# Sudarshan Kataria

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# Professional Summary:

* 19 years of Information Technology experience in functional and technical design/architecture & software development in diverse domains including 11 years of Salesforce.com platform experience
* Experience of 5 major and **complex rollouts** of Salesforce solutions (Sales, Marketing, Community and Service Clouds) integrating with several other enterprise platforms
* Certified Salesforce **Administrator**, Salesforce **Developer,** Salesforce **Sales Cloud Consultant** and Salesforce **Service Cloud Consultant**
* Well versed in **Solution Definition** and **Implementation** from inception to rollout
* 5 years of Salesforce Lightning component (Aura) and Lightning web components development experience
* Implementation experience with Callidus Cloud & Steelbricks CPQ
* Architect and design the solutions / integrations using scalable design patterns and services using **SOAP** and **REST** protocols
* Experience working across various **SFDC implementations** covering **Sales Cloud, Service Cloud, Community Cloud, Contact center, Chatter & App-exchange applications**
* Manage **Data Migration** and **Data Integration** activities across platforms
* Experience in **migrating data** from legacy systems to Salesforce using Apex Data Loader
* Experience in integrating Salesforce with ERP applications using **ETL tools (Informatica)**
* Expertise in conducting joint Requirement planning and **joint application design** sessions with business users, senior management and IT groups to formalize acceptable project goals
* Drive **Cross functional** collaboration across different stakeholders
* Strong experience writing project business process logic documents, designs and technical specifications
* Strong development background in Object oriented languages. Experience developing code on force.com platform using Apex, Visual force, Java script, SOQL/SOSL
* Lead large global technical / functional teams across **multiple technologies** and

# domains

* Worked closely with Business Users to enable business processes using **SFDC.**
* Expert in using Change Sets, Packages, Eclipse Data Export, Deploy to Server – Apex Classes, Apex Component, Apex Page, Apex Trigger, Static Resources
* Proficiency in **SFDC Administrative tasks** like creating Profiles, Roles, Users, Page Layouts, Email Services, Approvals, Workflows, Reports, Dashboards, Tasks and Events
* In-depth experience in **CRM business processes** like Forecasting, Campaign Management, Lead Management, Pipeline Management, Order Management, Account Management, Case Management
* Extensive experience in analyzing business requirements, entity relationships and converting to **Salesforce** custom objects, lookup relationships, junction objects, master-detail relationships.
* Configured and maintained complex user **security permissions** in compliance with

organizational needs

* Excellent communication, analytical, interpersonal, and presentation skills; expert at managing multiple projects simultaneously.
* Enthusiastic Team player with exceptional communications skills and problem solving abilities that can aggressively identify opportunities, develop great teams and offer excellent client services

**Education:**

Bachelor of Engineering, Computer Science (2002) from Maharishi Dayanand University, India

**Skills:**

* + **Sales Cloud:** Salesforce automation including Leads, Web to lead, Accounts, Contacts, Opportunities, Contract, and Partner Portal
  + **Data Migration Skills & Tools:** Data Analysis, Data Cleansing, Data Normalization, Data Migration, Salesforce.com Data Loader, GitHub, Force.com IDE
  + **Service Cloud:** Case Management, Solutions, Ideas, Customer Self Service portal, web to case, email to case, CTI (Genesys)
  + **Community Cloud**: Implementing Sales and service cloud communities
* **Business Modeling Tools:** UML CASE Tools, MS Visio, MS- Project
* **Configuration Skills:** SFDC Standard Object Configuration: Campaigns, Leads, Accounts, Contacts, Opportunities, Forecasts, Products, Assets, Contracts, Cases, Solutions, Ideas, and Custom Object Development Field creation, Page Layout creation/editing, Related list customization, Record Types, Field Level and Object level security, role hierarchies, sharing models, Reports, Dashboards, Formula Fields and Cross Object formula Fields
* **Coding**: Lightning components, Apex Trigger, Apex Class, Apex Test Methods, Apex Web Service, Visual force Pages, VF Components & Controllers
* **Design/Development methodologies:** Agile-Scrum, Waterfall, Continuous integration
* **Deployment tools**: Jenkins, Copado, Auto-rabbit, GIT

