APTTUS

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Summary
Thirty years of experience as 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 & Training and certification

Bachelor of Engineering (Hons) Electrical & Electronics, **BITS**), June 1990
Pilani, India (BITS is India's premier school of Engineering)
Siebel eBusiness applications at **Pricewaterhousecoopers**, PA
Clarify efront-office at Clarify Inc, MA
Scopus Applications at Scopus Technologies, California
Vignette Web Applications at Vignette, NY
Salesforce CRM and cloud computing
Apttus Quote To Cash (CPQ+CLM)

Technical Skills

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

CRM/PRM:
- **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.**
- **Salesforce Sales/Service Cloud.**
- **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.
- Access 2007

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

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

<u>Documentation</u> - 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

<u>Other Applications</u>:
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.

<u>Professional Experience</u>

Project 23: Apttus CLM , IBM Emptoris CLM Migration
Client: IBM/Apttus/VA **Oct 2019 to Date**
Role: Solution Architect

- Worked in a leadership role on Custom Contract Management System using Apttus to support Legal, Financial and Provider Services in Healthcare.
- Designed and developed Custom CLM process to Provider Care and Community Care Networks in 14 US States.
- Worked on Migration of legacy contracts (212 records & 330k attachments) from IBM Emptoris to Apttus.
- 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 , Minneapolis/Mn **Mar 2019 to Oct 2019**
Role: CPQ Consultant

- Worked on Global Quote To Cash (QTC) online subscription business process implementation for Content & Taxation products.
- 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
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.
- Met with user groups, defined project scope, requirements and dependencies.
- 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**
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: Sr Business Analyst

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.

- Worked on requirements related to online application process and business rules to determine individual/household ***Eligibility*** for advance payment of premium tax credits, Cost Share reduction or Medicaid (OHP/CHIP).
- Worked on Guided Eligibility Determination by an agent and Minimum Essential Coverage (MEC) for Medicaid Eligibility qualification.
- Worked on plan ***Enrollment*** for exchange eligible individual/households. Defined eligible plans based on user preferences, zip code, plan criteria for both Medical and Dental coverage.
- Worked on Change in circumstances (Life changing event), Plan Terminations and reconciliations with carriers and CMS.
- Created Use case business process flows using MS Visio to define the key activities defining the Eligibility and Enrollment processes based on business information, actors involved and organizational groups.
- Worked on Standard Benefits and Coverage.
- Worked on. Medicaid eligibility business rules. Cover Oregon was Operating the Oregon states MMIS.
- Worked on Oracle/Siebel OPA/ Case Management / IDM and UCM modules.
- Worked with interface teams for data inputs (XML/EDI)to carriers, CMS and internal systems. Worked on processes related to management of issues/errors arising out of interface

transactions.

- Worked on HIPAA compliance and user account management.(Remote identity proofing using Experian).
- Worked with the Identity Management (IDM – Oracle Identity Management) team to define/modify individual / agent / community partner securely access to the application.
- Worked on changes to Individual *Dashboard* to let the user initiate changes to coverage, submit change in circumstances, view messages and detailed profile.
- Worked on Siebel UCM to define the content for Public User and members based on eligibility conditions. Business rules were defined in the Knowledgebase to present the data access based on user role (Agent/CPA etc.).
- Worked on Master Data Management that included data architecture, data integration and data cleansing. Integration with D&B and Oracle Data Quality modules.
- Worked on Service Now for CPA enrollment and member management. Streamlined the CPA enrollment process including registration, license validation, training, member rating, communication methods and support tools. Supported the Volunteer member program to handle the Train the trainer activities.
- Worked on SHOP functionality business requirements.
- Worked on Data Quality processes for contact de duplication using Trillium.
- Managed Siebel metadata, Roles & Responsibilities and field mapping.
- 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 with User Readiness team to address Change Management issues. Worked on impact assessment for the business users, supported in creating training content and induction processes. Was part of the Change Control Board - CCB.
- Coordinated with *SME*s, Developers and testing resources; assisting with user acceptance use case creation and testing, and created project documentation and user training.

