

# Amit Kumar Bal

Senior Salesforce/Vlocity Business Analyst

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# Summary

* **Certified Vlocity Consultant, Certified Vlocity Developer, Salesforce Admin Certified, Salesforce Advanced Admin, Salesforce App Builder Certified and Salesforce Community Cloud Certified.**
* Overall 6.4 years of Experience with 6.4 years’ experience in Salesforce and 1.4 year in Vlocity.
* Currently working on Salesforce **Vlocity projec**ts based on **HealthCare**.
* Responsible to find the best way to use the Vlocity platform and implement the requirement of Client.
* Responsible for undergoing Scrum meetings and Demonstration to clients, developing SFDC features and providing solutions based on the requirement.
* Initiated requirements refinement sessions to understand customers’ business, functional, and technical requirements.
* Responsible for Maintaining the Jira board(Creating Epics, User stories)
* Responsible for tracking and updating the stories via Jira Dashboard.
* Prepared functional and Business Requirement Documents (FRS, BRD) for business for salesforce sales, service, marketing cloud platform.
* Have experience on tools and application i.e. **Vlocity DX, Vlocity Platform Tools**, **ServiceNow**, **JIRA**, **Azure Devops**, Own Backup, Click Tools, Pardot, Email studio, Social studio, Advertising studio, Zendesk, Adobe E-sign, Smart Sheet, Calendar Anything, GoToMeeting.
* Experience in SFDC Configurations/Customizations. Have experience helping client with the Security model of salesforce and for the reporting/dashboard
* Recommend new features and limitations of salesforce and helping team to adapt it.
* Experience in SFDC Configurations/Customizations as Administrator, designing custom and junction objects, look-up and master-detail relationships, pick lists, custom fields, page layouts and custom tabs.
* Experience in creating, maintaining, and enhancing workflows, approval processes, formula fields, validation rules, field dependencies, automated alerts, and field updates according to application requirements
* Experience in creating, managing Applications, Custom Objects, Custom tabs, Fields, Relationships, Page Layouts, Record Types, Validation Rules, Email Templates, Report Types, Workflow Rules, Approval Process and Aware of the Governing Limits of Salesforce
* Knowledge of configuration and maintenance of security settings such as implementing organization Wide defaults, role hierarchies, criteria/ owner-based sharing rules, profiles and permissions, setting login hour, and IP ranges in compliance with organizational needs.
* Worked extensively on various Salesforce.com standard objects like Accounts, Contacts, Opportunities, Products, Cases, Leads and Campaigns.
* Worked on building Salesforce standard/custom report types, Reports and Dashboards, Report Folders across various objects for different business groups
* Has worked on Complete Org Migration from different Salesforce instances, which Includes complete metadata and Data Migration.
* Performed data analysis for data migration and Performed Data migration using Data Loader, Import/ Export Wizard, Mass Delete, SFDC Data Export, OWNBACKUP, Workbench, Ant Migration Tool
* Worked with Salesforce Process Builder and consolidated existing workflow rules with process builder.
* Strong experience in deploying Salesforce components across various sandbox and production instance using Change Sets, Ant Migration Tool. Experience in managing full sandbox, developer sandbox and Configuration-only sandbox.
* Used JIRA Agile for project management and bug tracking. Always willing to learn new skills to improve efficiency and increase knowledge base.
* Strong knowledge in Data cleaning and de-duplication of records not only through app exchange applications but through traditional methods like using excel as well.
* Experienced in AppExchange Application i.e., Apttus CLM, Apttus CPQ, Anaplan, Adobe E-Sign.

