**Purushotham Naidu sandra**

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# Objective:

To take a challenging position to bring technology and business together. Be involved in resolving business challenges by assimilating & analyzing the business scenario and resolve the problem to achieve business success. Demonstrated analytical skills, structured thinking, solution design skills and assessment of strategic impact on the overall business requirement along with my leadership skills should help the organization holistically resolve the business challenges in the best possible way for the fulfillment of organizational goals.

# Career Summary:

* 12+ Years of experience in Business Analysis & CRM Consulting. Executed multiple on-site/conference requirement gathering workshops across different locations
* Proficient Knowledge and experience of Salesforce CRM – Sales, Marketing and Service
* Proficient Knowledge and experience of Oracle CRM tools like Oracle Siebel CRM on Demand, Oracle Sales Could, On Demand Marketing Cloud
* Experience in handling 15+ End to End CRM Project Implementation from Requirement gathering till post Go-Live Support across industries with effective co-ordination across business and IT stakeholders across all phases the project.
* Experience and knowledge of Software Development Life Cycle (SDLC) methodologies like Waterfall & Agile
* Responsible for Client deliverables (BRD, FSD, User Training etc.), Project Status for stakeholders, Project Co-ordination, and Application Development
* Contribution in deriving the overall Effort Estimate for the Project

|  |  |  |
| --- | --- | --- |
| Company Name | Start Date | End Date |
| **Adobe India** | Dec,2017 | Till Date |
| **CRMIT Solutions Private Limited**  <http://www.crmit.com/> | 27-May-2010 | Dec, 2017 |

# Key Responsibilities Handled:

* Conducting On-site requirement gathering workshops, this included organized review meetings, question probing sessions for requirement elicitation & documentation deliverable.
* Capturing Non-Functional and Technical requirements for the project which gets embedded as part of the Business Requirement document.
* Preparing Functional specification document by co-coordinating with development team
* Techno- Functional role for projects. Involvements in technical design of custom components build on web-services, java-based web application, Schema definition-design etc.
* Contribution towards Effort Estimation and Project planning.
* Pre-Sales activity for proposal submission.
* Contribution toward Business Process definition, User Trainings, Business Operations and process enhancement with system usage.
* Managed relationship with programmers and bridged communication between business requirement ( End Users) and development team
* Involved in preparing Process Flow Diagram & other use-case Diagrams using MS Visio
* Helped developing teams technical design and mapping data / functionality
* Actively Participated in internal presentations, I.e. knowledge transfer to extended development team, Quality team etc.
* Conducted project meetings successfully by coordinating all users, technical staff and key stakeholders.
* Supported in QA testing, UAT and Go-live activities
* Providing a link between the company, customer, the development team and any third-party regarding software functionality throughout the development cycle
* Travelling to various locations to engage with multiple stakeholders across the company to ensure all processes and requirements were accurately defined.
* Feasibility study for any Change request during the project and follow the process to implement the same.
* Proven Project Management skills by contributing and handling project management activities like, effort estimate preparation, WSR (weekly status report) meeting, leading alignment meetings, internal & external deliverables/milestones tracking.

## Key Experience / Accomplishments

1. **Project Name: Professional Service Automation, Adobe Consulting Services**

Duration: December 2017, Till Date

Role: Product Owner / Business Solution Analyst

Description:

* Catering all the consulting service implementations needs using Salesforce / Financial Force ERP

Responsibilities:

* Productization of the PSA
* Product Road Map
* Solution and Design of the PMO, RMO, Billing and Invoicing Modules

**Technologies & Tools Used:**

**Salesforce.com, Sales Cloud, Financial Force ERP, SAP ERP for Billing, and Invoicing**

1. **Project Name: Sales Automation for a leading Health Care Company in USA / UHG**

Duration: Till December 2017

Role: CX Solution Consultant

Description:

* UnitedHealth Group is a distinctively diversified health and well-being company headquartered in the United States, and a leader worldwide in helping people live healthier lives and helping make the health system work better for everyone
* United Healthcare offers health insurance plans to meet the needs of [individuals](https://www.uhc.com/individual-and-family) and [employers](https://www.uhc.com/employer) and also offer dental, vision and Pharmacy products
* To track individual and employees healthcare needs, Salesforce was chosen to be the CRM Platform to manage Individual/Organizations and their membership

Responsibilities:

