Partner Relationship Management, Marketing Relationship Management and Enterprise Resource Planning. I have designed client-tailored business solutions, and implemented complex, integrated system architectures. Supported clients with requirements management, and also managed project activities. Experience managing virtual teams (business + IT) with a size of up to 30+ team members worldwide, ability to bridge multiple time zones and continents. I have a versatile ability to build strong teams with a high rate of retention and project rigor. I was instrumental in advising the clients on various technical issues, partake actively in technical /business top-level meetings and helped produce technology outputs within envisaged monetary budgets and in given time frame.

Education

Bachelor of Engineering (Hons) Electrical & Electronics, **BITS**), June 1990 Pilani, India (BITS is India's premier school of Engineering)

Training and certification

Apttus/Conga Quote To Cash (CPQ+CLM+OM)
Salesforce CRM and cloud computing
Siebel eBusiness applications at **Pricewaterhousecoopers**, PA
Amdocs/Clarify efront-office at Clarify Inc, MA
Scopus Applications at Scopus Technologies, California
Vignette Web Applications at Vignette, NY

Technical Skills

CPQ/CLM/SRM:

- **Salesforce CPQ/ SteelBrick**
- **Conga/Apttus 10.x – Configure, Price, Quote (CPQ); Contract Management (CLM) & Supplier Relationship Management (SRM)**
- **DocuSign CLM / SpringCM**
- **Emptoris 7.x/9.x/10 – (IBM / Dicarta) Contracts module**

CRM/PRM:

- **Salesforce Sales/Service Cloud**
- **Siebel SFA/S/Marketing/ Call Center/ Sales / Service / Email Response/ Incentive compensation /E Channel / SSSE (99) ver 5.5/6.3 (2000) /7.0.3./7.5/7.7/7.8 / 8.1**
- **Scopus Applications (ver 3.6/3.8/5.0/5.2/5.3) - Support Team, Service Team & Call Center.**
- **Clarify efrontoffice sales/ Call center/Support/Contracts ver 5 /8/10.**
- **Vignette solutions for Business Users.**
- **Oracle R12 Sales Contracts.**

Database Software:

- **Oracle** 7.3 / 8i / 9i RDBMS, Oracle Developer 2000 Tools, SQL*Plus, PL/SQL, Reports 2.5;
- **Oracle Financial Applications** 10.4/10.7- General Ledger, Accounts Receivable, Accounts Payable, Inventory, Purchasing, Order Entry and Assets;
- **Marshall** Material's management & Accounting System.

Data Quality
- **Trillium, First Logic & Siebel SDQ**

Methodologies - Software Development Life Cycle (SDLC), Rational Unified Process (RUP), Agile & Waterfall

Documentation - Business Plan, Use Case, Test Case, Project Plan, Activity Diagram, Data Flow Diagram, Workflow Diagram, Use Case; Business Use Case; System Use Case and Test Case Diagrams, User Manual, Release Notes, Process Diagram, Requirements Management Plan, Future State Diagram, Systems Requirement Specification, Business Needs & Features Document

Other Applications:
MS Excel, Word, Visio, PowerPoint, Project.

General:
Excellent Leadership, Interpersonal, supervisory, trainer, communication and strong analytical, Development & decision making skills, perform independently as well as work in project team.

Experience evaluating, selecting, implementing, and integrating technology tools into a client solution.

Professional Experience
Project 29: Salesforce CPQ/DocuSign CLM (aka SpringCM)
Client: Sovos/EY, Boston, MA   **May, 2022 to date**
Role: Solution Architect
- Worked as QTC lead supporting CPQ and SpringCM processes. This was a EY's assessment and enhancements project. Sovos was having issues with Product Configurations, Pricing, Contracting and Invoicing.
- Worked very closely with business stakeholders and management team to define the processes improvements and bring in efficiency.
- Reviewed CPQ and CLM processes and presented areas to be corrected and next steps.
- Worked on Ramped Deal (MDQ) functionality to support mid-term price increases.
- Worked on fixing Pricing Issues, created discount schedules and associated correcponding SKUs.
- Created custom Quote Templates in CPQ.
- Worked on Salesforce Advanced Approvals, created Approval rules, Chains and dynamic approvers.
- Worked on custom flows to support defaulting metadata for Amendments and Renewals.
- Worked on Proration, Co-terming and mid term upgrade process changes.
- Defined Sales Order processes to support NetSuite transactions.
- Defined the agreement workflows for MSA and MSLSA agreements , tasks and approvals in DocuSign CLM.
- Worked on Data synchronization between Salesforce(contract) and SpringCM
- Worked on Docusign eSignature process improvements and custom tags.
- Configured Contract templates with merge tags and conditional clauses
- Worked on automation to pick the template based on the Quote metadata.
- Worked on DocuSign CLM eSignature automation, defaulting recipients based on contracting entities and regions.

Project 28: Apttus-Conga CPQ/ CLM
Client: NetJets, Columbus, Ohio   **Feb, 2022 to April, 2022**
Role: Solution Architect / Lead

- Worked on migration of legacy contract data from a homegrown system supporting Americas and Europe Business Units
- Responsible for managing development team and analysts both onsite and off-shore. Supported CPQ and CLM functional processes developed by the Software vendor.

