SFDC- BA Consultant

**Salesforce Certified Administrator**

**CSM Certified**

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**SUMMARY:**

* Over 13 + years of Extensive and Progressive Professional IT experience as Seasoned SFDC- Business System Analyst with expertise and skills in Client Engagement, Requirements Gathering and Elicitation and business process improvement.
* Techno-Functional experience with Salesforce Sales cloud system administrator and guiding clients on CRM solution for sales, marketing and services teams.
* Experience with custom workflow, notifications, approval processes, and Lightning Process Builder.
* Experience in creating lightning Homepage for different personas and Create list views by using Lightning Experience’s intuitive filters pane.
* Experience in FPX CPQ with Salesforce .How to create get quote and configure products on FPX
* Configured Products, Catalog, Catalog Hierarchies, Bundles, Bundle with Bundle, Price list across all products.
* Involved in end to end UAT testing and validation of CPQ including products ,pricing ,quotes etc.
* Experience in inline editing to make quick changes to records in a list view .
* **Trained on IQVIA CRM** . The Orchestrated Customer Engagement (OCE) suite from Iqvia connects Sales, marketing, medical and other functions.
* Worked with Data loader for loading the attachments into salesforce.com, related to objects like Accounts, Contacts, Opportunities, and Activities.
* Proficiency in SFDC Administrative tasks like Creating Profiles, Roles, Users, Page Layouts, Email Services, Validation rules, Approvals, Workflows, Reports, Dashboards, Tasks and actions.
* Extensive experience in Business Analysis, System Analysis, Requirements Gathering, GAP Analysis and Impact analysis
* Expertise in writing BRD, Functional Specification Document (FSD), Non-Functional Specification Document, System Design Specification, Use Cases, and training manuals
* Strong Expertise in resolving business as well as technical issues and served as the liaison between clients and technical developers and designers
* Strong knowledge in Salesforce CRM tool
* Extensive experience with analyzing business processes and documenting them using MS Visio, MS PowerPoint, MS Project
* Good Knowledge of evaluating Technical and Business needs, analyzing them and providing technical solutions, training and support for the teams in customizing and implementing the products
* Coordinated with QA team to develop Test Plans and Test Cases
* Interacting with stakeholders, analyzing the root cause of the problems, gathering requirements, rating and assigning priorities to requirements
* Working with the Project Manager to develop and assess options to solve the problem
* Elicitation techniques such as interviews, questionnaires, brainstorming sessions, focus groups, workshops, cost/benefit analysis and risk analysis
* Extensive knowledge of SDLC through all the four phases including Inception, Elaboration, Construction, Transition, and employing Agile and waterfall software methodologies
* Experience in analyzing Business and Technical specifications, developing Use-Case diagrams, Activity Diagrams, Class Diagrams, Data Modeling, Data Mapping
* Work-flow Diagrams to test requirements and procedures and formulate robust Business Model using Unified Modeling Language (UML) Techniques and Visio
* Experience in Project Management, Customer Relationship Management (CRM)
* Strong analytical, problem-solving and communication skills, with particular emphasis on clear, detailed Business Requirements and Functional Specifications, including status reports
* Continuous learning aptitude to constantly upgrade myself with new skills with a short learning curve and meticulous attention to detail
* Dedicated and conscientious work ethic, able to work independently or as participating member in a team environment
* Has been awarded for best performance and highly recognized individual in the project team

**EDUCATION:**

* **Bachelor of Engineering – Electronics Technology, Jul 2002 – Aug 2006**  
  Dr.DY Patil Engineering & Technology, Pune University,  
  Pune, India.

**TECHNICAL AND DOCUMENTATION SKILLS:**

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| --- | --- |
| Customer Relationship Management(CRM) | Salesforce, Salesforce CPQ,FPX CPQ, Apttus CLM/CPQ |
| Methodologies | Waterfall, Agile - Scrum |
| Business Intelligence Tools | SAP Business Objects 4.0,XI 3.1/XI R2/ (Designer, Infoview, CMC, CCM, Desktop Intelligence, Web Intelligence, Crystal Reports, Designer, Import Wizard, Publishing Wizard, Translation Manager, Report Conversion Tool, BI Launchpad, Dashboard Reports in B04.0 IBM ,Cognos 10.2.x |
| ETL Tools | SSIS ,Informatica |
| Databases | MS SQL Server |
| Query Tools | Apex Data Loader, dataloader.io |
| Project Management Tools | MS Project, MS Visio |
| Documentation Skills | Project Proposals, Request for Proposals (RFPs), User Manuals, Training Manuals |
| Office Skills | MS Word, PowerPoint |
| Business/Domain | Oil & Gas ,Banking, Insurance &Healthcare |
| Testing Tools | HP Quality Center. |
| Operating Systems | MS Windows 95/98/NT/2000/XP |

