**Balamanikanta Baratam**

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**Senior Business Intelligence Specialist - TABLEAU Platform**

A dynamic technocrat around 7.8 years of IT industry experience in software development in which 6.2 years of experience on Tableau (Tableau Desktop) and 1.6 years of experience on Data migration tools (DSP and Cransoft). Expertise in handling large data sets, insights generation, data interpretation, BI automation and advanced visualizations.

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| * BI Solution Design, Development * Self Service BI, Data Discovery and Data Visualization | * Dashboards and Reporting * Data Integration and ETL |
| * Data Analysis, Data & Dimensional Modeling | * Data Governance, User/Content Management |

**TOOLS & TECHNOLOGIES**



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| **Data Visualization & Data Discovery** | Tableau 8.x, 9.x, 10.x, 2018.x, 2019.x, 2020.1, SQL |
| **Reporting Tools** | Microsoft Office |
| **Data Integration & ETL** | Informatica, Data Stewardship Platform Tool, Alteryx, Dataiku |
| **Database** | Teradata, Microsoft SQL Server, Oracle |

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| **Industries –** Wealth Management, Energy, Oil and Gas, Health Care, Retail, Logistics  **Functional knowledge –** Procurement, Supply Chain, Risk, Reinvestment  **Job Roles –** Data Visualization – Manager, Subject Matter Expert, Technology Specialist, Consultant  **Development Methodologies –** Agile, Waterfall |

**KEY ACCOMPLISHMENTS**



* Successfully enabled Tableau as a technology and self-service data visualization for several clients of Tableau Software.
* Interacted with senior decision makers assisting them with Actionable Analytics using Tableau Software.
* Created dashboards in Retail, Health Care and Wealth Management domains.

**PROFESSIONAL EXPERIENCE**



**Designation (Data Visualization - Manager) – Morgan Stanley (20/08/2019 – Till Date)**

Morgan Stanley is a leading global financial services firm providing a wide range of investment banking, securities, investment management and wealth management services. We advise, originate, trade, manage and distribute capital for governments, institutions and individuals. As a market leader, the talent and passion of our people is critical to our success. Together, we share a common set of values rooted in integrity, excellence and strong team ethic. We provide you a superior foundation for building a professional career where you can learn, achieve and grow.

**Key Project 1:**

**Morgan Stanley (Aug 2019 to till date)**

**Role: Data Visualization - Manager**

**Description:**

Data Visualization team is tasked with providing insightful and actionable business intelligence solutions for various business unit under wealth management. Examples of essential data domains and metrics include Assets, Revenue, Account Demographics, Financial Advisor (FA) information, Securities and Cash Transactions, Risk, Stock Plan, Retirement, Financial Wellness and so on .The candidate may be assigned to a single visualization project or several projects. The role requires credibility, confidence and active participation with leadership teams, business units and technology groups across the project lifecycle. Specific assignments will depend on the size and complexity of the project

**Responsibilities:**

* Created dashboards on Retirement Data.
* Created dashboards on Stock Plan Data.
* Created dashboards on Financial Wellness Data.
* Created Mockups to meet the Business requirement in Tableau.
* Created Workbooks and dashboards for analyzing statistical data using Tableau.
* Provided PDF & CSV export options for individual sheets in every dashboard.
* Understanding the KPIs and Requirements Documents.
* Working with Data Warehouse teams and understanding Data Model.
* Designing and Developing reports using Tableau.
* Testing and validating the generated reports in collaboration with Business Users.
* Developed formatted, complex reusable formula reports and reports with advanced features such as conditional formatting, built-in/custom functions usage, multiple grouping reports in Tableau.
* Using groups, bins, hierarchies, sorts, sets and filters to create focused and effective visualizations.
* Worked with Trend Lines and Reference Lines to describe the data.
* Used Measure names and Measure Values fields to create visualizations with multiple measures and dimensions.
* Experience in writing SQL queries in Teradata.
* Working with Tableau Server Administrators to migrate to Tableau Server from Tableau Desktop.