- Worked on transforming legacy CLM data mapping against CPQ and CLM business objects.
- Worked on streamlining data to support Asset Based Ordering in the Target System.
- Worked on Aircraft Tail Number/ Asset mapping for the migration.
- Supported and reviewed Contract ID mapping and migration
- Supported Lease/Share sales models in data transformation, mapped to new proposal and agreements.
- Worked on Renewals, Substitution, Cancellation, Aircraft Assignment, Aircraft Upgrade and Moratorium processes.
- Worked on Auto creation of Opportunity, Proposal, Agreement, Order and Assets based on the status of the legacy contracts. Configuration of the aircraft was mapped to the contract process, type of aircraft and business unit.

Project 27: Salesforce CPQ/DocuSign CLM
Client: NewRelic/EY, SFO, California   **Oct, 2021 to Jan,2022**
Role: Solution Architect
- Was a replacement SA to address the QTC needs of EY at Newrelic.
- Worked on CPQ/CLM process mapping from Apttus to Salesforce / Docusign CLM (clm cloud). Created as is processes and to be process flows. Presented processes and the user experience / adoption requirements.
- Worked very closely with business stakeholders to define the processes improvements and bring in efficiency.
- Worked on Custom CPQ objects and Opportunity + Contract object attributes to define the CLM Agreement and OF/SOW attributes.
- Defined the agreement workflow , tasks and approvals in DocuSign CLM.
- Configured Contract templates with merge tags, conditional clauses and Product / Quote / Quote Lines table.
- Worked on automation to pick the template based on the Opportunity metadata.
- Worked on DocuSign CLM eSignature automation, defaulting recipients based on contracting entities and regions.
- Worked on Approvals in CPQ and in DocuSign CLM.

Project 26: Salesforce CPQ
Client: ThycoticCentrify/EY, Santa Clara, California   **June, 2021 to Oct, 2021**
Role: Solution Architect

- Worked in a leadership role on a Digital Transformation & Salesforce Org migration, consolidation and standardization project for EY. Responsible for leading the CPQ design phases of the project to ensure that the proposed solution architecture supports the business requirements.
- Involved in discovery sessions with the client to understand the current state processes, helping the client to transform existing processes into future state business requirements and translating them into technical solutions, and delivering them in the form of Solution Design Document and process flows.
- Worked on CPQ process harmonization and standardization, data Quality and Data Governance. Updated CPQ settings and incorporated data changes to support revised Proration condition.
- Worked on Product configurations related to 1:1 and 1:M(POT) Support models. Created Product Rules, Price Rules, Summary Variables etc to support new product structure and EOS product substitution. Defined Product hierarchies, Option Constrains, Option configurations, Discount Schedules and Tiers.
- Worked on Advanced Approvals, created several approval chains, rules and approval variables.
- Worked on Custom Quote Templates to support Standard Quote and MYA/MDQ quotes. Used Conditional sections, content, Quote Terms to create business specific Template outputs.

- Worked on Price Books for various sales orgs, supported multi currency structure and defined Pricebook defaulting rules based on user org.
- Worked on Price Book Entries for the new organization and currency mark-ups.
- Worked on Multi Year Agreements/MDQs, contract based renewals and Bundle upgrades, splits, Co-term, Cancellations and Credits.
- Supported release and deployment activities. Defined a detailed cutover plan for the UAT and Product deployment and migrations.
- Worked on migration of data from one salesforce org to an other. Used dataloader extensively. Proposed several data rules to keep data integrity.
- Ran reports to review Accounts, Contacts, Opportunities, Opportunity Contacts, Quotes, Quote Lines, Quote Line Groups, Products, Price Books, Product Rules, Price Rules and other CPQ field metadata.
- Supported Netsuite integration and third party fulfillment activities in salesforce.

Project 25: Apttus CPQ / CLM, DocuSign CLM
Client: DocuSign/Apttus, SFO, California   Jan 2021 to June, 2021
Role: Solution Architect

- Worked in a leadership role on Custom enhancements CPQ Apttus application integrated with DocuSign CLM(SpringCM). Docusign was using 2017 winter edition of CPQ and CLM. Translated business requirements into well-architected solutions that best leveraged 85% Apttus CPQ OOTB functionality on Salesforce -Sales & Service Cloud.
- Worked on detailed CPQ design, solution architecture, prototyping, proof-of-concepts, and development tasks for migrating CPQ functionality to new 2020 Winter edition. POCs included advanced renewals, Multi year contracts, price ramps and pricing based on configurable attributes.
- Reviewed and proposed application usage and licenses' optimization to help reduce licensing costs.
- Worked on Subscription Product configurations, Price Lists, PLIs, Price Dimensions, Price Matrices and Validation Rules.
- Worked on Master Agreement / OF / SOW Templates for Americas, EMEA and France entities. Built complex rollups and conditional clauses, used merge tags.
- Built clause library and alternate clause relationships, addresses scores to estimate risk factor during reconciliation process.
- Worked on custom DocuSign integration to sync customer entered data (anchor tag reference) back to Apttus Quote Object from the attachment received in the envelope.
- Worked on custom process to default contracting entity, supported pricelists and language based on user profile, Sold To and related Sales Entity.

Project 24: Salesforce CPQ, Apttus CLM , 365 Dynamics
Client: KOFAX/TB, Irvine, California   Oct 2020 to Jan,2021
Role: Solution Architect

- Worked in a leadership role responsible for conceptual Quote To Cash architecture on Salesforce platform (sales cloud/service cloud) including Salesforce CPQ(SteelBrick), Apttus CPQ, CLM and OM.
- Collaborated with Key CX stakeholders to define the QTC architecture roadmap and support the selection of technologies, integration patterns and data interoperability to all KOFAX and NDI(acquisition) seamlessly integrate and operate globally on one platform with global selling capabilities, both direct and indirect/channel (partner business).
- Recommended new technologies that would not only meet the project requirements, but also align with business objectives, strategic solutions and overall enterprise landscape.
- Reviewed and used Gartner and Forrester Industry/functional standards and customer reviews in presenting key application solution proposals.
- Delivered architecture documents, architecture patterns, decisions and rationale for all the key decisions made.