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: **Consultant - PM/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.
- Worked for successful engagement with Sales Compensation and Regional teams to drive data quality resolution, auditing and frequency increase with partners.
- Supported the Quality Re-engineering and re-design initiatives set forth by the Sales Compensation and other related work streams by coordinating and compiling analysis in various data related formats and utilized modeling tools to provide solution alternatives.
- Worked in a leadership role in ensuring high quality and standards that were implemented and followed for the data collection and data distribution of indirect data that feeds the Sales Compensation Downstream system(s) and processes.
- Responsible for applying developed subject matter knowledge to solve common and complex business issues related to the timely and accurate payment processes of HP's sales force within established guidelines and recommends appropriate alternatives.
- Help deploy Standard policies and ensure business requirements are fully enabled into global production.
- Worked with teams in Europe and North America.
- Worked on Marketing Campaigns using to target specific segments identified by the Sales Ops for WW and EMEA divisions to invite customers and prospects to the events promoted by the company.
- Worked on creating/managing contacts and prospects using list management for use in campaigns. Imported external list using list import utility.
- Used email-marketing campaigns to send out invitations to target segment invitees identified by Sales Ops.
- Worked on marketing programs for multi stage events management using Program Flow and tracked the responses through the life of the events from invitation to confirmation.
- Completed functional design activities, Developed detailed functional design documents, UAT, Test scripts, Entry & Exit Criteria and Cut over Plan for production migration.
- Mentored Project Manager's on use of methodology, suggested improvements, audited other Analyst project work.

Project 12: Email Automation SSSE, Marketing, Sales, efinance
Client: Arcapita Bank, Atlanta/Bahrain /London. 9/12/2007 till 4/30/ 2008
Role: Consultant-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.
- Worked on POC (Proof of Concept), conducted demo sessions and solution design options to the user groups.
- Configured the Siebel and Outlook user clients for bidirectional Business Contact Synchronization, linking Contact with Accounts and Opportunities/Deals from within Outlook Client.
- Worked on linking inbound and outbound emails to an Account, Contact and Opportunity from with in Outlook Client. This was unidirectional data flow. Outlook email was formatted and created as an Activity, linking an Account, Contact and an Opportunity.
- Worked on Marketing Programs, executed campaigns using outbound emails. Offered design to link the campaign responses emails to relevant Accounts / Contacts.
- Worked on Market segments to define appropriate customer base / prospects. Processed leads / opportunities based on the segments and associated them to respective Sales Groups.
- Used VB, xml and standard protocol to migrate email data from Siebel Server. Mapped data to a custom integration object. Process that was manually invoked by user intervention was executed by Siebel dispatch service and a workflow to create an activity in session less mode.
- Created business rules for User Data Synchronization. This was a global deployment that included users from US, Europe and Middle East.
- Worked on (Involved) CardScan and Blackberry synchronization with Outlook and subsequent contact data cleansing.
- Worked on Address Cleansing and Validation for Siebel Contacts and Opportunities for World Wide Corporate Clients for English and Non English (Uni code) data using Trillium.
- Involved in Trillium Siebel Integration, System Architecture and Application Design.
- Worked on processing of the email responses to the campaigns, captured them automatically based on the response parameters defined by the user groups and linked them to the appropriate campaigns.

- Completed functional design activities, Developed detailed functional design documents, UAT, Test scripts, Entry & Exit Criteria and Cut over Plan for production migration.
- Worked on Business Used Cases (BUCs) & Activity diagrams, Functional Requirement documents, architecture diagrams, presentation, project plans and other related documents.
- Assisted the client in high-level architecture for Trillium / SSSE & Replication Manager implementation at multiple sites.
- Assisted the client in resolving Siebel issues and design changes. Worked with customer on Siebel Replication Manager and Trillium solutions for Siebel. Trillium was used to clean, standardize and match Accounts and Contacts for US and international addresses.
- Assisted in design and development of Training material for the Users.
- Worked in an independent role and traveled extensively to meet user groups worldwide.