**Work Experience:**

**Client: Cloudforia Aug 2022 – till date**

# Service Cloud Architect

Build Salesforce service cloud contact center from ground up for cloudforia clients. Implement use cases such as automated call routing, SMS transfers, linking calls to cases, voicemail setup, after hours calls routings, automatically linking calls to salesforce records. Implementing agent dial in extensions, complex omni channel ﬂows and lambda functions for call routing.

Responsibilities (role: CRM Architect):

* Design and lead development for greenfield Service cloud voice implementations
* Integrate / Configure Amazon Connect into Salesforce to deliver a new contact center

solution to support voice conversations, digital channels, and CRM data in real time.

* Implement Voice transcription from Amazon Connect for agents and supervisors to view call and CRM data side-by-side in the Service Cloud console.
* Implement omnichannel routing for phones and other communication channels to help Agents resolve issues in record time and deliver more personalized customer service.
* Configure complex call flows using lambda functions to decide the calls routings based on several salesforce data objects

# Client: Splunk Jul 2021 – July 2022

**CRM Architect Customer Portal Team**

Community cloud implementation for various Splunk cloud & on-premise solutions for enterprise customers.

Responsibilities (role: CRM Architect):

* Design and lead development for a brand new community replacing the old community
* Migration of contact center from legacy applications to Service cloud voice (Amazon connect)
* Enhance service cloud implementation: Implement service omni-channel for better customer service experience
* Design and Implement collaborative and offline chat with the company's website to open automated and agent supported cases
* Lead introduction, implementation and training of deployment tool Copado for Sales and service teams
* Worked with platform support team for prod deployments methodology changes with the new copado tool
* Implemented Case Swarming, a new salesforce beta feature for skill based case collaboration and routing that leads to quicker case resolution

# Client: Palo Alto Networks Mar 2019 – Jun 2021 Application Architect

**Global Customer Support**

Service cloud implementation for supporting various cybersecurity solutions supporting global clients in over 150 countries. Support for advanced firewalls and cloud security solutions for large enterprises. Projects involving enhancing applications to improve customer engagements while reducing the high case handling price tag of approx. $400 per case. Develop solutions with huge emphasis on promoting the knowledge base by motivating SMEs to write efficient articles

Responsibilities (role: Application Architect):

* Design and Integrate existing Service cloud implementation with leading Gamification platform ‘Bunchball’ to promote healthy competition between KDEs (Knowledge domain experts) for writing meaningful knowledge articles
* Enhanced service cloud knowledge base by introducing credentials like badges, certificates, learning trails to motivate teams
* Implementations resulted in tremendous article creation rate reducing case handline price by $75 bringing savings of approx. 1.2M$ for average of 16000 cases each year
* Design solution to Integrate service cloud with leading AI powered search platform Coveo for bringing enterprise-wide data and the power of machine learning into Salesforce
* Promoted and shifted the development paradigm from traditional lightning Aura framework to LWC (Lightning Web Components)
* Developed cutting edge customer community with company branding following marketing guidelines
* Implementation of deployment pipeline using github actions
* Enhanced platform to reduce customer handling time by introducing concepts like sub-cases to split larger customer facing issues between internal teams for quicker resolution
* Designed the migration from legacy call center application solution to new CTI based Genesys solution

# Client: Sunrun Inc. Jan 2018 – Feb 2019

**Development Lead**

# Workflow Management System (Lightning Application)

Workflow management system is a platform to manage, track and report on all Phases of a Solar project lifecycle from Customer Signature to PTO (permission to operate) and incentive receipt. Application will enable visibility and reporting for real-time project status and will provide an interface for task management to inform users as soon as they are able to begin executing tasks. Application will also define the tasks required for a project.