- Worked on application migration strategy from Dynamics 365 and Apttus to Salesforce CPQ and Netsuite applications. Defined data quality standards, data governance and data management.
- Worked on functional mapping of data between systems, define current vs to be data flows.
- Worked on Dell Boomi integration layer for data exchange between various parent and child systems.
- Worked on Product configuration definitions, Constraint rules, Price books and pricing/discounting rules.
- Worked on MDQs, Renewals, Cancellations and reinstatements, Cross sell / Upsell, co-term and asset based ordering in CPQ.

Project 23: Apttus CPQ, CLM , IBM Emptoris CLM Migration
Client: IBM/Apttus/Veteran Affairs   Oct 2019 to Oct,2020
Role: Solution Architect

- Worked in a leadership role on Custom CPQ & Contract Management System using Apttus to support Legal, Financial and Provider Services in Healthcare.
- Designed and developed Custom CPQ / CLM process to Provider Care and Community Care Networks in 14 US States.
- Worked on detailed technical design, solution architecture, prototyping, proof-of-concepts, and development tasks.
- Worked on scalable solutions based on the business requirements. Identified, documented and published technical gaps.
- Worked on Apttus Advanced Approvals based on State Criteria and Discounts. Processed approval requests with attachments, auto reapprovals, consolidated approvals, serial and parallel approvals.
- Worked on constraint rules to conditionally include, exclude, recommend, replace, or validate a product/service based on service categories added to the cart.
- Worked on auto synchronization with opportunity (syncing Quote/Proposal) and configured large Quote/proposal document generation.
- Defined custom Co-Term, Proration and future start date functionality.
- Worked on Cross Sell, Upsell/Down sell and swap scenarios.
- Worked on Cancellations & Credit memos.
- Configured Asset Management module to simplify renewals, updates and changes.
- Worked on custom proposal templates.
- Worked on agreement based renewals and auto renewals.
- Created a Provider credit check and credentialing process to check the ability of the provider to serve.
- Designed a low touch renewal process. Auto generation of renewal quotes and renewal opportunities. Worked on grouping rules.
- Worked on Advanced Approvals based on Service Type, State Segment and Specialty Type.
- Defined multi year contracts, rules for yearly mark ups and defaults.
- Defined the Asset/Subscription conversion and entitlements for each of the product types.
- Worked on CPQ flow settings, configured options and attributes in a single page.
- Worked on Revenue recognition types for various transaction types.
- Defined Price Lists and PLIs for each of the services offered.
- Worked on Migration of legacy contracts (212k records & 330k attachments) from IBM Emptoris to Apttus CLM.
- Built Agreement relationships in Apttus to present Parent child relationships for migrated data.
- Designed a custom Document Control Number for each agreement created to show the type of agreement, state of business, line of business and number sequence and additionally , to support the amendments.
- Created more than 30 templates and tens of clauses to support various agreement types, Amendments, lines of business and registered states. All templates were Docusign compatible.
- Worked with Legal team to simplify the clauses and other T & C's in the Base Agreement and Line of Business Agreements.

- Simplified contract generation process using conditional clauses and other terms. Defined Agreement Rules, Query Template rules and Docu Assembly rules to support various transactions in Apttus CLM.
- Defined processes and configured CLM to present legacy data as Business As Usual for the user.
- Designed process for bulk generation of Agreements in Apttus and mass sending the generated agreements using email or docusign.
- Designed custom API to bulk send thousands of docusign envelopes from apttus.
- Created workflows rules for auto processing incoming fully signed docusign agreements.
- Created processes to auto respond to inbound contract actions.
- Created custom reports to identify Docusign declined reasons, Docusign statuses, Agreement Language changes/redlined/inserted/deleted etc,
- Worked on Cycle Time reports for various agreement statuses for duration per Queue/Agreement Type.
- Worked on Mulesoft integration with Salesforce and Dynamics for conversion of leads.
- Defined and developed creation of Agreement requests from CRM Qualified leads and automating the assignment of queues.

Project 22: Apttus CPQ/CLM
Client: Thomson Reuters/Apttus , Minneapolis,Mn   Mar 2019 to Oct 2019
Role: Sr CPQ Consultant

- Worked on Global Quote To Cash (QTC) online subscription business process implementation for Content & Taxation products using Apttus CPQ/CLM on Salesforce – Sales & Service Cloud.
- Worked with Business Users to define stories/Epics/Features.
- Worked on Cancellation/Reinstatement of Assets/subscriptions due to payment/credit issues.
- Worked on Bundles(dynamic and static, unique to TR) and Options. Defined the rules for inclusion, exclusion, substitution and alternatives.
- Worked on new Quotes and cart rules for each product family. Initially, used XA for Excel to handle large carts. Modified the rules and processes after the bug was fixed by Apttus.
- Worked on subscription renewals, defined processes and rules for renewals for standard products and Multi year subscription products. Defined rules for auto renewals.
- Worked on Co Terming / Proration subscriptions for existing product subscriptions. Worked on non standard proration pricing rules.
- Worked on Pricing rules for various Products and Product Families.
- Worked on Asset based Ordering, created renewal quotes, price mark ups for each line item based on applicable rules.
- Worked on Asset management to Renew, Substitute, modify or Terminate Assets.
- Worked on Customer Credit validation process to check customer credit worthiness for credit terms.
- Worked on Product Catalogue for each region/Territory.
- Worked on Attribute based pricing.
- Worked on grouping rules for generation of renewal quotes.
- Worked on Asset management in SAP to support subscription billing.
- Worked on renewal modifications (Add/remove/substitute products).
- Worked on multi year agreements and define YOYs standard and non standard/custom YOY increases.
- Worked on Quote templates and integrated with DocuSign.
- Defined best Apttus OOTB solutions for CPQ and asset management processes.