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.
- Worked on Business Used Cases (BUCs), System Used Cases (SUCs) & Activity diagrams, BRDs, SRDs and Functional Requirement documents with Traceability requirement matrix adapting rational methodology. Used Visio for process flow diagrams.
- Worked on Email response module to **Create Service Requests** from the inbound emails using Extended MAPI Adapter for MS Exchange. Used the business service to monitor to check the support inbox, parse inbound email to extract the sender's profile, sort the contents into service request component fields and automatically send acknowledgement to the sender with SR information. Modified the *Process Service Request method* to handle the routing of SRs in to the appropriate Queues based on the predefined business rules in the absence of Universal Queuing.
- Worked on Email Response Activity creation from inbound emails using Extended MAPI adapter for Service Request Updates. Activity was linked to the Service Request and notified the SR Owner about the updates made to the Service Request.
- Used Policy Patrol tool to monitor incoming emails to be processed as SRs or SR Activities.
- Created business rules for Auto forwarding the emails to be processed by the Siebel email response module.
- Worked on business rules to process the service requests based on the subject line of the inbound emails.
- Worked on Work Flow policies and processes to monitor the service requests based on the Customer SLA agreements. Created templates, processes, packages and profiles for the workflow.
- Worked on Service Request Parent Child function to enable the agents to Clone the SRs and also to co-relate them based on the business area functionality.
- Worked on Test Scripts, conducting UAT and analyzed test results for deviations from scope and fixed bugs.
- Communicated project status to the executive management on the progress of the project on a weekly basis.

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.
- Worked on Business Used Cases (BUCs), System Used Cases (SUCs) & Activity diagrams, BRDs, SRDs and Functional Requirement documents with Traceability requirement matrix

adapting rational methodology.

- Developed Project Plan to control the Project Scope, Schedule, Budget, SOX compliance and dependencies. Worked on Project Budgets for resource management and Hardware/Software requirements.
- Communicated project status to the executive management on the progress of the projects on a weekly basis.
- Project was SOX compliant and fulfilled all the key controls as defined in the process, documented all the approvals at every stage and published the same.
- Worked on Marketing, Sales & PRM modules, addressed the Partners sales stages from Prospect stage to Closure. Used Mass Data Utility Tool to load the leads and process them as per the business rules.
- Worked on Campaign management, Offers, Fund Requests and Invoice & Expense management related to Marketing Plans.
- Worked on Residential sales and corporate sales processes for Partners identified in each of the Market Segments. Provided inputs to the sales and marketing analytic reports.
- *Outlook Sync*: Worked on Outlook synchronization project that was the first Siebel initiative in the US to synchronize Siebel Data with MS Exchange servers. This Siebel Server Sync for Exchange (SSSE) was a new concept and the business users were educated about the benefits of the process and productivity benefits. Conducted sessions for the Business with Siebel and Microsoft involvement to capture requirements for synchronizing Business Contacts, Activities and Calendar based on the User's Organization structure. This initiative also required Hardware procurement, Licenses, Architecture approval, Load balancing and monitoring traffic.
- *Mass Data Utility*: Worked on a web based utility to upload predefined templates by the user base based on access permissions granted to update Siebel Database adopting same business rules that a normal used would be subjected to while manipulating Data on the UI. This utility had the capability to schedule, prioritize the Jobs uploaded and notify the user about success/failure of the transactions. Defined the User templates and high-level process to the user base. Worked with IBM on interface requirements.
- *Inheritance* Worked on this functionality that would help users to propagate Parent Attributes in an Agreement/Profile hierarchy to the child records based on the business rules agreed by the Business Users. This functionality helps the users to propagate the changes in one go rather than individual updates.
- Worked on Siebel Account/Contacts/Agreements/Entitlements in 7.7 versions. Made changes to the *address* applet so as to accommodate International address formats.
- Worked with the Testing / training teams to ensure that the test scripts/case and the training docs are in sync with the proposed requirements and traceable to the original BRs.
- Supported UAT and worked with the release management teams to manage the environments, deployment and product support / Handoff.

