**BHANU**

**Sr.Salesforce Business Analyst**

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**PROFESSIONAL SUMMARY**

Certified Salesforce Consultant with Over 8+ years of experience with extensive experience in business analysis, documentation, user story capturing, and requirement elicitation in Sales, Service, Financial, and Non-profit clouds. Proficient in implementing requirement elicitation using individual and group interviews, shadowing, and analyzing existing documents. Well-versed with stakeholder management, responsibility matrix, brainstorming, surveying, documentation analysis, and conducting different scrum events; a critical thinker and problem solver with strong analytical aptitude and expertise in design, planning, and implementing complex business solutions.

* Over eight years of experience in Salesforce Administration/Development and Business Analysis.
* Implemented business processes with standard record types, page layouts, validation rules, and dashboards.
* Experience in Administration, declarative development, Support management, API, and Integration.
* Experience in Salesforce Customization, Security Access, Workflow Approvals, Data Validation, data utilities, Analytics, sales, Marketing, Customer Service, and Support Administration.
* Experience in marketing cloud implementation worked with email studio and lead automation process.
* Experience creating custom objects and integrating existing desktop and web apps with legacy systems.
* Created page layouts and search layouts to organize fields, custom links, related lists, and other components on a record detail and edited pages.
* Implemented pick lists, dependent picklists, lookups, junction objects, master-detail relationships, validation, and formula fields to the custom objects.
* Experienced in working across various SFDC implementations covering Sales Cloud, Service Cloud, Marketing Cloud.
* Possess a comprehensive understanding of CRM business processes like Campaign Management, Lead Management, Account Management, Case Management, Quote, Forecasting, and Call Center.
* Extensive knowledge of the Salesforce.com implementation cycle in Sales, Service, and support modules.
* Skilled in customizing standard objects like Accounts, Contacts, Opportunities, Products, Price books, Cases, Leads, and Campaigns per client’s need.
* Expert in generating and analyzing custom reports and dashboards for management and various business unit personnel to provide detailed information on key performance indicators.
* Developed process enhancements through automation, Workflow, Approval Processes, and Escalation Rules.
* Experience in Salesforce Testing and Administration across all packaged software and SaaS application implementation facets.
* Excellent communication and interpersonal skills, accustomed to working in large and small teams.

**CERTIFICATIONS**

Salesforce Administrator – July 2020 (ADM 201)

Salesforce Advanced Administrator – June 2021 (ADM 211)

Salesforce Platform Developer I – August 2020 (PD 1)

Salesforce Sales Cloud Consultant – August 2020

Copado Fundamentals I & II – May 2023

Copado Certified Administrator – August 2020

Flosum Certified Administrator – September 2020

**TECHNICAL SKILLS**

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| --- | --- |
| Salesforce Tools | Apex, Visual Force, Process Builder, Dashboards, AppExchange, Force.com – Platform, Data Loader, and CICD pipelines. |
| Reporting Tools | Salesforce, PowerBI, Tableau, Birst, and SSRS. |
| ETL Tools | SSIS, Microsoft Import and Export Wizard, dataloader.io, and Change Sets. |
| Workflow Tools | Jira, Confluence, and Zendesk. |
| Environments | Salesforce Health Cloud, Non-Profit Cloud, Sales Cloud, Commerce Cloud, Service Cloud, Salesforce CPQ, and Lightning Web Components (LWC). |