Project 21: Apttus CLM (Part Time for Apttus**)**
Client: Apttus/ResMed(HealthCare) , San Diego/CA   Dec 2018 to Feb 2019
Role: Solution Architect

- Worked on part time basis as solutions Architect to guide, design and development of Enterprise Contract Management System to support Americas(HIPAA compliant), EMEA & APAC regions.
- Designed and developed Contract Wizards for external users and customers to submit agreement requests based on criteria based inputs leading followed by logical series of steps.

- Designed a seamless end to end low touch agreement generation process integrated with docusign.
- Worked on migration of legacy contract data and files using data loader(40K records).
- Worked on integration of sourcing records in Oracle with Apttus to support Procurement Contracts.
- Worked on Agreement Rules, Workflow rules and actions to automate some of the Contract sub processes.
- Designed and developed Agreement Templates(BAA,NDAs, Sales Contract, Procurement Contract, Service Contract, Facilities Contact etc), Clause library to support Global Sales and Procurement Contracts. All templates were configured with Docusign tags to support eSignature.
- Tools Used: Jira / Confluence (Apttus), Visio, MS Project etc

Project 20: Apttus CPQ/CLM , Salesforce CPQ(SteelBrick)
Client: Palo Alto Networks , Santa Clara/CA   **Oct 2018 to Feb 2019**
Role: CPQ Consultant

- Worked on Lead to Order online subscription business process implementation for Hi-tech security products on Salesforce platform (Salesforce CPQ/Steelbrick, Apttus CPQ/CLM).
- Met with user groups, defined project scope, requirements and dependencies. Worked on Apttus CPQ and Salesforce CPQ unified process and migration roadmap (Apttus to Salesforce CPQ).
- Performed Direct Vs Channel sales models for software subscription products.
- Created detailed business process flows for Product Trial, Buy, Trial & Buy, Renewals and Upsell/Cross-sell/downgrade & approvals.
- Defined detailed requirements for online market place for Online Subscriptions and Partner referrals.
- Used Agile methodology, created Epics and User stories using Jira. Groomed stories with business users and functional teams, set story points and sprint velocities.
- Worked closely with Scrum master and Product owner for defining stories and identifying dependencies.
- Documented CPQ objects, data definitions and data flows in Confluence.
- Worked on Account Management process, Creation, Cleansing, Address validation & Standardization.
- Worked on business rules to define Auto Renewals, Co Terming, Prorate and future date functionalities for all products sold on Marketplace.
- Worked on Asset Based Ordering to support renewals, Renewal Quotes and Opportunities.
- Defined validation rules for products and pricing in the cart.
- Defined Product discounting models based on product selection criteria and pricing tiers.
- Defined rules for Quote collaboration and generation of Quote and presentment via docusign
- Worked on Products and Pricing, Shopping Cart functionality, Quoting and Quote Templates
- Worked on Advanced Workflow Approvals and eSignature process using DocuSign.
- Supported UAT and design validation tests.

Project 19: Apttus SRM/CLM (Source To Pay)
Client: Apttus/USAA ,San Antonio, TX   **June 2018 to Sept,2018**
Role: Solution Architect

Worked on Apttus Source to Pay(STP) end to end process through Apttus Professional Services . This is the only client to implement Apttus SRM and CLM.

- Worked with cross functional teams, facilitated workshops/on-line presentations with business users to capture requirements for implementing both Procurement & Sales contracts using Apttus CLM solution.
- Documented all processes flows, reviewed the same with business. Defined future state process models using Apttus. Created detailed flow diagrams.
- Captured requirements for SRM – Sourcing and CLM modules. Used Apttus Jira tool to capture all the requirements for each module and object. Created build tasks for development team.
- Managed Apttus design workbook with all development content (Fields, pick lists, page layouts, notifications, tasks, security settings, code, validations etc).

- Configured the application to present the SRM and CLM functionality to Business users (Legal, Sales & Procurement).
- Worked on Apttus Wizard to create Prospective Supplier Registration, Survey and Supplier Onboarding.
- Worked on Apttus Supplier Portal for new and prospective suppliers.
- Worked on processes related to Onboarding, Sourcing Events which included Event preparation, Identifying stakeholders, shortlisting suppliers, RFI, RFQ, Supplier Evaluation, Setting Sourcing Event phase milestones and shortlisting suppliers for Awarding Contracts.
- Worked on Apttus Contract Wizard to create MSA, Corporate, Stand-Alone and dependent Agreement types based on predefined questions and risk assessment scores.
- Worked on more than sixty Agreement Templates, their annotation and configured them using X-Author. Created standard clauses and clause libraries to support various templates. Configured templates, using conditional segmenting, dynamic document assembly rules, smart clauses and smart fields.
- Worked on e-Signature functionality for Templates, inserted Docusign tags for all Agreement Templates.
- Created Supporting documents related to Terminations and approval notifications.
- Worked on Agreement Terminations and designed processes that would kick off tasks and actions prior to Termination of Agreement with the Supplier.
- Supported legacy contract migration from ECMS to Apttus. Worked on metadata management and OCRed files for content search in Apttus.
- Supported UAT and SIT for all SRM and CLM scenarios.