Responsibilities (role: Lead Lightning Component Developer):

* Develop Lightning Components - both within the Salesforce Lightning Design System and by writing custom Lightning Components in Java Script within the Aura framework
* Coordinate with business and technical teams to provide recommendations with cost, estimates and timelines for building application components
* Plan releases and sandbox environment deployments
* Adjust sprint and release plan as required to accommodate change request and re-prioritize work
* Conduct daily scrum/stand-up, sprint elaboration and retrospective meetings
* Conduct show and tell for the business teams
* Provide solution architecture recommendations, help application development team with deployment, maintenance and support

# Client: Becton Dickinson Jan 2017 – Jan 2018

**Lead Developer / Community Architect**

# Basecamp (Lightning based Customer community)

Basecamp is a customer engagement platform to engage BDs Medical management systems customers and provide a holistic view of how their systems are performing. Device data integration feeds into the basecamp community and provides graphical views of system performance and usage to help track the medical devices installed at hospital sites. Basecamp also gamifies the education programs and provides dashboards for displaying individual and company performance metrics.

Responsibilities (role: Lead Lightning Component Architect/developer):

* Construct customer community from ground up using Lightning component framework
* Port the existing portal visual force pages to lightning components. Construct using a mix of bootstrap and SLDS UI frameworks
* Develop custom lightning components with minimal use of standard salesforce components
* Construct highly responsive community pages utilizing jQuery and JavaScript
* Integrate with Hadoop for device data integration
* Integrate with Qualtrics for customer surveys
* Integrate with Cornerstone for education and certification programs
* Define mappings and create mapping documents for various integrations that will be needed for the new platform
* Define third-party applications Implementation and integration requirements with SFDC and onboarding new clients

# Client: SunPower Corp, San Jose July 2014 – Dec 2016 Salesforce Solution Architect

**Salesforce Partner relationship management implementation**

SunPower’s Salesforce organization has both sales and service cloud implementation with 7000+ users including internal and partner users spread across US, Europe, Australia and Middle East.

Sales cloud enables direct and indirect marketing and sales for various solar systems for residential, commercial and power plant business supporting various financial products like Lease, cash, loan. Solar systems offerings include leasing the system, buying in cash or loan via a financial institute. Partner relationship management tools provide ability for dealer partners to manage their solar system sales, installation, partner registration/on-boarding, profile management, warranty registrations, partner quoting, lead to partners and Order submission / delivery and grid interconnect project management.

Responsibilities (role: Solution Architect):

* Involved in the analysis, design and development of the overall project architecture from inception of the project
* Determine a solution approach and discuss with various stakeholders and the business owners
* Validate architecture and design on the project
* Identify and promote reusability of functionality within Salesforce platform, including integration components
* Identify, communicate, and manage risks that may interfere with project execution or success
* Provide project architecture strategy and guidance for salesforce rollouts, and assist with design for adoption strategy
* Assist with deployment Plan and Go-Live Support
* Built Integration with the company’s website via Eloqua to capture leads using web2lead forms
* Document and established traceability between the Business requirements, Use Cases, Business Rules, Activity diagrams etc.
* Help with resource planning and work assignment for product development team

# Lease Process Support APIs

Construct web services APIs for third party partner tools enabling them to sell SunPower lease solar systems. APIs must provide functionality to initiate customer credit checks, create quotes and proposals, create contracts, e-sign contracts and send contract documents to partners

Responsibilities:

* Create technical and process flow diagrams to provide connectivity with other application interfaces. Defining the web services contracts for the applications
* Understand business processes and requirement; capture, analyze and document the development work breakdown tasks
* Studied product high level business description, data application documents and gathered detailed requirements for different iterations (agile sprints) of the product.
* Writing detailed design documents to meet the business requirements
* Coordinate with project team to prioritize product backlog and keep it up-to date
* Prepare sprint work break down tasks for the team and plan sprint user stories
* Implement the change management process suitable across all initiatives
* Create and manage project templates, use case project templates, requirement types and traceability relationships.
* Leading/mentoring the development team to achieve the sprint (and product) goals
* Monitoring and coordinating everyday product changes to ensure team meets the planned targets
* Participate in product demonstrations to the product manager and senior management