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.
- Was responsible for defining a common requirements' approval process across all design centers. Organized JAD sessions with inputs from the design teams. Proposed alternative solutions and work around process to bridge the gaps in the technical solutions offered by the design centers.
- Led the HP global business analysis for Partner Profiling, Programs, Certification, Agreements/Contracts, HP ID's, Fund Management and Contacts and translated business requirements into high level technical solutions and deign.
- Worked on Profiling of the Partners based on the classification of business they do with HP. This profiling was based on the Channel segments i.e Distributor, Reseller, Specialty Retailer, Internet Reseller etc and Target Customer Segments i.e., Consumer, Enterprise, SMB and Public Sector.
- Worked on Partner Certification process based on the inputs received from HP University and the criteria defined. Business rules were defined to accredit the Partner once the criteria were met and the business owner was notified.
- Proposed to use Siebel Access Groups to present HP Programs that were related to

Infrastructure, Business and Marketing.

- Proposed to capture legacy Contracts in Agreements in PRM with customizations to reflect Partner business in the Channel Segment identified. Contract addenda were part of the entitlements of the Agreements. The Contract captured the high-level legal terms and conditions (master services agreement), product descriptions, services and entitlements. Regions like Asia Pacific had need for Rate Contracts based on the type of Buyers.
- Defined parent child relationships between the agreements.
- Defined Service level agreements based on the Partner segmentation and regional business requirements.
- Worked with Siebel Systems for management of legacy Identifiers in Partner Pro. As Partner Pro was replacing several legacy systems it was necessary to support the downstream systems dependent on these. Proposed an MVG that was customized to capture all legacy ID's based on classification of the Partner.
- Worked on MDF module to extracts reports to help marketing teams to analyze the required funds, fund status and results. These reports were used to present Partner data to the management.
- Worked on Territory Management to manage sales and service territories in Partner Pro. Worked on rules to assign sales reps to sales teams based on skills and territory hierarchy. Mapped positions and accounts to territories using rules.
- Worked on setting up divisions and positions for Territory Management and assigned hierarchies. Defined rules and conditions how positions are assigned to territories. Created Alignments and ran it using workflow manager.
- Activated and Maintained Territory Alignments so as to make the assignment of positions to accounts effective and then generated reporting structures based on territory hierarchy.
- Partner Portal access and content management: Responsible for defining the Portal content for the Partner based on the Partner segmentation and classification. This included visibility of literature, Training material, Product information accesses and user control/administration.
- Worked with Siebel on Inheriting Partner Certifications, Programs and segments from Parent to Child as represented in the Partner Hierarchy. This functionality enabled the Partner either to inherit or dissociate the Parent Partners credits. This functionality helped the agents to avoid the cumbersome manual process.
- Provided inputs to all teams involved in integrating with Partner Pro. Worked with them on data mapping and data quality related issues.
- Was Business owner of all the Data Model requirements, coordinated with the development teams on all business decisions and expectations.

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.
- Function of the CCB was to reduce the bureaucratic hurdles in the decision making process and enable spot and quick decisions that helped expedite development / configuration process. All regions and the management ratified this process before it was put into place.
- CCB was a single point of contact for all business requirements, LOVs, Responsibilities
- Defined templates for capturing business requirements, LOVs and responsibility setup
- Defined the Data Model Changes, LOV and Responsibility set up processes, both regional and World Wide values. Regional values are specific to the region and all shared WW.
- Analyzed all the requirements, validated solutions with the design centers and Siebel and then made presentations to the to the user groups.
- The presentation included requirement analysis, configuration effort, risk assessment, integration assessment, change management and upgrade assessment.
- Developed a web-based tool to capture all business requirements and track the status of the requirements. This tool captured the end-to-end process that included used cases, customization, testing/test cases and implementation.
- Standardized the LOVs and responsibilities that helped reduce the maintenance effort.
- Published all the documents (Business requirements docs & Functional Design Documents), used cases, test cases and presentations on the CCB web page and published it on the HP Network.
- The board met twice a week with all regional and IT participation. The meeting agenda was published along with the meeting invite.
- CCB process was recognized by the HP PMO as the best run and well documented process. Other HP divisions emulated this process. The process was successful in streamlining the business requirements and timely approval and implementation.

Integration

- Worked with several Integration teams to provide Partner Profile data so that the right Partners are profiled.