Project 18: Apttus CPQ/CLM
Client: BOX , Redwood City, CA   **April 2018 to May 2018**
Role: Apttus CPQ Consultant

Worked on global Quote To Cash process for a Subscription based Business model(SAAS) using Salesforce CRM and Apttus CPQ applications to support Sales, Legal, Finance and Operations.

- Facilitated workshops/Class Room Pilots (CRPs) with business users to capture requirements and present solution details.
- Documented all current processes flows, reviewed the same with business. Defined future state process models using Apttus. Created detailed visio flow diagrams and process flows.
- Captured requirements to support both Direct & Channel business models to support all subscription sales in all sales territories.
- Collaborated with business stakeholders to execute the CPQ roadmap and the Quoting processes, including ongoing support for enhancements and business rule updates within the Apttus CPQ tool. This included, product configuration, pricing rules/execution, approval workflow design, and document template administration.
- Worked on Price List requirements for all Enterprise and Business Plus packages for all sell through processes and currencies.
- Worked on legacy data to understand and analyze channel pricing and discounting rules. Defined constraint rules for inclusion, exclusion & replacement of products and zones based on Territories and Zones.
- Configured 33 Price Lists in seven currencies to support global business activities. Used Price list item attribute criteria for bundles/wrappers and configured Price Matrices for some price list items. Attribute (when criteria was defined) was used to derive price. Also, created multiple dimensions for few items.
- Worked on Tiered pricing for enterprise based subscription products for each of the sales territories. Created dimensions (Usage, Number of Users, API Calls & registration) and Price matrix entries to support tiered pricing.
- Worked on proposal templates related to Partner/channel sales.
- Worked on Data loader and Reports functionality to migrate Price Lists and validate Price List Details.
- Worked in Agile environment and used JIRA& Confluence (Apttus Managed) to track requirements, development activities, Test Cases and defect Management. Worked with Apttus and Accenture teams.
- Worked with Offshore development and Accenture testing teams; supported UAT.

Project 17: Apttus CPQ/CLM & Legacy Contract Data Migration Strategy Project
Client: Apttus/JDA Software Phoenix, AZ   **Jan 2018 to April /2018**
Role: Sr Business Analyst

Worked on CPQ / CLM Strategy and Plan to design and document the CPQ/CLM operational blueprint to support the Quote To Cash initiative; Assess the readiness of data and prepare a data migration plan for legacy contracts; Prepare an actionable and realistic roadmap that adheres to CPQ & CLM processes, organization, and technology to achieve program goals.

- Facilitated workshops with business users belonging to all lines of business in all GEOs to define to be processes for Quoting & Contract Management.
- Documented all existing processes flows, reviewed the same with business. Discussed the pain points and inefficiencies in the existing processes. Suggested solutions and work around to improve process outcomes.
- Worked on future state CPQ/CLM maturity model per Apttus methodology. Rationalized unique processes, defines L1 and L2 processes flow for each line of business.
- Worked on Legacy contracts, reviewed them for required metadata and agreement types, and to assess the readiness of legacy contracts and prepare a data migration plan to migrate historical contracts to new CLM repository.
- Worked with the LOBs to define and standardize Agreement Types and the required Templates for use in the new Apttus CLM Tool.
- Worked on Standardizing clauses across all lines of business and GEOs for creating clause templates.
- Worked on data governance plan, account hierarchies and contract relationships.
- Trained users on extraction process required for metadata collection and OCR conversion.
- Prepared Roadmap document for CPQ/CLM implementation using best practices.
- Worked on 'Decision Rights' approvals processes, documented the approval matrix required for Quote / Proposal and Contracts variance.
- Worked on Proof of Concept to demonstrate the future state model with desired approvals including self-service and guided selling models.

Project 16: Apttus Contract Lifecycle Management & Emptoris Contract Data Migration
Client: Health care Service Company (BCBS) / IBM Chicago, IL   **Jan 2017 to Jan 2018**
Role: Sr Business Analyst

Worked as a Senior Business Analysts to support Contract Lifecycle Management initiative for IBM on Salesforce platform. My responsibilities included requirements gathering, creating current and to be process flows, application Design, Development & Configuration, testing and supporting Business Readiness.
- Worked on APTTUS end to end CLM process to create new contracts and monitor them. Process supported third party paper for contracts and eSignature.
- Created page layouts for each record type based on legal units supporting them.
- Worked on template rules and document output based on teams requesting the contract.
- Worked on self-service contracts functionality, created auto generation of contracts, which were low risk, and high volume contracts with no legal involvement based on input questionnaire.
- Worked on Approval matrix based on Legal and Finance defined criteria for approval of terms and internal signature policy.
- Created and managed templates using X-Author for all Agreement Types, used dynamic document functionality to generated template based on predefined Agreement types, Region and Category. There were twelve templates for five record types.
- Created Clause library for the entire contract terms, around two hundred seventy to support all Agreement types and variations.
- Configured Apttus per requirements, feedback and scope. Created traceability matrix for all requirements.
- Worked on migration of Emptoris contract migration to new Apttus repository. Worked with the business users and Legal tem to identify the required metadata to be able to use in the new CLM system.
- Supported conversion of Emptoris PDF files into OCR formatted searchable files using Kira. Translated the conversion results to user-friendly reports for the benefit of the users for

evaluating/mapping Accounts and other metadata terms. Conversion process included more than two hundred thousand contracts and related files.

