Smit S

Salesforce Admin Business Analyst

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**SUMMARY:**

* 7 + years of Extensive and Progressive Professional IT experience in the areas of CRM Salesforce Business Analyst, Design documentation, Business Process modeling, and UAT and Implementation coordinator.
* Techno-Functional experience with Salesforce Sales cloud and Marketing cloud as system administrator and guiding clients on CRM solution for sales, marketing and services teams.
* Experience with Oracle Big Machines Express CPQ Cloud Service for Salesforce.com to configure, price, quote, and create proposals immediately, and streamline renewals.
* 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.
* Lead / Account Management, Custom Reporting, Dashboards. Excellent Problem Solving Skills. Coordinating in production of a wide range of marketing communications. Lead Conversion process, email-to-case, web-to-lead implementations
* Used MS-Visio for process modeling, Use case Diagrams, business process flow diagrams.
* Experience with complete Software Development Lifecycle SDLC Waterfall and Agile with scrum.
* Worked extensively on various salesforce.com standard objects like Accounts, Contacts, opportunities, Products, Price books, Contracts, Cases, Leads, Campaigns, Reports and Dashboards.
* Proficiency in SFDC Administrative tasks like creating Profiles, Roles, Users, Page Layouts, Email Services, Validation rules, Approvals, Workflows, Reports, Dashboards, Tasks and actions.
* Qualified in defining requirements, customize the application to satisfy business goals and appeal to users, set up reporting Dashboards, keep an eye on availability and performance.
* Experience with Object Oriented Analysis and Design OOAD using UML, Rational Unified Process RUP , Agile Scrum, Rational Rose, Requisite Pro and Rational Clear Case.
* Created new user accounts and configure Salesforce.com to fit security needs at the user and organization levels.
* Skilled in gathering user requirements, Elicitation, Project planning, scheduling, controlling, performing GAP analysis and translating them into structured data, functional and usability requirements.
* Involved in Process flow documentation, Business requirements mapping, Defining, Documenting Deliverables and mentoring development teams.
* Worked extensively on user Requirements gathering, gap analysis, and development of functional specifications.
* Have Extensive Technical writing experience in areas of Client Server Web development including Skills of Creating, Editing and developing Business process documentation.
* Participate in regional Implementation meetings. Plan and execute all information systems on various platforms. Coordinate with internal deployment team to maintain all the necessary platforms prior to implementation.
* Coordinate with implementation manager and monitor all phases of projects and maintain all project objectives within required timeframe.
* Make the process of change as easy as possible, minimizing complications. Training employees, holding seminars and providing employees with assistance during the initial stages. Solving problems as they arise. Continually monitor the progress of an implementation program.
* Coordinate with implementation manager and monitor all phases of projects and maintain all project objectives within required timeframe.

**CERTIFICATION:**

* Salesforce.com Certified Force.com Developer (DEV 401)

**TECHNICAL SKILLS:**

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| SALESFORCE TECHNOLOGIES | Apex Language, Apex Classes/Controllers, Test Classes, Apex Triggers, Visual Force (Pages, Component & Controllers), Standard objects, Workflow & Approvals, Apex Data Loader, App Exchange, Web Services , Reports, Dashboards, Force.com IDE, Eclipse, SOQL, SOSL, Custom objects, S-Controls, Analytic Snapshots |
| SALESFORCE TOOLS | Force.com Eclipse IDE Plug-in, Force.com Explorer, Force.com Data Loader, Excel Connector, Force.com Platform (Sandbox and Production), Force.com migration tool.Lightning,Agile Development, Cloud computing Salesforce.com/CPQ/CLM/CRM |
| PROGRAMMING LANGUAGES | Java, Apex, C, C++  |
| WEB TECHNOLOGIES | HTML, CSS, AJAX, XML, JavaScript  |
| OPERATING SYSTEMS | MS Windows, Linux  |
| DATABASES | MS SQL Server, DB2 |
| METHODOLOGIES | Waterfall, Agile, Scrum v-model, SDLC, RUP |
| OTHER TOOLS | Toad, Informatica, Eclipse, SQL Enterprise Manager, SQL Query Analyzer, AQT, ER-Win, MS Visio, Power Designer, Putty and Edit Plus |