- Partner Pro published all Partner Profile and Partner Contact data and universally it was the functional master. It was agreed that the Partner data was never to be updated by an external system.
- Partner Pro subscribed to Contract, training, products, catalogues etc.
- Partner Pro was integrated with SAP systems that managed the pricing and customer reference, with big management systems, CRM systems, training and certification systems called HP University, services system called HP services, Customer Knowledge Management systems etc.
- Worked on data matrix that reflected which system updated when and what information was updated. This was needed for accuracy and reliability of data between various systems.

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.
- Used HP Customer Identifier system to match Partners and Contacts for data quality. The logic was match, no match or candidate match based on score.
- Used Partner address and site to match partner record and contact address and account name with phone# for the contact matching.
- Data quality rules were 100% applicable to English Speaking Nations like USA, Canada, Australia and UK.

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.
- Identified all the Partner data that was to be sent to CRM. This data was presented in Read Only mode and the CC agents were never give access to manipulate partner data.
- Defined shared fields in case if the partners were customers. These shared fields were the common fields that the agent had access to update on the customer side, not on any partner screens.
- Defined a discrepancy report for all the shared fields that were out of sync with partner data. This report was generated daily and sent to Partner Pro to validate and accept/reject.
- Defined the lead criteria for the leads that were to be sent from CRM to Partner Pro. Defined the end-to-end process for lead routing between the systems.
- Worked on workflow business rules that defined lead routing and notification.
- Defined the business rules for the real time partner contact create/update from CRM to Partner Pro without leaving the CRM application, using the Virtual Business Components. In this process the user system called the regional Partner system based on the country and organization criteria defined.
- Worked on the BRD, FDD, test cases and test scripts for the end-to-end solution for the real time partner contact create/update.
- Created a worked around process for the countries were the integration was not live between CRM and PRM. This meant that the users in that regional could not create/update Partners or Partner Contacts as the Partner Pro system was not live. Workaround process included a UI layer using Microsoft excel and parsed data based on the EIM tables. Using the excel sheet the users could create or update and load data using EIM.

Testing

- Worked on defining the test cases for each of the releases.
- Created test scripts that were loaded into the Mercury test Director.
- Was responsible for providing the test data. Simulated data from the legacy systems.
- Worked with the infrastructure teams to provide suitable testing environment.

Training & Documentation

- Worked with the Global Process Consistency teams to provide the necessary process for user training.
- Provided the GPC teams with used cases and required inputs required for the training manual.
- Validated the GPC documents with the regional businesses for correctness and their acceptance.
- Worked on several BRD’s (Business requirement Documents) for the requirements received from the regional groups. These documents were used for WW approval and budget allocation and scheduling releases.

- Translated the BRD's into Functional Design Documents. The FDDs included detail requirements to the point that the IT was able to develop solution based on these.
- FDDs captured the specific requirements and the Meta data required.
- Developed test cases and scripts from the BRD's and FDDs.

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.
- Responsible for all the implementation of **Siebel SFA, Call Center, Marketing, Incentive compensation, SPS** and **Service** applications. Worked closely with sales & marketing & customer call center groups and provide technical solutions to meet the business requirements coming from these groups as well as cost and estimates
- Worked on **Clarify** version 5.0 to **Siebel 2000 migration** using **Enterprise Integration Manager (EIM)**.
- Worked on data migration from Clarify database to Siebel database. Extracted data from the Clarify-Oracle database all the data required and translated it in the way to be represented in Siebel. This required a clear understanding of the functional flow of the Siebel application and as well as the Clarify application.
- Worked on the relationships between various entities in Clarify and mapping their process to Siebel data structure (Interface tables).
- Worked on entity relationships in Clarify and the data representation in Siebel.
- Worked with the user groups to chart out the requirements and made presentations for the data and metadata requirements. Was the lead liaison between business owners and technical groups.
- Worked on oracle pl/sql scripts to load data into the siebel interface tables. Prepare data for **EIM**.
- Worked as the business lead working with technical group to translate the business requirements to technical requirements.
- Helped resolve the conflicts/discrepancies between business owners and technical groups in the area of requirements definitions.
- Worked on the issues pertaining to data types in both the database and offered solutions to resolve the issues within the framework of the contract. This required a deviation in the business flow of the business components representation and was successfully implemented.
- Worked on data validation in Clarify and Siebel before and after the migration process. The process was audited for accuracy and completeness. The data extracted was tested in isolation and also after dumping into the same database. Wrote oracle sql scripts for this purpose. The process required involvement of Finance department as sales contracts were evaluated for accuracy. The process also had to take care of the limitations of siebel order management / contracts module.
- Provided inputs to the training team about the deviations from the gap analysis. Also helped them prepare necessary training program for the sales and service agents.
- Worked on Oracle scripts to validate data in both Clarify and Siebel databases.
- Contributed to **Siebel upgrade** from 6.3 to **Siebel 7.0.3.** (Migration was done by Siebel professional services).
- Underwent training along with the Digex staff in **Siebel 7.0** : Sales, Service, Call center, Communications & Insurance verticals.
- Worked on Siebel Call Center, Contract, Sales, Service and Insurance modules in the latest version. Introduced the State model concept for the service requests escalation and notification using email. Worked on the conceptual development and coding of this assignment.
- Worked on communications module to handle the leased lines, routers and the trunk lines.
- Worked on **CTI integration** for the Call Center and service modules. Worked on the Genesis tool bar and **Nortel** switch and involved in the design and development and analysis of the