* Requirement gathering with BRD, FSD preparation
* Interaction with internal development team for solution design and technical design
* SPOC for project tracking, status update, implementation and UAT
* Security Design for Traditional and Private Exchanges
* Organization Structure and Company Profile Settings
* Opportunity design to track 5 Product category in a single Opportunity
* Client Reference Module Design for Account and Opportunity and Contact
* Design of Stepwise Integration
* Account Level Business Planning
* Consultant Firm/Consultant History Tracking
* Competitor Module design to track Account and Opportunity Competitors
* Business Groups on Health and Customer Value Group design
* Kanban Progression design and configuration for Opportunity Sales Cycle
* Work Book Creation for Account, Contact and Opportunity and for all customer Object(s)
* Achieving business rules via Workflows, Process Builder, Validation Rules and formulas
* Daily status meeting with Business Team for progress tracking and status updates
* Conducting UAT and migration of meta data to UAT Environment
* Data Preparation and mapping and Data Migration
* List / Search/ Audit for Account, Contact and Opportunity Modules
* Design of Opportunity Sales Cycle and setting up the Sales Process
* Einstein Analytics , creation of Reports and Dashboards using Datasets with Recipes
* Daily internal stand up meeting to track the progress and discuss the project status
* Daily Status Report / Monthly Status Report with Project Progress

Technologies & Tools Used:

**Salesforce.com, Sales Cloud, LDS, Einstein Analytics**

1. **Project Name: Sales Automation for** US Based leading manufacturing customer/Onsite, Atlanta, GA

Duration: September 2015 to December 2017

Role: CX Solution Consultant (**Onsite Assignment for 2+ Years**)

Description:

* Interface is a leading carpet manufacture in US. We have implemented CRM Solutions to cater the Quoting Process
* CRM is integrated with Website and ERP systems

Responsibilities:

* Onsite assignment for 2+ years
* Responsible for Sales Automation and CPQ Module across the globe using SFDC as a CRM Platform( Global Rollout)
* Involved in ENd2END Implementation, right from the requirement gathering to project closure
* Security and Data Model set up
* Sales Process set up
* Opportunity Team Splits set up / commissions
* Quote Process for each business region with templates
* Product catalog, Price engine design and configurations
* Approval Engine design and set up
* Mobile Application design – Online and Offline
* Leadership Reporting
* Support strategy Rollout (Global, all 3 regions)
* Effort Utilization reports on weekly/ Monthly basis to review with Business and IT Team
* Website Integration with SFDC for direct Orders
* Change Management Rollout for all 3 regions
* Working with business team to list down all the new requirements and bucketing the same for quarterly release as per the budget allocation
* Impact analysis and solution design
* Onsite/offshore coordination and setting up the right expectations to the team
* Interaction with internal development team for solution design and technical design
* SPOC for project tracking, status update, implementation and UAT
* Work Book Creation for Account, Contact and Opportunity and for all customer Object(s)
* Achieving business rules via Workflows, Process Builder, Validation Rules and formulas
* Daily status meeting with Business Team for progress tracking and status updates
* Conducting UAT and migration of meta data to UAT Environment
* List / Search/ Audit for Account, Contact and Opportunity Modules
* Design of Opportunity Sales Cycle and setting up the Sales Process
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Technologies & Tools Used:

**Salesforce.com, Sales Cloud, Einstein Analytics/Wave, Power BI**

1. **Project Name: Cruise Web - Leading U.S Cruise Vacation Planner**

Duration: April 2015 to September 2015

Role: CX Solution Consultant/ Teach Lead

**Project URL:** <http://cruiseweb.com/>

**Project description:**

Cruise Web helps you to plan your dream vacations with cruising providing different Destinations/Cruise Lines/Deals etc. where the visitors fill out the contact form on cruiseweb.com website for a Personal Quote. In order to avoid creating multiple leads for the same client,

The business needed to automate the Lead Management Process to avoid duplicate and have proper Lead assignment based on business rules.

Following modules were developed for the system.

**Web-to-Lead Form:**

A lead form has been created and hosted on crusieweb.com customer site which

Captures basic details of visitors and their interest.

**Lead Assignment Rules:**

Rules defined to assign Leads created to different Queues based on the Cruise Line

Selected by the web site visitors.

**Apex Trigger:**

Trigger to automate the Lead Owner assignment based on the existing Person Account in the system to avoid manual merge activity by the users.

**Deployment**:

Production deployment using Change Set and Ant Tool.

**Technologies & Tools Used:** Salesforce.com, Service Cloud, Configuration, Visualforce, Apex, Apex Triggers, Ant Tool.

1. **Project Name: CRMIT’s CRM++ Product: FieldSalesPro (Education vertical)**

Duration: January 2014 to December 2014

Role: CX Solution Consultant/ Teach Lead

**App Exchange URL:** <https://appexchange.salesforce.com/listingDetail?listingId=a0N3A00000EFmIxUAL>

**Description:**

This product facilitates the Students aspiring for higher education to connect with Advisors/Counselors & apply for higher education in universities across the world.