**Significant Achievements**

* Automated excel export download capabilities by using extension API
* Automated Hyper refresh by using extract API
* Automated subscription of image/pdf via email to end users based on the data load refresh

**Designation (Technical Lead) – USEReady (26/03/2018 – 19/08/2019)**

USEReady is a Tableau Gold partner headquartered in NYC. USEReady was recognized as “Partner of the year” by Tableau Software. USEReady is also a Global Services alliance partner with Tableau and delivers several engagements on behalf of Tableau globally.

I’m currently working as Data Expert (ETL & Visualization) and responsible for Consulting, Solution Architecture, Development and Support of BI projects for USEReady’s clients.

**Key Project 2:**

**Morgan Stanley (Apr 2018 to Aug 2019)**

**Role: Tableau Consultant**

**Description:**

Morgan Stanley is a financial services corporation that, through its subsidiaries and affiliates, advises, and originates, trades, manages and distributes capital for governments, institutions and individuals. The company operates in three business segments: Institutional Securities, Wealth Management, and Investment Management.

**Responsibilities:**

* Created Risk Dashboard, Fixed Income Dashboard and Equity Dashboard
* Provided extensive support for Modern Wealth Management Dashboards.
* Worked independently for Business Manager Risk Dashboard.
* Created 6 dashboards for different types of Risk criteria.
* Created Mockups to meet the Business requirement in Tableau.
* Created Workbooks and dashboards for analyzing statistical data using Tableau.
* Provided PDF & CSV export options for individual sheets in every dashboard.
* Understanding the KPIs and Requirements Documents.
* Working with Data Warehouse teams and understanding Data Model.
* Designing and Developing reports using Tableau.
* Testing and validating the generated reports in collaboration with Business Users.
* Developed formatted, complex reusable formula reports and reports with advanced features such as conditional formatting, built-in/custom functions usage, multiple grouping reports in Tableau.
* Using groups, bins, hierarchies, sorts, sets and filters to create focused and effective visualizations.
* Worked with Trend Lines and Reference Lines to describe the data.
* Used Measure names and Measure Values fields to create visualizations with multiple measures and dimensions.
* Experience in writing SQL queries in Teradata.
* Working with Tableau Server Administrators to migrate to Tableau Server from Tableau Desktop.

**Designation (Associate Consultant) – Capgemini (11/07/2013-23/03/2018)**

Capgemini is a French multinational professional service and business consulting corporation headquartered in Paris, France. It provides IT services and is one of the world's largest IT consulting, outsourcing and professional services companies. Capgemini's regional operations include North and South America, Northern Europe & Asia Pacific and Central & Southern Europe. Services are delivered through four disciplines; Consulting, Technology, Outsourcing and Local Professional Services.

**Key Project 3:** **Mapco Express (Jul 2016 to Mar 2018)**

**Role:** Tableau Developer

**Environment:** Tableau Desktop (9.x, 10.1), Tableau Server, SQL and Excel

**Description:**

Mapco Express is one of the largest company-operated convenience store chains in the United States, and one of the leading C-store operators in the Southeast. MAPCO Express operates a chain of convenience stores in the Southeast United States. It offers products in food and beverages, snacks and pastries, cigarettes, general merchandise, energy, and other categories. The company was incorporated in 2001 and is based in Brentwood, Tennessee.

**Responsibilities:**

* Created Custom Hierarchies to meet the Business requirement in Tableau.
* Created Workbooks and dashboards for analyzing statistical data using Tableau.
* Developed formatted, complex reusable formula reports and reports with advanced features such as conditional formatting, built-in/custom functions usage, multiple grouping reports in Tableau.
* Representing data using the Cross Tabs, Geographic Maps, Pie Charts, Bar Charts and TreeMaps.
* Using groups, bins, hierarchies, sorts, sets and filters to create focused and effective visualizations.
* Experience in writing SQL Queries in SQL Server.
* Understanding the KPIs and Requirements Documents.
* Involved in Data Mapping and Detail Design Documents.
* Working with Data Warehouse teams and understanding Claims Data Mart and Policy Data Mart.
* Designing, Developing and testing reports using Tableau.
* Supporting User Acceptance Testing and validating the generated reports in collaboration with Business Users.