Queuing process and routing of the calls.
- Worked on the **Replication manager** to migrate, distribute and synchronize data from the Parent level to the regional node (London connected users). The data included database included both the database records and records in the Siebel File system. The process was used to provide latest data to the connected users accessing this regional node.
- Involved in the development of Order generation in **Siebel 7** using **Actuate** report. The once approved could be converted into a report from the information obtained from the line items, solution set and the discounts offered and agreement type. In Clarify application the signed contract was scanned and uploaded as an attachment to the application contract.
- Worked on **Insurance** vertical for the portal unit. Provided the customer information and the contract & hardware (product) details. This was part of the Infranet project for the billing and accounting. The Customer would decide for the insurance services whether to go in for the generic Digex plan or seek plans for compensation for the break down of operations for the reasons beyond the control or otherwise termed as Acts of God.
- Worked on the **workflow manager** in siebel to create new business rules as in Clarify. Escalation of the tickets and notification to the respective queue managers.
- Created test environment to test the **workflow** business rules.
- Worked on **workflow** business rules based on severity and time delay to trigger escalation of Service Requests in Siebel and generation of emails to the authorities concerned.
- Worked on **Assignment manager,** created rules to distribute workload among the Agents handling the tickets. Siebel Service Requests were assigned to the Agents based on their current workload in the system. Used workflow monitor to define the assignment workload parameters so as to make it real time.
- Worked on **Contact and Opportunity Management** in Siebel Sales. The screens were customized to reflect the type of agreement the Organization entered into with the Customer and their different levels of contacts based on the resolution the sales rep at Digex was seeking.
- **Opportunity Management** module was modified to reflect the service level agreement and the type of service to be provided to the account; this was similar to the business process in Clarify application. Agreements business component was linked to the opportunity component.
- Worked on **Siebel Visual Basic** for the auto-generation of contracts in Sales. The schedule level items were rolled up to be solutions of the contract. Wrote VB code to reflect the functional changes.
- Worked on **Siebel Visual basic** for auto-generation of projects in SPS module. This procedure would create predetermined list of activities for building a new server. It follows the same flow as specified by the agents.
- Worked on Business Object **Forecasts** in **siebel**. This was a deviation from the Clarify application. The Business object was configured to project the individual and group sales for the queue in **siebel**. The sales forecasts were monthly, quarterly and yearly. The respective reports were also modified to enable the management to have the appropriate data.
- Supported Unit Test and User Acceptance Test phases of development.
- Involved in the Training design and development program for the sales reps and the agents.
- This project was implemented in US and in UK.