- Mapped extracted terms to new Apttus terminology for seamless reporting with monitoring functions. Supported creation of relationships between the related contracts and affiliate accounts.
- Worked on DocuSign integration with Contract signature process, CLM also supported wet signature process.
- Created alerts and notifications for the legal, credit and revenue recognition teams for each stage of contract transition. Automated email notifications for active contracts for renewals and expiry.
- Worked on detailed reporting that included clause level reporting.
- Created business impact and dependencies for each of the following CLM activities: Requesting, Submitting an agreement, Drafting, negotiating, Approval, Sign, store and monitoring of contract.
- Supported creation of training materials, trained users, supported UAT and initial deployment and business readiness.

Project 15:   **Oracle / Siebel 8.2 Public Sector/ Call center/ Policy Automation / OUI**
Client: **Cover Oregon (HIX)/Oracle, Portland, OR.**   **10/2015 to 12/2016**
Role: **Sr Siebel Consultant - PM / Business Analyst Healthcare.**

Worked as a Lead Business Analyst through Oracle for the Oregon State Health Exchange market place– Cover Oregon. My day-to-day activities included cross functional efforts such as requirements gathering, process flows using MS visio, system analysis/design, development/configuration, testing and implementation of enhancements and new SHOP (Small Business Health Options Program) functionality. Joined existing team of analysts to refine and rewrite requirements.
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Project 14:   **Oracle R12 / Salesforce - Apttus –CPQ/CLM / Emptoris 7.x – 9.x/Siebel 8**
Client: **Netapp/PriceWaterhouseCoopers - WW,Sunnyvale, CA.**   **5/2010 to 10/2015**
Role: **Architect /Lead Business Analyst**

- Worked as a Process Architect on a large scale, global, 'Quote to Cash' Oracle Business Transformational project. Developed integrated data and process models for Configure Price Quote and Contracts Module (CPQ/CLM)
- Responsible for gathering key detailed requirements from various stakeholders; prioritized requirements to ensure development efforts are aligned with the goals and objectives of the business.
- Worked on Contract business process optimization services to user groups, Facilitated business information gathering sessions, conducted research, make presentations, and documented the findings and analysis.
- Coordinated with *SME*s, Developers and testing resources; assisting with user acceptance use case creation and testing, and created project documentation and user training. Additionally, provided ongoing analytical support to validate data integration and system functionality and drive enhancements into process, tools and systems.
- Worked on Apttus CLM module integrated in SFDC to support Customer and Partner Quote transactions.
- Worked and supported in creating a custom Sales/Pricing Contracts database in Apttus. Guided functional and Technical teams on user friendly Screens and application functionality. Helped develop alternate design solutions to complex and conflicting solution options.
- Analyzed the historical Customer / Partner Contractual information and created Business rules for Contract record creation and execution to support Quote Transactions and Order management.
- Defined the rules for application of Contract Terms to a Company and it affiliates based on Netapp Account Hierarchies and Oracle TCA model based on selling relationships.
- Worked on Emptoris Contract Management Tool to capture Revenue, Non Revenue and Clickthru contracts based on predefined/custom templates for Direct and Indirect contract generation.
- Worked on Notifications/workflow, metadata management and user controls including approval matrix based on predefined legal policy in Apttus.
- Worked with Sales Ops/Marketing and Treasury teams on Price lists, currencies and INCO Terms.

- Worked with Order & Invoicing teams on Watch list items, exclusive OM contractual terms and Payment terms variations.
- Worked with Sales Agents on Tiered pricing and discounting models for pending Quote transactions.
- Designed and managed Contract Templates using X-Author; Created new Contract Templates and Clause Templates for all lines of Business.
- Used Dynamic Clause functionality to generate contracts based on Contract Sub Category, Region and Language.
- Developed a process to uniquely identify the legal entities for applying Contractual Terms, Pricing & Discounts.
- Worked closely with Partner Operations team and defined closed loop sync process between Legal and Partner Ops teams so their Activation/Inactivation was uniform across the Contracts and PRM systems.
- Worked with Master Data Management Team to enrich the Customer Profile based on Contract Information. Worked as Point of Contact for all Customer / Partner data issues for Major accounts.
- Worked on Master Data Management that included data architecture, data integration and data cleansing. Integration with D&B and Oracle Data Quality modules.
- Defined business rules to restrict data visibility based on UMX roles & Responsibilities.
- Defined structured Contract Queries for users that were commonly used.
- Worked on defaulting rules for Quote transactions based on Contract terms.
- Assisted in creating Test Scenarios, test scripts and test environment (users & Data).
- Created and maintained User Manuals and other training documents. Worked closely with Accenture *Application Readiness* and *Business Readiness* Teams. Supported course curriculum defined by Netapp University.
- Assisted in implementing and analyzing impacts of financial and risk management information technology programmatic changes for Sales Contracts. Helped retire watch list and improved finance audit cycle time.
- Worked on successful engagement of Sales Ops, Partner Ops, Finance and Regional Legal teams to drive contractual term resolution.
- Worked on Customer / Partner Contractual Pricing and Discounting to be loaded into Advanced pricing Module of Oracle based on Account Hierarchies and Volume Discounts & Program Discounts.
- Worked in a leadership role in ensuring high quality and standards that were implemented and followed for the Customer/Partner data collection and data integration with Sales Contracts Module.
- Tracked and reported project status on a weekly basis to the PMO and stakeholders;
- Supported the custom application for all issues, defects and enhancements as a single point of contact. Worked closely with developers, functional analysts, Application & Business Readiness teams for all Sales Contracts activities.
- Created, developed and implemented a *Staging Database* for collecting all the contractual terms extracted from the Sales Agreements for transactional usage using *MS Access*. Database was fully functional, standalone, shared and multi user application.
- Worked on data migration from MS Access to Oracle Application. Completed data validation and smoke tests.
- Worked closely with PWC, Accenture and Oracle Teams both onsite and offshore.
- Exposure to Revenue & Non revenue contract agreements including confidential contracts.
- Involved in extraction of Contract Terms from the Multi Million Dollar agreements. Reviewed the ambiguous INCO Terms, Contingencies and Payment terms with Legal and Audit Teams.