**Key Projects 4:** KCI, Systagenix Inc. (Jan 2015 to Jun 2016)

**Role:** Tableau Developer

**Environment:** Tableau Desktop (8.3,9.x), Tableau Server, SQL and Excel

**Description:**

Kinetic Concepts Inc. (KCI) is a leading global medical technology company innovating in developing new technologies, medicines and therapies designed to make wound healing more manageable for caregivers and more comfortable for patients around the world. In over 20 countries around the world, KCI is improving patient outcomes, lowering costs and delivering the advanced treatments necessary to heal wounds and better the lives of patients. KCI is devoted to advancing the science of healing and positively impacting patient care by developing customer-driven innovation to meet the evolving needs of healthcare professionals.

**Responsibilities:**

* Tableau development skill set including visualization development, use of parameters, and report optimization.
* Experience with designing complex dashboards taking advantage of all tableau functions including data blending, actions, parameters, etc.
* Developed Ad-Hoc reports and complex dashboards in Tableau as needed.
* Experienced in working on Tableau (Desktop, Server), creating Dashboards and Reports using different functionalities.
* Created a wide variety of analysis including comparisons, trending and finding customer loyalty.
* Proficient with Cross tab, Scatter Plots, Geographic Maps, Pie Charts and Bar Charts.
* Experienced in creating Calculations (Table Calculations, Hide Columns, Creating/Using Parameter, Totals) and Formatting (Annotations, Layout Containers, Mark Labels, Marks Card Changes, Rich Text Formatting) using Tableau Desktop.
* Proficient in designing and development of various dashboards, reports utilizing Tableau Visualizations like bar graphs, scatter plots, pie-charts, geographic visualization and other making use of actions, other local and global filters according to the end user requirement.
* Expertise in designing and creating various analytical reports and Dashboards to help users to identify critical KPIs and facilitate strategic planning in the organization.
* Published visualization to Tableau Server, include data extracts and schedule updates when publishing to Tableau Server.

**Key Project 5: GE Energy (July 2013 to Dec 2014)**

**Role:** BOA Team member; **Environment:** SQL Server 2008, DSP Tool

**Description:**

This project involves in migrating data from its Legacy system to SAP system. We are using Back Office Associate’s DSP tool to transform the legacy data to SAP ready format. Migration of legacy system to SAP using BackOffice DSP toolset (DSP Migrate, DSP Monitor, Assemble and Collect). Creating a Dashboard/Scorecard to provide visibility in current standing of project mapping and development.

**Responsibilities:**

* Handled the Master Objects such as Material and Routing.
* Handled the Transactional Objects such as Open Sales Orders and Open Production Orders.
* Extensive project development activities included: Designing, Mapping, Coding, testing and reviews.
* Creating conversion rules and Post validation reports for all master and transactional objects.
* Worked closely with the Onsite/Functional Team to discuss various ideas/solutions, issues and timelines
* Encouraged the identification and implementation of innovative ideas to yield cost/effort savings
* Participated in requirement gathering through various meetings and interactions with the Team as required.

**Significant Achievements**

* Responsible for devising the solution for different decision makers.
* Got the certification of recognition for deep Customer Satisfaction.

**EDUCATION**



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| **Year** | **Degree** | **Institution** |
| 2014-2016 | MS in Software Engineering | BITS, Pilani |
| 2008-2012 | B.Tech – ECE | GMRIT, JNTUK |

**TRAINING**



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| --- | --- |
| J2EE | Jul 2013 |
| Data Stewardship Platform Tool, Cransoft | Dec 2013 |
| Tableau | Dec 2014 |
| Azure Fundamentals | Mar 2020 |

**Certifications:**

https://www.youracclaim.com/users/balamanikanta-baratam

**LinkedIn Profile:**

https://www.linkedin.com/in/balamanikanta-baratam-9bbbb7152/

**Declaration:**

I hereby certify that all the information provided above is true to the best of my Knowledge.

Place: Mumbai, Maharashtra