**EXPERIENCE:**

**SFDC Business System Analyst- PG & E – San Ramon, CA**

**Mar 2020 till date.**

**NMEC Project:-**

To create workflow process in Salesforce for Normalized Metered Energy Consumption program. This NMEC process measures savings and rewards payments to their customer. The scope of the project was to

* Allow for smoother, more accurate and less manual compliance reporting
* Improve data quality and enable better forecasting for meter-based projects
* Allow to optimize project processing for all meter-based programs
* Logical, compliant and intuitive system for managing meter-based projects and programs throughout their lifecycle
* Worked closely with the **Project Manager** and **Salesforce Architects** to bring the best use cases for **development and deployments.**
* Gather requirements from various Business Stakeholders using the standard requirement gathering techniques; meetings, Joint Application Design (JAD) session, questionnaires, interface analysts, document analysis, prototyping.
* Document Requirement Artifacts, Business Requirements Document, Use Case Specifications, Functional Requirements Specifications, Traceability Matrix,Data Dictionary .
* Performing Gap Analysis by comparing the current business processes with future business processes.
* Designed **Profiles, Roles** based on Organization role hierarchy and implemented Record-Level and Field-Level security and configured their sharing settings
* Conduct manual testing and facilitate User Acceptance testing (UAT) with business users.
* Support and training new end users and business users of the salesforce.com application.
* Created different Reports and Report Folders to assist managers to better utilize Salesforce as a sales tool and configured different Reports for different user profiles based on the organization’s requirement.

**May 2020 – Till date**

**CARE-FERA Migration Project: -**

To migrate Care one and MDSS database to energy insight, a salesforce cloud-based application. This application will allow customer to enroll from Salesforce portal website and allow them to view their enrollment status.

* Analyze business processes; identify areas of improvement, recommend solutions.
* Gather requirements from various Business Stakeholders using the standard requirement gathering techniques; meetings, Joint Application Design (JAD) session, questionnaires, interface analysts, document analysis, prototyping.
* Document Requirement Artifacts, Business Requirements Document, Use Case Specifications, Functional Requirements Specifications, Traceability Matrix.
* Performing Gap Analysis by comparing the current business processes with future business processes.
* Create Mockup screens from web pages for the design of force.com pages.
* Design Unified Modeling Language (UML) diagrams; Use Case, Activity, Sequence diagrams detailing business processes.
* Work with the Stakeholders and IT team members to design and implement the solution meets the business expectations.
* Created or update Workflows, Assignment Rules, Approval processes, Reports, Dashboards, and Profiles as needed to implement the business requirement.
* Created new custom objects, assigned fields, designed page layouts, custom tabs, components, custom reports.
* Implemented pick lists, dependent pick lists, lookups, master detail relationships, validation and formula fields to the custom objects.
* Cleanse and load data into Salesforce application using Data Import wizard and Data Loader.
* Communicate Business/User requirements to technical teams.
* Create Test Plans and Test Strategies, Perform System Integration Testing.
* Create and Manage Defects from Origination to Closure.
* Conduct manual testing and facilitate User Acceptance testing (UAT) with business users.

Assist in Go-live Production deployments, validation and launch activities. Assist in post Go-live support activities

**July 2020 – Till Date**

**Community Solar Green Tariff (CS-GT) program Project :-**

The scope of the project is to allow customers to apply to subscribe to a LGS solar project, check eligibility of the applying customers, enroll applying customers that are eligible, provide the monthly bill discount, unenroll customers when needed, and provide necessary reporting details.

* Analyze business processes; identify areas of improvement, recommend solutions.
* Gather requirements from various Business Stakeholders using the standard requirement gathering techniques; meetings, Joint Application Design (JAD) session, questionnaires, interface analysts, document analysis, prototyping.
* Created new custom objects, assigned fields, designed page layouts, custom tabs, components, custom reports
* Document Requirement Artifacts, Business Requirements Document, Use Case Specifications, Functional Requirements Specifications, Traceability Matrix
* Involved in the Integration with various systems for Customer Care and Billing
* Communicate Business/User requirements to technical teams.
* Create Test Plans and Test Strategies, Perform System Integration Testing.
* Create and Manage Defects from Origination to Closure.
* Conduct manual testing and facilitate User Acceptance testing (UAT) with business users.

**SFDC Business System Analyst- Chevron Manufacturing – San Ramon, CA**

**Mar 2019 till Mar 2020**

To Develop a one-stop-shop Digital Engineering Workflow Integration Tool to manage, track, and communicate during all phases of engineering, from proposal through implementation customers.