# Zoho CRM to Salesforce migration

Project to consolidate the 3 instances of CRM applications that company had collected through mergers, acquisitions, and the independent IT budgets of its subsidiaries. Data migrations and application upgrades were preparatory steps for the consolidation of CRM applications and their data, with integration connecting instances that could not be consolidated further. Achieving

application consolidation required considerable work in migrating, consolidating, upgrading, and integrating application data

Responsibilities:

* Define data model and maps of necessary data subjects from 3 CRM applications’ objects into Salesforce objects
* Revisit the existing profiles and Organization Wide Defaults. Setup new OWDs and Profiles based on security needs. Design page layouts and mapping of page layouts to profiles for all the record types.
* Identify data storage/space requirements. Work with the management to purchase additional space limits if needed
* Define ordering of data loads involving complex data relationships
* Plan the data migration. Communicate users about the cut-off date, and possible issues that may arise
* Plan sanity testing in sandboxes
* Evaluate if all the workflows and triggers of the impacted objects should be disabled before uploading data
* Create data backup and fallback plan

# Client: American Express, Phoenix Apr 2013 - July 2014 Development Project Lead

**Greenfield**

Greenfield involves building a CRM system integrating the existing J D Edwards financial system and an in- house transactional system, transforming the current manual systems to a more process oriented salesforce.com CRM system. Project is for one out of the three lines of businesses supported by the Amex Centre of Excellence for Salesforce.com catering to more than 5000 Enterprise user licenses. Solution has been implemented across three business regions which included US, Asia Pacific and Europe including set of allocations spread across 11 different orgs within the portfolio

Responsibilities:

* Act as an SME, for an Agile Team of developers and product owners, participating in JAD sessions
* Create process modeling & UI modeling diagrams
* Create complex process flow diagrams and flowcharts demonstrating business and system process flow
* Write change management and code migration process documentation
* Lead daily scrum/stand-up, sprint elaboration and retrospective meetings with the dev team
* Get approvals for various milestone documents to be SDLC complaint and maintain documents on project SharePoint
* Supplementary requirements modeling to focus on [business rules](http://www.agilemodeling.com/artifacts/businessRule.htm), [constraints](http://www.agilemodeling.com/artifacts/constraint.htm), [glossaries](http://www.agilemodeling.com/artifacts/glossary.htm)

# Merchant Force

Merchant Force is a sales process management application. Merchant Force invoicing tools support automated invoicing of the Fee based revenue products and applicable products in other lines of business of American Express. Invoicing tool on Merchant Force further assist in having standard invoice formats

Sales process starts with the leads uploaded into MF. Leads received from SET PMs (Supplier Enablement Team Project Managers & GCP (Global Corporate Payments) are daily uploaded into Merchant Force system and manually "converted" into Opportunities. Leads are converted for various commercial and consumer cards users and the application automates the product invoicing and sales process

Responsibilities:

* Design and develop of Salesforce.com implementation by understanding of best practices surrounding sales operations, marketing programs, lead flow management
* Estimate user story points, plan sprints and prepare release plan
* Work closely with various functional groups to understand and analyze business processes and requirements
* Analyze, documents and tests program development, logic, process flows and specifications
* Troubleshoot production issues, identify opportunities to streamline processes and gain efficiencies
* Participate in component, data analysis, and performance monitoring
* Keep scrum task-board up-to date, address bottlenecks by following a pragmatic approach
* Create and manage project templates, use case project templates, requirement types and traceability relationships.
* Document and established traceability between the Business requirements, Use Cases, Business Rules, Activity diagrams etc.