# Recent Professional Experience:

**Huron/ Emblem Health, Liberty Dental, Nasco (Current )**

**Sr. Salesforce/Vlocity Business Analyst**

* The project is based on Health Industry (provider, consumer, member portal)
* Responsible for Interacting with the client to get clarity on the requirement and groom them.
* Managed the Jira board to create epics, groomed stories.
* Responsible to **Connect with Developers** to help them understand the requirement and guide them in **development phase**.
* Responsible to analyse the stories and get back to client for any questions and prepare a solution for the story
* Connect internally with Vlocity architects to analyse the story and help them in the delivery methodology.
* For the complete team to be effective and agile, responsible for tracking the stories based on the stories received, groomed and waiting for grooming via an excel sheet and Jira.
* Connected via calls with the Client internally or via emails to ask questions regarding the stories where the story was not clear or else to guide them for framing a better user story.

**HCL/ TiVo Corporation**

**Salesforce Business Analyst**

* Working on Two different projects for the same client: Migration project (Salesforce)and Enhancement project (Vlocity)
* Was responsible for migration of the data and metadata from one salesforce org to their new org.
* Is responsible to prepare recommendation documents for their existing sales, service and marketing cloud platform and suggest them solutions.
* Understand the tools and applications used by business and recommend them for a better tool based on cost and functionality.
* Is responsible for Scrum meetings and Demonstration to clients, developed SFDC features, provides solutions, and guides the team with requirements.
* Participated in Requirements refinement sessions to understand customers’ business, functional, and technical requirements.
* Preparing functional and technical documents (FRS, TS).
* Analysis and working on the Implementation of the new requirement and enhancement requests.
* Worked on Production fixes with the team.
* Is responsible to coordinate with the Client and Internal teams during the production moves.
* Key Deliverables:
* Completed the Organisation Data Migration and Deployment of existing functionality using Any Migration tool to Production and currently working on the enhancements.
* Worked on Functional documents for business, based on the existing process which include sales, service and marketing.
* Worked on a Business requirement document to understand client pain points, concerns and additional requirements.
* Worked on various Recommendation and Solution Document, so that the existing business process can be automated and stabilized keeping in mind that the UI is easy to use for customers and the sales rep, also the cost to the business for using several tools can be optimized and preparing user story for each sprints

**HCL/ Teradata**

**Salesforce Administrator/Business Analyst**

* Was responsible for Scrum meetings and Demonstration to client developed SFDC features and provided solutions and guided the team with requirements.
* Participated in Requirements refinement sessions to understand customers’ business, functional, and technological requirements.
* Preparing functional and technical documents (FRS, TS).
* Analysis and working on the implementation of the new requirement and enhancement requests.
* Worked on Production fixes with the team and involved during the production data migrations and deployments.

**Key Deliverables:**

* Worked on designing custom and junction objects, look-up and master-detail relationships, pick lists, custom fields, page layouts and custom tabs.
* Worked on creating, maintaining and enhancing workflows, approval processes, formula fields, validation rules, field dependencies, automated alerts, and field updates according to application requirements
* Worked on managing Applications, Custom Objects and standard objects like Accounts, Contacts, Opportunities, Products, Cases, Leads and Campaigns, Custom tabs, Fields, Relationships, Page Layouts, Record Types, Validation Rules, Email Templates, Report Types, Workflow Rules, Approval Process and Aware of the Governing Limits of Salesforce
* Worked on configuration and maintenance of security settings such as implementing organization Wide defaults, role hierarchies, criteria/ owner-based sharing rules, profiles and permissions, setting login hour, and IP ranges in compliance with organizational needs.
* Worked on building Salesforce standard/custom report types, Reports and Dashboards, Report Folders across various objects for different business groups
* Worked on deploying Salesforce components across various sandbox and production instances using Change Sets. Experience in managing full sandbox, developer sandbox and Configuration-only sandbox

# Technical skills:

* Vlocity Console, Vlocity DX, OmniScript Designer and managed packages
* Salesforce Administrator
* Business Analysis (Requirement gathering, Interaction with client, Grooming stories)

# Education & Certifications:

* Bachelor of Engineering (B.TECH in Computer Science) from Biju Pattnaik University of Technology(2013)
* Vlocity Certified Platform Developer
* Vlocity Certified Platform Consultant
* Salesforce Certified Administrator
* Salesforce Certified Platform App Builder
* Salesforce Community Cloud consultant