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.
- Modified the case window to incorporate the new functionality of making fields active and inactive based on the requirements (field).
- Modified the **TCL** source code for performance Improvement in Scopus mode. Also assisted in making changes to the **Java** client using Java scripting.
- Pruned the code between TCL and oracle SQL.
- Worked on the **scopus / siebel call center/support/SFA** modules.
- Worked on bug fixes. This was a maintenance project.
- Perform maintenance and provide production support activities. Participate in data administration and data cleansing activities (email generated tickets only).
- Worked on the **siebel** trouble tickets and was responsible for the resolution of the same.
- Provide all the required inputs for **siebel** development of call center support and SFA modules.
- Was responsible for siebel business requirements.

- Worked on **Sun Solaris,** application was deployed on **Sun Unix** environment**. Scopus and Siebel** user environment was on **Sun Sparc.**
- Used **Siebel tools** to get the data structure hierarchy, for the purpose of migration.
- Worked on the GAP analysis for the migration from Scopus to Siebel applications.
- Understand, write, refine and technically review the business requirements and manage requirements documentation.
- Worked on data requirements and documented what data was available in existing systems and determined the data required to business requirements.
- Worked as a Technical lead assisting and giving direction to fellow developers.

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.
- Developed password management module that was in line with Ford Security policy in **Scopus**. Used Inform Team and created new business rules for this purpose.
- Used **workflow manager** to automate and manage several critical issues in the application.
- 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.
- Created **assignment manager** rules to obtain the workloads based on the diagnostics to determine the contractual staff requirements for each queue. This was for Forecasting staff requirements etc. Used workflow monitor to detect the data changes to business objects by the agents. Used batch mode and dynamic using workflow.
- Worked on **Scopus** timer request. A program to automatically calculate the time spent on a case/ticket by an agent without his/her interfering. The timer stars accumulating the spent time from the time an agent activates a case/ticket or when ever a new case is created through an incoming call or screen pop. This feature individually picks up the time spent on the cases by the agent when there are multiple case windows open. Thus restricting the calculation to only one active case window.
- Created interfaces to various legacy systems (Peoplesoft / HRMS). Accessing data from applications like PeopleSoft etc.. Used Enterprise Integration Manager (**EIM**) for data import into **siebel**.
- Wrote **oracle**-stored procedures to transfer data from **Scopus** database to the datamart.
- Perform configuration of the **Siebel** application to meet business process requirements and enhancement requests, ensuring end-user acceptance.
- Worked on design and development of **Siebel Call center, SFA and Support** modules.
- Worked on **Fax Integration** to the call center. Generated tickets(service requests) using the using the inputs received from the Fax server and assigned them to the default queue for further processing.
- Worked on Email Integration and generated service requests after validating the email contents and formatting the information. The SRs were then assigned to the email queue for further processing.
- Configured the **Opportunity management** module in **Siebel** to reflect the HR cockpit in **Scopus**. The opportunity business object was also displaying the indicative data.
- Provided inputs for the soft phone: **Genesys** Tool Bar for the **CTI** integration with siebel and for speed dial functionality.
- Worked on **Siebel CTI** for the call center module. Created commands and events for the soft phone activities in the Call center module. Worked on the Lucent switch.
- Worked on **Screen pops** and call tagging for the incoming calls through the **CTI**. Involved call

routing to the queues and agents associated with the queues.
- Worked on business requirements to evolve and develop the **Tool Bar CTI** and the requirements for the last dial functionality.
- Worked on **Siebel Smart Scripts in SFA**. Attached the scripts to the tree control based on the call queues into the application.
- Worked on the **Case management** module in **siebel**. The case tickets were linked to the smart scripts and to the Tree controls.
- Allocate work across **Siebel** and Technical specialists and maintain status of requests.
- Ensure completeness of detailed design of new functionality and enhancement requests.
- Trained and mentored the call center personnel by making literature document on **Siebel** application **(EIM, Configuration, Administration etc).**