* **How stakeholders can adopt the new tool so that it can create value to the organization.**
* **Improvise the Business processes and create a valuable salesforce product using out of the box functionality.**
* Analyze business processes; identify areas of improvement, recommend solutions.
* Gather requirements from various Business Stakeholders using the standard requirement gathering techniques; meetings, Joint Application Design (JAD) session, questionnaires, interface analysts, document analysis, prototyping.
* Document Requirement Artifacts, Business Requirements Document, Use Case Specifications, Functional Requirements Specifications, Traceability Matrix.
* Performing Gap Analysis by comparing the current business processes with future business processes.
* Design Unified Modeling Language (UML) diagrams; Use Case, Activity, Sequence diagrams detailing business processes.
* Work with the Stakeholders and IT team members to design and implement the solution meets the business expectations.
* Created or update Workflows, Assignment Rules, Approval processes, Reports, Dashboards, and Profiles as needed to implement the business requirement.
* Created new custom objects, assigned fields, designed page layouts, custom tabs, components, custom reports.
* Implemented pick lists, dependent pick lists, lookups, master detail relationships, validation and formula fields to the custom objects.
* Cleanse and load data into Salesforce application using Data Import wizard and Data Loader.
* Communicate Business/User requirements to technical teams.
* Create Test Plans and Test Strategies, Perform System Integration Testing.
* Create and Manage Defects from Origination to Closure.
* Conduct manual testing and facilitate User Acceptance testing (UAT) with business users.
* Assist in Go-live Production deployments, validation and launch activities. Assist in post Go-live support activities.

**SFDC Business System Analyst –Moody’s Analytics – New York**

**Jan 2017-Feb 2019**

* Manage all aspects of reporting for the corporate CRM (Salesforce) system. Part of the core design team to model and Conduct manual testing and facilitate User Acceptance testing (UAT) with business users.

Assist in Go-live Production deployments, validation and launch activities. Assist in post Go-live support activities dimensionalize sales data from the transactional CRM system. Implementation of a new corporate customer data warehouse (SQL Server) and a business intelligence platform (Cognos) that is robust and easily consumable from various lines of business.

* **How to empower Moody’s sales team so that it can predict greater insights using descriptive and predictive analytics by using this Salesforce BI application**
* **How can this application enhance opportunities for the Sales team**
* Strong experience with Scrum methodology and well versed in writing user stories.
* Excellent understanding of Business Requirements Gathering, Translating Requirements into Specifications and Application Design.
* Proficient in Technical and Business writing, Business Process Flow, Business Process Modeling and Testing.
* Creation of Test Strategy and Test Plan, preparations of project estimations.
* Work experience of preparation of Manual Test Cases, execution of test Cases.
* Proficient in using Agile Scrum methodologies, using tools like Jira ,Rally ,performed roles of Scrum Master following sprint/standup sessions and used Excel extensively to write user stories, analyzed the Iteration Burn Down charts and reviewed defects in Rally
* Extensive experience in creating Screen Mockups and Wireframes, conducting GAP Analysis and Impact Analysis.
* Experience in SFDC Validation Rules, Work Flows, Sales Order Approval Processes, field updates, Email generation .
* Negotiated agreements and commitments by facilitating communication between cross functional business unit(s)
* Involved in end to end testing of FPX with Salesforce for Moody’s Sales Analytics team
* Involved in Developing **Apttus Approval Process**and worked on **X-Author tool for Contracts.**
* Template Administration of X-Author contracts for contract lifecycle Management with Salesforce and MS word
* Have solid experience on database query tools such as TOAD, SQL Navigator, and SQL Assistant, SQL Developer.
* Expert in writing complex SQL queries for back-end testing.
* Experience in testing Cognos canned report 10.2 and Cubes.
* Conduct manual testing and facilitate User Acceptance testing (UAT) with business users.
* Assist in Go-live Production deployments, validation and launch activities. Assist in post Go-live support activities