Service Now program Manager
- Worked in a leadership role to manage new enhancements using Service Now in the Q2IO division to support SSRs and Sales Teams
- Developed detailed support process and related requirements, streamlined the Service Now Business Analysis and Development work.
- Simplified SSR task assignment and follow-up processes based on SLA's.
- Supervised UAT and Deployment activities.

Project 13:   Marketing, Sales, PRM & Call Center

Client: **Hewlett Packard - WW, Folsom, CA.   8/2008 to 5/2010**
Role: **Consultant-PM/Lead Business Analyst.**

- Worked for WW Partner Sales Support Partner Data Acquisition and Reporting team to manage the global standards for accurate and timely delivery of data provided by our channel partners and other HP business sources to support Partner, Sales Compensation, Supply Chain and other Business Planning and Reporting (BPR) activities using Siebel ebusiness solutions.
- Responsible for managing key global projects and programs within the WW Partner Sales Support Data Acquisition and Reporting Operations functions through key regional cross-domain initiatives and process coordination.

Project 12: Email Automation SSSE, Marketing, Sales, efinance
Client: IBM/ Arcapita Bank, Atlanta/Bahrain /London.   **9/12/2007 till 4/30/ 2008**
RoleConsultant-PM/Lead Business Analyst.

- Worked with a leading Systems Integrator as a Sr.Business Analyst to demonstrate, gather requirements, design and deploy Siebel CRM & Siebel Outlook Synchronization module SSSE. Configured the Siebel and Outlook user clients for bidirectional Business Contact Synchronization, linking Contact with Accounts and Opportunities/Deals from within Outlook Client.

Project 11:   **Siebel + Salesforce CRM Service/ Sales/ Call Center / Email Response**
Client: **DELL/ Everdream Corp, Fremont, Ca.   8/15/2006 to 10/31/07**
Role: **CRM Consultant-Project Manager / Business Analyst.**

- Worked as a Business Analyst to gather requirements for Email Response from the User groups. Organized Interview sessions and solution demos to the user base. Completed functional design activities, Developing and testing detailed functional designs for business solution components besides assisting in application build, test, and deployment activities. Worked on the Gap analysis based on the existing Siebel configuration.

Project 10:   **Siebel 7.7/7. SSSE/ Sales / Service / Marketing / ecommunications /PRM)**
Client: AT&T/Cingular Wireless, Bothell, WA. (Telco)   8/24/2005 to   7/31/06
Role: **Project Manager-Business Analysis.**

- Worked in a leadership role on managing Business Analysts to gather requirements from the Business User groups. Organized JAD sessions and Applications demos to the user base. Supervising process and functional design activities, Creating functional requirements as an input to application design Developing and testing detailed functional designs for business solution components besides assisting in application build, test, and deployment activities. Worked on the Gap analysis based on the existing Siebel configuration.

Project 9:   **Siebel 7.5/7.7 Global PRM Implementation. (PRM/Sales /Marketing)**
Client: **Hewlett Packard, Cupertino, Ca.**   **2/13/2003 to 10/31/05**
Role: **WW Lead Business Analyst/Project Manager.**

- Worked in a leadership role on a Multi lingual Global deployment of Siebel 7.5/7.7 e-channel application called Partner Pro. Was responsible for defining, consolidating, validating, and documenting and publishing business requirements across all regions. Project lasted for almost three years. It was implemented in four phases across the world.

Configuration Control Board (CCB)
- Founded the configuration Control Board to gather all the business requirements from the user groups in all the regions. The board constituted all regional businesses and IT design centers.

Data Quality

- Worked on Address standardization and validation in Partner Pro. Address was in most cases a cause for duplicate data. There were millions of Contacts and Partners that were migrated from legacy systems into Partner Pro.
- Evaluated applications like QAS, Siebel and First Logic for improving the data quality.
- Used First Logic and Trillium for US and EMEA regions respectively so as to handle US and non-US addresses.

CRM PRM Alignment
- Worked on a major integration between CRM Siebel 7.5/7.7, the customer master and Partner Pro, the Partner master. This integration was very critical for HP as they wanted to address the leads generated by the Call Centers (CC).
- Defined the data transfer schedule between the systems across all the regions. It was batch load on daily basis.

Project 8:   Migration from Clarify to Siebel 7.0.3 Oracle 8i, 7.3, Actuate 5.
Client: Digex, Beltsville, Maryland. (Telco)   4/09/2001 to   12/20/02
Role: Technical Lead consultant / Business Analyst.

- Worked in a leadership role, managing resources, assigning tasks, monitoring progress and setting milestones. Was responsible for defining, developing, executing, and managing a strategic information system plan that was in sync with the business objectives.
- Develop, implement and optimize the operating environment to best achieve business results, including data, hardware and software. Introduction of the service request number helped process the call to be routed to the agent handling the case rather quickly rather than following the ACD routing tree. Queue management and workload analysis and distribution using Assignment manager helped optimize the agent workloads and also monitor them effectively.