**PROFESSIONAL EXPERIENCE**

**Client: Citizen Bank - RI July 2018- Till date**

**Role: Salesforce Admin BA**

**Responsibilities**:

* Gathered detailed business and technical requirements and participated in the definitions of business rules and data standards
* Responsibilities include leading business requirement definition, translation of business requirements into SFDC terminology, and Service Cloud solution design review to ensure business requirement fulfilment.
* Extensive experience configuring and designing the Salesforce.com CRM solution to meet business requirements and support existing business processes.
* Designing and deploying solutions that optimized the Sales /Service cloud functionality and lead the implementation of these solutions.
* Prepared graphical depictions of Use Cases, Use Case Diagrams, State Diagrams, Activity Diagrams, Sequence Diagrams, Component Based Diagrams, and Collateral Diagrams and creation of technical design (UI screen) using Microsoft Visio.
* Build new processes and functionalities using Batch Apex for Robust Email Integration between Salesforce Marketing Cloud and Salesforce.
* Developed visual force pages using apex components.
* Experienced working on Agile Scrum and Waterfall methodology.
* Managed Auto response rules if customers approached beyond the business hours and toiled on Record Types, Validation Rules, Triggers and Page Layouts.
* Prepare test cases, test scripts for Navigational test, Functionality testing, UAT and GUI testing.
* Used SQL queries to collect relevant information from company's database.
* Meet with key stakeholders to gather detailed business and functional requirements to be built into Salesforce.com.
* Dealt with the senior managers on a regular basis to discuss the Use cases, Workflows and different requirements that come out of the stakeholder interviews.
* Acquire user requirements and designs for the Salesforce.com CRM to capture all sales and marketing needs.
* Implemented Service Cloud by decommissioning and migrating existing Siebel Servicing Portal.
* Implemented Marketing Sales, Customer Service, Call Center & Support Administration.
* Document requirements in agile tool - Rally or Jira or any other agile tool.
* Facilitated functional requirement gathering from system users and prepared business requirement documents (BRD).
* Used MS-Visio for flow-charting, Use- Case process model and architectural design of the application
* Implemented the Rational Unified Process (RUP) methodology guidelines with its various workflows and artifacts in Requirements Management and Development.
* Developed Visualforce Pages and Visualforce Components with Apex classes to provide functionality to the Visualforce pages.
* Implementing SalesCloud, Service Cloud, Chatter and custom applications in Force.com.
* Perform detailed data analysis when migrating data from Legacy systems to Salesforce.com
* Documented the “AS-IS” Business Workflows adhering to UML standards. Conducted JAD sessions to define requirements and finalize the Functional Requirement Document (FRD).
* Performed mass data imports using the API or an import tools as requested by CRM Manager or others after approval.
* Worked closely with Business Users to understand the Intended functionality of the legacy System which involves integration with SQL Server for Data Processing.
* Utilized Waterfall methodology to configure and develop process, standards, and procedures.
* Responsible for business process analysis that includes requirements facilitation, definition & analysis, alternatives, software selection, prototyping, business process design and mapping.
* Developed dynamic Salesforce.com Visualforce pages using Apex page functions and actions, designing them using HTML, CSS, and JavaScript.
* Wrote an Apex Trigger on Contact for cross object field update for reporting purposes.
* Conducted meetings and JAD sessions for project definition, resource identifications and deliverable prototype identification.
* Interfaced with developers, analysts, customers and project managers to discuss requirements and recommended solutions, to help resolve issues.
* Lead the User Acceptance Testing efforts to verifying that the developed reports meet the requirements.

**Environment**: Project Management, Quality Center, Excel, Sql, My Sql, Salesforce Marketing cloud, Agile, Outlook, MS Office, MS Project, Rational Rose, Rational Requisite Pro, RUP, and UML.