**Responsibilities:**

* + 1. Business Requirement Document preparation
    2. Solution Design & Documentation
    3. Technical Design Documentation
    4. Working closely with development team leaders to ensure deliverables match the architectural vision
    5. Configuration/Administration Activities
    6. Prototype/Code Reviews

**Technologies & Tools Used:** Admin/Configuration, HEDA Architecture, SF1, Lightning Design System, Lightning App Builder, Apex, JavaScript

1. **Project Name: CRMIT’s CRM++ Product: FieldSalesPro (Maintenance & Repair)**

Duration: January 2014 to December 2014

**App Exchange URL:** <https://appexchange.salesforce.com/listingDetail?listingId=a0N3A00000EFpB8UAL>

Role: CX Solution Consultant/ Teach Lead

**Description:** FieldSalesPro is a Community Portal implementation to enabling existing customers to submit/manage service (maintenance & repair) cases and assets through a portal and enabling Org’s Service, Sales, and Technician roles to process those customer service cases

**Responsibilities:**

* + 1. Business Requirement Document preparation
    2. Solution Design & Documentation
    3. Technical Design Documentation
    4. Working closely with development team leaders to ensure deliverables match the architectural vision
    5. Configuration/Administration Activities
    6. Prototype/Code Reviews

**Technologies & Tools Used:** Salesforce.com, Community Cloud, Admin/Configuration, SF1, Lightning Design System, Lightning App Builder, Apex, JavaScript, Submission of App to App Exchange

1. **Project Name: - Marinetti - Leading Fashion Accessories Manufacturer (Hong Kong, China)**

Duration: January 2013 to December 2013

**Role:**  Business Consultant

**Project description:**

The business needed an enquiry management solution, to be provisioned on the existing Community Portal, to allow customers to place enquiries directly. The solution was delivered using Force.com platform with use of Community Portal, and associated builds of workflows, Apex triggers, Apex classes and Visual force pages.

Following modules were developed for the system.

**Self-Registration of customers**

Provided ability for a user to Self-Register in Communities Portal and also select the Company/Country details where he wants his Order to be sent.

Once user Self-Registers a notification is sent to Administrator to provide him access to Country specific products-based Retailers assigned to him.

* Account
* Contact
* User
* Contact Retailer

**Enquiry Creation**

Provision to create an Order Enquiry for multiple products based on Price Books related to various countries and Retailers assigned, also provided multiple products selection page where User can select multiple products in a single page instead of navigating through lookups.

Some of the implementations provided as part of this phase were

* Online Enquiry Creation form
* Custom Retailer look-up page
* Online Details and Product selection
* Cancel Enquiry

**Enquiry Status**

Provision to check the status of Enquiry Order placed by the user based on using combination of Filter fields like (Ordered Date, Ship to Date, Status, and Products etc.).

• Online Enquiry Search Page

• Online Details Search Page

• Product Search Page

**Responsibilities:**

* + 1. Designed various modules like **Order Form**, **Product Selection Form**, **Lookup form, Cancel Form, Homepage Components etc**.
    2. Configured **Communities Portal**.
    3. Produced and presented prototypes to customer.
    4. Built and unit tested several modules.
    5. Supported the system testing, integration testing and acceptance testing by customer.
    6. Conducted all project communications with customer and managed the project
    7. Managed the project beginning with scoping to closure.

**Technologies & Tools Used:**

Visualforce & Apex language provided by SF, Apex Triggers AJAX,

Homepage Components, JavaScript and JQuery, HTML, Configuration of Workflows.

**Other Projects: 2010 to 2013**

Marsh USA and Canada - Service Automation (Oracle CRM On Demand)

AMBU – Sales Automation (Oracle CRM On Demand, Marketing On Demand)

KODAK – Partner Relationship Implementation

INSEAD– Sales Automation Integrated with Eloqua

Kanno Travels – Oracle Right Now (Service Line Automation)

AIR CANADA – Service Automation

**Key Competencies and Skills:**

|  |  |  |
| --- | --- | --- |
| Estimation and planning | Business Analysis & Consulting | Support Strategy Rollout |
| Change Management | Reports and Dashboards | Data Migration |

|  |  |
| --- | --- |
| **Technology Area** | **Skills** |
| Salesforce.com |  |
| Declarative development tools: Process Builder, Visual Workflow, |
| Data migration, Schema Builder, Access Controls |
|  |
| Programmatic development tools: Apex classes and triggers, Visual force, Lightning Components (LDS) |
| Einstein Analytics | Security Predicates, Dataset and Data Recipe, Data Flow Schedule |
| Reports and Dashboards |
| Oracle CRM on Demand | Administration, Configuration, Forecasting, Data Security, Sales Process, Service Process, Marketing Automation, Reports and Dashboards |
|  |
| Data Migration, Workflows, Validation using expression builder |
|  |
| Oracle Service Cloud (Right Now) | Service Automation, Knowledge Management |
| Visualization Reporting tools | Power BI, Tableau |

**Onsite Assignment: Atlanta, GA**

* US Based leading manufacturing customer – onsite assignment for 2+ years
* Responsible for Sales Automation and CPQ Module across the globe using SFDC as a CRM Platform( Global Rollout)

**Education and Personal Details:**

Gender : Male

Date of Birth : 28 June, 1985

Passport No : K7764539

Languages : English

Degree : Master Degree in Computer Applications, 2009