**SFDC Business Systems Analyst – AMEX- New York**

**Jul 2014 – Jan 2017**

* **I was part of the digital product management team and the mission of the team was to enable marketing and sales teams interactions to derive revenue through acquisition, engagement and retention of our highest value customers.**
* **Salesforce application was a value add for our business which created capabilities to understand past 30 day spend by our customers ,increased new 450 accounts for our credit cards in 2 month.**
* Strong experience in all phases of Software Development Lifecycle (SDLC) using Waterfall, Agile/Scrum, RUP (Rational Unified Process) and Software Testing Life Cycle (STLC)
* Strong experience with Scrum methodology and well versed in writing user stories.
* Excellent understanding of Business Requirements Gathering, Translating Requirements into Specifications and Application Design
* Proficient in Technical and Business writing, Business Process Flow, Business Process Modeling and Testing.
* Highly proficient in writing User stories, creating Use Cases, Use case diagrams, Workflow Diagrams and MS Visio for UML
* Extensive experience in creating Screen Mockups and Wireframes, conducting GAP Analysis and Impact Analysis,
* Experience in preparing and documenting the User Acceptance test (UAT) plan and obtaining the necessary signoffs from the concerned business units
* Involved in Test Planning, Test Preparation, Test Execution and Issue Resolution and Report Generation to assure that all aspects of a Project are in Compliance with the Business Requirements
* Strong Experience in conducting Manual Testing, User Acceptance Testing (UAT) and documentation of Test Cases
* Focused troubleshooter and a team player with excellent interpersonal and communication skills. Ability to work cohesively with developers, other team members, and testers
* Used Rally tool to create backlog items, add tasks for the development and testing team, create user story for the requirements
* Presented a walkthrough session on the scope and design of the project to the business users.
* Created a proposed workflow and wireframe using VISIO for the solution provided
* Interacted with various teams within the project for integration of Informatica with Salesforce .
* Provided a design for modifications to the existing triggers in SFDC to filter only the partner accounts
* Conduct manual testing and facilitate User Acceptance testing (UAT) with business users.
* Assist in Go-live Production deployments, validation and launch activities. Assist in post Go-live support activities

**Project Lead – Group Health Insurance – Seattle**

**Role – Business System Analyst**

**Dec 2013 – June 2014**

* Responsible for writing BRD, Functional Specification Document (FSD), Non-Functional Specification Document, System Design Specification, Use Cases, and training manuals
* Responsible for resolving business as well as technical issues and served as the liaison between clients and technical developers and designers
* Proficient in using Agile Scrum methodologies, using tools like Rally ,performed roles of Scrum Master following sprint/standup sessions .
* Extensive experience in creating Screen Mockups and Wireframes, conducting GAP Analysis and Impact Analysis,
* I was responsible at GHC to identify the actual list of reports from the impacted list which are being used by GHC
* Create the document, based on the list identified in point 1 above, to list technical details like Database names, their connectivity, report paths and Business Objects .
* Analysis of 4350 reports in WebI for ICD9 to ICD10 code effect change.
* Remediate the identified reports and coordinated with the offshore team.
* Ensure deliverables are prepared to satisfy the project requirements.
* Deciding the risk factors and suitably eliminating them.

**Charles River Laboratories - US, Syntel**

**Role – Business System Analyst Feb 2013 to Nov 2013**

* Involved in requirement gathering from onsite coordinator
* Responsible for writing BRD, Functional Specification Document (FSD), Non-Functional Specification Document, System Design Specification, Use Cases, and training manuals
* Implementing data restriction on Web Intelligence report.
* Formatting of Web Intelligence report.
* Test the reports with the new SAP apps on Ipad via 3G.
* Analyze the known issue related to Ipad limitations.

**RBC DEXIA INVESTOR SERVICES, Syntel, SLCR RBC CANADA | Business System Analyst | April’ 2012 to Jan’2013**

* Involved in requirement gathering from onsite coordinator.
* Responsible for writing BRD, Functional Specification Document (FSD), Non-Functional Specification Document, System Design Specification, Use Cases, and training manuals
* I was involved in setting up the environment in BO CMC for various tasks as follows:-
  + User Profile Set-Up B) Creating Shared and My Folders
  + Setting System Events for Alerts in BO CMC for Scheduling of the Reports.
  + Creating various access Level according to the Business Requirement.
  + Development of WEBI Report based on Audit Universe.

**Tower Group of Companies - US, Syntel, CL EDW Implementation | Business System Analyst | Nov’ 2011 to April’2012**

**Allstate Insurance- US, Syntel | Business System Analyst | July 2011 to Nov 2011**

**Allstate Insurance - US, Syntel, AFT- EDMS | Business System Analyst | Nov 2010 to June 2011**

**Allstate Insurance - US ,Syntel Pune, India | Business System Analyst | Jun 2010 to Nov 2010**

**SAMI (Syntel’s Analytical Model for Insurance) | Business System Analyst | May 2010 to June 2010**

**KPIT CUMMINS INFOSYSTEMS LTD, PUNE |Business System Analyst | JUNE 2007 – JAN 2010**

**SAMEEKSHA SOFTWARE, PUNE| Business System Analyst | DEC 2006- MAY 2007**

**CERTIFICATIONS:**

* Salesforce Certified Administrator Dec 2016
* CSM Certified May 2018

**ACHIEVEMENTS:**

* Awarded Best Performance Certificate by Syntel in May 2010
* Awarded Smart Award by Syntel in January 2013
* Awarded Appreciation Award by Syntel in August 2015
* Received appreciation mails from VP’s and Director’s of various Horizontal & Verticals of Syntel.
* Received client appreciation mails from Chevron Corporation, San Ramon. In Sep ‘2019
* Received appreciation mails from Account/Engagement Manager of Tech Mahindra in Sep 2019.