# Client: Hewlett Packard, Miramar Nov 2008 - Mar 2013 Technical Lead / Architect

**Contact Center - Five9 Integration and service console enablement**

Objective of this feature was to improve customer satisfaction by providing Partner and customer support agents with the right tools, information and processes to address customer inquiries quickly and accurately, creating a consistent and delightful customer experience

Key focus of the project was to Improve first call resolution, increase productivity and collaboration and hence resulting in improved NPS (Net promoter score). Several technology solutions including F9 integration and enablement of service console were implemented to achieve the business goals

Responsibilities:

* Work closely with the support team, business analysts and perform detailed analysis of

business and technical requirements. Designed the solution by customizing various standard objects of SalesForce.com (SFDC)

* Design and help deploy the Custom objects, Custom tabs, validation rules, Workflow Rules, Page layouts, to meet the needs of the business Team
* Plan sandbox refresh with Production Org data and configuration
* Prepared User Training documentation and provided the training to the internal business users to use the application and develop their own custom reports

# Seamless Enterprise Travel Manager (ETM)

ETM is a [travel and expense management](https://www.concur.co.uk/travel-expense) solution built with the powerful features of Salesforce It’s a service solution that helps produce [business intelligence reports](https://www.concur.co.uk/business-intelligence), run audits and help enterprises automatically reimburse travel related expenses.

It automatically integrate your [travel booking](https://www.concur.co.uk/travel-booking) details to pre-populate your claim, incorporate spend limits, based on your expense policy. Enables clients to quickly and easily attach images or [receipts](https://www.concur.co.uk/receipt-management) to your expense claim and enable managers to review and approve claims so travelers get [reimbursed quickly](https://www.concur.co.uk/expense-reimbursement). Clients can automatically import credit card charges, match them to receipts, itinerary data, and exclusive e-receipts from suppliers. Cash purchases can be easily added, receipts attached and the expense claims are ready to be submitted online or by smart phones

Responsibilities:

* Work with business teams to define expense approval processes and define using Salesforce
* Documenting current state (“as is”) and future state (“to be”) processes, systems flows, and data flows
* Vital techno functional resource in the full life cycle development
* Implementing and integrating third-party applications with SFDC and onboarding new clients
* Provide guidance for workflow template development and data filtering criteria
* Convert Business Requirements into Functional and Technical Requirements documents
* Acted as liaison between customer and technical solutions/support group to identify business processes, systems, and product requirements
* Work with product management and stakeholders to define product release plan
* Conduct work product reviews before production org loads
* Work with the support team for issues resolution
* Create a org structure and security model in tune with the organization
* Develop cases management to track and manage the customer issues as a part of the maintenance contract

# Client: TravelPort, Denver Dec 2004 - Oct 2008 Lead Developer

**Galileo NGGF (Next Generation Global Fares)**

NGGF is Airlines global fares and pricing system that powers all fares and pricing transactions for Travel Port’s Global distribution system. It delivers the inventories of airlines worldwide; including low-cost carriers providing access to millions of published and Web fares, real-time pricing and availability, and the latest shopping tools. It provides access to a full complement of automated fare types through a single source and ensures consistency in pricing across all transaction types. 360 Fares integrates into shopping and pricing displays for fast, easy comparison

Responsibilities:

* Study and understand the architecture of the system and solve the orbits (defects) from production
* Code and test enhancements/ change requests
* Resolve system performance issues, memory leaks/core dump issues
* Improve system performance to reduce the transaction run times. Analyzing system for scalability and performance enhancement changes/suggestions
* Work bi-weekly builds for performance impacts before production code load. Identify and report system issues impacting performance
* Develop support tools (exception handling and even reporting) for automatic server and application level alerts like memory dumps, message timeouts, hung servers, process/server status monitoring.
* Coded shell scripts for developer’s daily regression and Infrastructure team’s nightly regressions