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.
- Processing of surveys whenever cases or tasks are closed to gauge the performance of the technicians. This tool uses email interface and a bunch or oracle procedures and triggers.
- Worked on **Crystal reports** to obtain the data analysis about the surveys: surveys that are pending, received and waiting to be send because of the business rule constraints.
- Complete all assignments fully and in timely manner taking into account any given deadlines. Fully document work in progress such as projects, customer situations, test results, etc. in the appropriate media.
- Develop and implement procedures designed to enhance productivity and efficiency.
- Worked on the **soft phone** in Scopus application to callback the customer from the contact window.
- Worked on **screen pop** to launch the Scopus Application window and display the customer information to the agent for the appropriate queue.
- Worked on Queue management for Cases and Tasks to manually override and reassign the activities by the Queue Managers.
- Worked on Computer Telephony Integration (**CTI**) and Call Management Systems (CMS).
- Worked on call routing and call transfer using **CTI**. Worked on Williams communications **CTI**
- **Scopus** help-desk activities for Cadence US activities.
- Worked on **Scopus** Meta query format to make the database query independent of the case. The meta data query sent by the **Scopus** application to the database was enveloped so as to make it case insensitive. Manipulated the lookup query to bring in the desired results using TCL.
- Worked on Product migration from one tree version to another. This was a mini project because of acquisition of a new company. This migration-involved migration of all the products from old set to new with their respective tree and hierarchy combination and their respective cases and Tasks. Also to comment that the previous version of the product tree. This involved development in TCL and Oracle pl/sql.
- Reporting and maintaining **Siebel/ Scopus** bugs. Follow up and testing & updating **Scopus** bugs. Single point contact for Scopus related activities. Also responsible for patch updates.

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.
- **Scopus** Development, streamlining code and Customization (Call Center & Support Team).
- Responsibilities include application problem resolution, programming and unit & system testing.
- Worked on Inform Team for escalation & ticklers.

- Worked on Lucent **CTI.**
- Worked on multi call handling strategy and the global variables for call isolation**.**
- Worked on **Scopus** ver 3.8 (Support Team) and IBM mainframe platform.
- **Scopus** help-desk activities.

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.
- Created **Scopus** forms for the existing application and worked on TCL code for the same.
- Developed incident based contracting procedure using **Scopus** forms, TCL code and Oracle procedures.
- **Scopus** Development, streamlining code and Customization (Support Team).
- Fixing bugs for the existing SQL procedures and TCL procs.
- Worked on **Scopus** ver 5.2 (Support Team) and Oracle 7.3 .
- Generation of problem tickets by formatting incoming emails and sending back emails with problem id .
- **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.
- Created several stored procedures and triggers for the validation and updating of the data.
- Created **Scopus** Forms and wrote TCL and Oracle procedures for the same.
- Written **TCL** code for the interfaces between **Data Manager (IBM Mainframe)** and Scopus oracle Database.
- Developed the logical design of an online integrated system that would allow the company to integrate the **Scopus** Applications and the Data Manager (IBM).
- Worked on development of Local Services trouble management system to provide customer interfaces with **Scopus** Applications and data distributor.
- Worked on Screens and the underlying code to reflect the changes made to master and child trunk lines and their corresponding trunk lines and circuits.
- Worked on screens to maintain the cards and PINs in the communications service module.
- Worked on **Scopus** ver 5.2 (previous version was 3.8) - Support Team and Oracle 7.3

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.
- Created procedures for the validation of Customer and Product information.
- Created various forms using **Scopus** Applications to meet the user needs.
- Worked on Scopus ver 5. (Support Team) and Oracle 7X.

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.
- Designed chart of accounts and descriptor tables for the financial applications database
- Was responsible for customization, design, coding and development Forms 4.5/2.3, Reports 2.5/2.0 using AOL. Environment: Oracle Financials 10.4.
- Managed Project finance and accounting functions using custom financial application software - G/L, A/R, A/P, purchasing, inventory, budgets and cash management; total annual budget $6.5 million.
- Reorganized accounting procedures for efficient processing of transactions; redesigned reports to make them user friendly; redesigned chart of accounts to provide required rollup information for various programs funding.
- Participated in development of comprehensive contracts database using Access 97.
- Provide direction to program and project managers on critical contracting issues and foreign trade regulations.

Executive (7/91-12/94)
(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.
- Completed the analysis and design of an online integrated costing system.
- Developed and maintained the General Ledger systems for the Procurement and Marketing divisions.
- Performed interdepartmental reviews of financial internal controls and financial application procedures.
- Used cost tracking software to record contract costs.
- Prepare and negotiate contracts, subcontracts and modifications.