**Client: Land o’ Lakes, MN March 2017 – June 2018**

**Role: Salesforce Business Analyst**

**Responsibilities**:

* Identify and document AS-IS and TO-BE business process models during the Inception phase.
* Conduct requirements elaboration sessions in Salesforce CRM platform to review and validate business requirements.
* Manage all Business Objectives, Requirements, and Specifications Requirements in SFDC.
* Draft Use Cases for review by Business, Development, and QA teams to include process steps, alternate flows, acceptance criteria, objectives, and screen/report mock ups.
* Perform and guide BSA testing for SFDC Workflow.
* Administered Salesforce CRM applications for Sales, Marketing and Support Departments.
* Developed questionnaires for stakeholders, definition of the Use Cases and requirements along with control flows and user interface mockups in Visual Basic.
* Designed GUI and Navigation flows for the generic viewer facing the end user using MS power point, Visio.
* Perform and guide BSA testing for Salesforce application in marketing cloud.
* Worked on Record Types, Validation Rules, Triggers and Page Layouts.
* Develop and execute Test Scenarios, Test Scripts, test data documents based on Requirements and Design documents mostly in agile environment.
* Collaborated in Designing, developing, and deploying Apex Classes, Controller Classes, and Apex Triggers for email services and lead-to-contract conversion.
* Performed administrative activities on Sales, Service cloud by creating User, Roles, Profiles, Workflow rules and Approval process.
* Implemented salescloud and service cloud to improve customer retention and service delivery process improvement.
* Collaborate with QA and Development teams for requirements clarifications.
* Closely Work with the Development Team to understand the Technical Architecture and Technical requirements of healthcare Claims Workstation.
* Designed and developed Use Cases, Activity Diagrams, Sequence Diagrams, OOD (Object oriented Design) using UML and Visio.
* Managed and implemented customization requests by CRM Manager.
* Worked on Agile and Scrum Methodology for Salesforce custom app implementation.
* Designed and developed custom Visualforce pages and complex apex controllers to create, Commission and Sales Enablement widgets as per the requirement.
* Evaluated Business Development representative team needs while conveying the value of SalesCloud. Conducted Analysis and design of the Salesforce.com.
* Created APEX triggers, classes, test methods and visual force pages to implement custom functionality.
* Implemented search, filtering, and tagging features on page layouts to make it easier for sales to locate relevant marketing content and documents in SalesForce.com CRM Content.
* Worked on integration of two instances using Apex REST API call-outs and parsed JSON responses provided by third-party systems connected via REST inside Apex classes.
* Provide weekly Demo's with the client & record changes, track with detailed meeting minutes and acceptance.
* Analyzed and imported thousands of account and contact records using Data Loader.
* Analyze UAT (Business) and QA clarifications and provide required guidance. Manage the review process and maintenance of all requirements.
* As needed, facilitate daily SCRUM stand up meetings.

**Environment**: Salesforce.com Workflow and Approvals, Agile, Role Hierarchies, Sharing Rules, Reports, Dashboards, Custom Objects, Custom Tabs, MS Project, MS Excel, PowerPoint, MS Visio, Lotus Notes, MS Outlook.

**Client: FIS Global, Milwaukee, WI. Mar 2016 – Feb 2017**

**Role: Salesforce Developer/Admin**

FIS (Fidelity National Information Services Inc.) is an international provider of financial services technology and outsourcing services .FIS has a large portfolio of products for the financial services sector, including both retail and investment banking.

**Responsibilities**:

* Working as a Business Analyst on releases of a national CRM System: planning, scoping, gathering requirements, costing and assisting with the implementation of enhancement
* Participating in the solution design process
* Performing and monitoring the integration testing with business users, enabling setup of test management in testing tools
* Project managing multiple changes, ensuring completed handover to Application support/helpdesk
* Developing sound knowledge of CRM system, processes, strategies and initiatives
* Ensuring the CRM system is up to date and being utilized effectively, as well as adhering to agile processes and policies.
* Leading functional designs that include User Interface configuration and customization of Salesforce.com cloud computing solutions
* Documenting business process flows and business requirements as well as perform process gap analysis against critical requirements
* Mapping client business process and requirements into the capabilities of Salesforce.com and the Force.com platform.
* Configuring role hierarchy and profiles to control user visibility so that access to data rolls up from lower levels to higher levels in hierarchy
* Providing org-wide access settings and object sharing rules
* Creating and configuring objects to provide functionality to applications, i.e., page tabs, record types and page layouts, reports, dashboards, etc.
* Developing assignment rules, escalation rules, and workflow rules, etc.
* Leveraging Salesforce.com’s Chatter, Knowledge, Salesforce.com Flow, Twitter and Facebook integrations and Analytics
* Facilitating user feedback sessions, User Acceptance Testing (UAT), and training
* Risk identification and escalation to bring about resolution to meet client standards