Project 7:   Implementation of Siebel 2000 Call center, Scopus enhancements.
Client: Sun Microsystems, Bloomfield, Co. 10/23/2000 to 3/23/2001
Environment: Siebel 2000, Scopus 3.6 (Java client), Oracle 7.3, Sun Solaris, TCL/TK.
Role: Technical consultant / Business Analyst (independent) Accenture Project.

- Worked on **Scopus java** client (Scopus version 5.3). Modified the state model to incorporate the new status changes. Modified the procedures that were executed by State Model.
- Worked on the GAP analysis for the migration from Scopus to Siebel applications.
- Worked on data requirements and documented what data was available in existing systems and determined the data required to business requirements.

Project 6: Implementation of Siebel 99, Scopus enhancements & Migration to
            Siebel.
Client: Ford Motor Co, Dearborn, MI.   7/6/99 to 10/12/2000
Role: Project Manager/ Data Architect /Business Analyst
Employer: PricewaterouseCoopers.

- Worked in a leadership role involving design, development, migration (from **Scopus** to **siebel**) implementation and support of **Siebel call center, SFA**, **Support & Finance** module enhancements on an oracle database for the Ford National Employees Credit Service Center.
- Responsible for the project layout and resource planning and application development milestones.
- Involved in Gathering Business Requirements, Translation of Business Requirements into system requirements. Worked as a liaison between end users and technical team.
- Worked on call center diagnostics. Creating customized reports as per the requirements of the various layers of the management. Reports pertaining to call volume, calls per day per CSR, calls touched by csr/agent, call duration, average time to resolve, average time for the group and the center. The reports would be for the spans of Day/month/Year. Used **assignment manager** rules to determine the incentives for qualified agents and to distribute the workload among the queues. The criteria rules were applicable to Service requests, Contacts and Activities (NOR/defects). Evaluation was done on the basis of position, Team/Queue and Agent.

Project 5: Scopus (Siebel) development and maintenance. Oracle 7.3, TCL
Employer: MCI WorldCom (Telco)
Role: Technical Consultant/ Business Analyst (12/07/98 to 6/30/1999)
Client : Cadence Design Systems, San Jose, CA

- **Scopus** Development and Customization of Scopus Support Team ver 5.3.
- Responsibilities include application problem resolution, programming and unit & system testing.
- Worked on new Inform Team (work flow) business rules for Cases and Tasks. Rules to notify the select few audience by page and email whenever a critical case/task is updated.
- Worked on implementation of Quality Team.
- Worked on the interfaces for **SAP** and Email. Creation of cases through email interface and acknowledging them.

Project 4 : Scopus CRM Implementation and Y2K Compliance.
Employer: Scopus
Role: Developer/Analyst   (10/12/98 to 12/04/98)
Client : WorldSpan Inc, Atlanta, GA
- Lead a **Scopus** team of three people for development and up gradation.
- Pruning the existing code and removing the redundant code.
- Modifying the existing **Scopus** Process to incorporate the new Business changes.

Project 3: Scopus CRM Implementation
Employer: Scopus
Role: Developer/Analyst   (4/98 to 10/9/98)
Client : Autodesk, San Rafael, CA
- Worked on Oracle procedures and Triggers for generation of cases tickets from the Web.
- **Scopus** Development, streamlining code and Customization (Support Team).
- **Scopus** help desk operations. Resolve Autodesk **Scopus** user technical issues by providing the hotline customer support. Translate the unresolved problems into Scopus bugs/defects, under the supervision of the Project Manager and fix them.

Project 2: Scopus CRM Implementation
Employer: Scopus
Role : Developer/Analyst   (11/1997- 4/1998)
Client : WorldCom, Tulsa, OK

- Developed software using Oracle 7.3 and **Scopus** Applications for generation of Case Tickets for inputs received from the Web.
- Worked on the TCL and Oracle SQL for formatting, validating and checking data for completeness before generating the ticket.

Project 1: Scopus CRM Implementation
Employer: Scopus
Role: Developer/Analyst,   (10/97-11/97)
Meta Creations, Santa Barbara, CA
- Data migration into the **Scopus** Tables using SQL* LOADER.
- Generation of Case Tickets using Scopus Support Team and Oracle 7.3.

Executive   (01/95-06/97)
Larsen & Toubro Limited, (Projects Division), India

Oracle Financials
- Written interfaces for integrating old data into present accounting format and loading it into Oracle Financial' s interface tables using SQL*LOADER and PL/SQL. Cleaned up and dressed the data for consistency and redundancy.
- Involved in creating custom reports, forms and integration with A/P and A/R. Worked in maintaining existing forms 2.3 code for A/P and A/R.

- Participated in financial application software development; coordinated development of software interface between financial applications and, production and projects.
- Provide direction to program and project managers on critical contracting issues and foreign trade regulations.

Executive (7/90-12/94)
(Lloyds Steel Industries Ltd, Nagpur, India.)
Marshall 5.0

- Developed Vendor database which effective evaluation and assessment of the vendor ratings based on inputs from Inventory module.
- Created an application for automatic release of PO's and also recorded with controls the values of the amounts of PO's released for corresponding users.
- Developed the logical design of an online integrated PO system that would allow the company to integrate the purchase activities and maintain Vendor and Request For Quotation details.
- Estimated the costs factors of different levels within department and among departments as an ongoing process.