**Environment**: Salesforce, Oracle 11g and Visual Force, Force.com, Apex Scripting.

**Client: FINRA, Rockville MD Oct 2013 – Sep 2015**

**Role: Business Analyst**

**Responsibilities**:

* Involved in creating gap analysis document, clearly identifying the data, business process and workflows of the organization with respect to salesforce.com implementation.
* Updated Business Requirement Documents and Conducted GAP analysis.
* Administrated and monitored the company's Salesforce CRM application.
* Created the workflows for automated lead routing, lead escalation and email alert.
* Designed and developed Project Scope Document, Project Plans, Project analysis and Project Deliverables, Business Requirements Document.
* Personalized Tabs for various business user groups and business centers.
* Experience in SFDC Integration using Web Service and Apex Programming, Salesforce Service Cloud expertise.
* Prepared and executed test cases for Navigational test, Functionality testing and GUI testing using Test.
* Created Profiles, Roles based on Organization role hierarchy and implemented.
* Worked as a Business Analyst in an Agile environment by eliciting Business Requirements from Business users using number of JAD sessions.
* Record-Level and Field-Level security and configured their sharing settings.
* Involved in gathering customer requirements from business user teams spread over the Sales, Marketing and Customer service.
* Set up Marketing Campaigns, Campaign Hierarchies, Lead Queries, Assignment rules, Web-to-Lead and Auto-Response rules
* Developed and Customizing salesforce.com application based on the user needs.
* Developed field & page layout customization for the standard objects like Account, Contact and Leads.
* Defined functional and non-functional requirements to Use Case narrative using the UML diagrams.
* Maintained and gave permissions to communication templates based on Profiles.
* Worked on various salesforce.com standard objects like Accounts, Contacts, Leads, Opportunities, Reports and Dashboards.
* Designed, and developed the Custom objects, Record Types, Formula fields, Page layouts, workflow rules, tasks, emails and alerts to track customer related tasks and activities.
* Used field level security along with page layout to manage the visibility and accessibility of fields for different profiles.
* Customizing Company Profile, Security Controls and Communication Templates of the organization as per the organization requirements.
* Primarily involved in developing use case document for the application, traceability matrix, system requirement specification (SRS) and presentations for proposed solutions.
* Expert CRM Fusion User with advanced skills in Power Grid, Single Table Dedupe, Mass Lead Conversion, Lead to Account Deduplication, Mass backup, Mass Ownership changes.
* Supervised, examined and specify stakeholder needs.
* Managed salescloud.
* Deliver continuing support in the areas of SFDC configuration, administration, reporting, data migration, solution design and project co-ordination.
* Implementation of Data Loader for loading the data.
* Provided offshore team with necessary and KT and assistance whenever required.
* Scheduling daily standup call with Offshore team.
* Used Data Loader to read, extract, and load data from comma separated values (CSV) files or from a database connection.

**Environment**: Salesforce.com platform (Apex, Visual Force, Data Loader, Workflow and Approvals, Quotes, Sharing Rules, Email Templates, Reports, Dashboards, Custom Objects, Custom Tabs, Excel enabler for Sales force), Agile, MS Project, MS Excel, PowerPoint, MS Visio, Lotus Notes, MS Outlook.

**Client: ICICI Bank, Hyderabad, India Aug 2012-Sept 2013**

**Role:** **Business Analyst**

**Responsibilities**:

* Involved in building the Salesforce CRM Application for Freddie Mac, VA.
* Interacted with various business team members to gather the requirements and documented the requirements.
* Performed effectively in agile software development environment, supporting frequent requirement elicitation, development and testing in constant business presence.
* Analyzed the scope of the Requirements and managed requirements to avoid Scope Creep.
* Mapped processes for business's disbursement of Marketing Development Funds (MDF) to distribution partners
* Participated in Requirement Gathering Sessions & JAD Sessions.
* Created user Roles, Profiles and sharing settings.
* Prepared Use Cases based on Business Requirements and High Level Design using MS Visio.
* Conducted the UAT with the Business users and gathering feedback and providing the same to the Development team.
* Created workflow rules and defined related tasks, email alerts and field updates.
* Created custom Dashboards for Manager's home page and gave accessibility to dashboards for authorized people.
* Created new custom objects, assigned fields, designed page layouts, custom tabs, components, custom reports.
* Reviewing the test cases provided by the QA team and providing feedback.
* Implemented pick lists, dependent pick lists, lookups, master detail relationships, validation and formula fields on the custom objects.
* Implemented Web to Case, Email to Case functionalities to provide a better support to the customers.

**Environnent** SQL server, Agile, Oracle, Web Services, Restful Services, CRM, Sales Force JSON, XSLT, WSDL.