**PROFESSIONAL EXPERIENCE**

**Client: Teladoc Health Inc. Jan 2023 to Present.**

**Role: Sr. Salesforce Business Analyst**

**Responsibilities:**

* Analyze the customer business requirements and ensure the release process is correct to move the development from one system to another.
* Responsible for Copado release management with deployments from version control using continuous integration, automated testing, and automated compliance audit.
* Documented the design and testing documents of the client’s requirements and created user stories and acceptance criteria based on the business requirements.
* Extensively worked on Service Cloud on Email to case etc.
* Analyze complex user requirements, procedures, and problems to improve existing system design.
* Enforce developers to follow best practices to align with Copado releases.
* Understand Business user requirements and conduct technical design reviews for a better solution.
* Divide the features and deliver the project in releases based on providing timely quality data.
* Work with Teladoc’s Development and TPM teams to address production bugs.
* Develop and enhance Teladoc's Reports and Dashboards
* Worked on service Cloud on Case Management. Build Reports based on products.
* Understanding the Business model and analyzing the existing Production design to understand the gap.
* Analyze the performance of existing reports using various tools.
* Configure salesforce and marketing cloud integration user along with configuration in salesforce.
* Configuring the Salesforce CPQ package, price, and product bundles and updating the price books regularly.
* Follow the client’s validation procedures to thoroughly test business functionality, analyze the business requirements, and design creative solutions.
* Integrated with Salesforce using Marketing Cloud connector, designed user-friendly data input screens, and developed functionality.
* Plan to train the new functionality and application to the functional and business teams.
* Maintain Salesforce org health and implement Salesforce release notes guidelines across the organization in Confluence.
* Implemented new customer support solution using Salesforce.com Service Cloud. Maintained and improved existing Sales Force implementation.
* Work with the Teladoc audit team and ensure due process is followed for production maintenance.
* Document the technical design documents and direct them to the remaining team members in the project through confluence.
* Follow the software development life cycle to gather requirements, analyze the user requirements, and plan the technical solution.
* Developed field & page layout customization for standard objects like accounts, contacts, and leads.
* Document the best practices when designing changes in existing systems for better operational efficiency.
* Followed customer’s quality assurance policies and tested all solutions accordingly.
* Design industry best practices to fetch data from databases with efficient optimization coding techniques.
* Documented the design specifications and coding techniques for application development staff and customers.

Client: Alameda County District Attorney's Office, Oakland, CA Jul 2019 to Jan2023

Role: Salesforce Business Analyst

Responsibilities:

* Conducting Requirement Gathering Sessions, identifying stakeholders, and creating a RACI matrix.
* Interacting with business teams as part of requirement elicitation and documenting the requirements.
* Creating the user stories and acceptance criteria based on the requirements.
* Configured Service Cloud to handle Case management, Email-to-case routing, and sharing settings in a queue-based model.
* Designing and developing Service Cloud Applications for Advanced Customer Service in Salesforce.
* Help Define/Groom User Stories for Service Cloud Implementation by collaborating with the Product Owner, End Users, and Development Team.
* Designed a salesforce service cloud console to enhance productivity with a dashboard-like interface.
* Assisted the business team with UAT, captured deviations, and recorded them on a bug tracker.
* Reviewing the test scripts performed by the QA team and validating against the requirements.
* Conducted GAP Analysis and enhanced business processes by integrating SOW validations and monitoring the project scope creep.
* Creating a project implementation plan based on the deliverables with expected milestone targets.
* Experienced in resource planning and budget allocation based on the project's scope.
* Preparing the sprint burn-down charts and comparing them with the product backlog to improve the implementation plan.
* Conducting different sprint events like sprint planning, daily stand-ups, sprint reviews, and sprint retrospectives.
* Implementing the change orders based on the scope creep from SOW and creating training documents, and conducting training sessions.
* Creating different documents like business requirement documentation, functional requirement documentation, process flow diagrams, and flow charts.
* Applied Agile and Scrum methodology for Salesforce custom app implementation.
* Implemented pick lists, dependent pick lists, lookups, master-detail relationships, validation, and formula fields to the custom objects.
* Worked on data deduplication and updates in the production sandbox to maintain data integrity.
* Designed and deployed custom tabs, validation rules, and auto-response rules to automate business logic.
* Salesforce Admin Cycle was implemented, which included Sales Cloud, Commerce Cloud, Service Cloud Marketing Cloud, Call Center, Chatter, and App-Exchange apps.
* Managed and developed Salesforce.com CRM solutions for multiple departments within the organization.
* Visualizing data insights and communicating findings to teams across the Organization.
* Designed, developed, and visualized the reports to the attorneys.

Client: Aruba Networks, Santa Clara, CA Jun 2018 to June 2019

Role: Salesforce Business Analyst

Responsibilities:

* Assisted in migrating the legacy CRM system to Salesforce, gathering the requirements, and integrating with front-end Applications.
* Worked as a liaison between the Core Team and the Data Team.
* Developing data mappings and integration patterns with the partner system.
* Creating and managing complicated workflow rules, data validation, and triggers in collaboration with management, strategic planning & analysis employees, and end-users.
* Planned and led business requirements elicitation sessions to gather functional and non-functional requirements for the client's Salesforce technology enhancements and projects.
* I held brainstorming meetings with the development team to get them more involved in the requirements-level analysis.
* Prepared a requirements management plan and business and functional requirement documents.
* To aid system understanding, I created data and process flow diagrams.
* Outlined the organization hierarchy and created profiles and roles accordingly in Salesforce; worked on visibility and security settings around them as required by the business.
* Configuring custom dashboards for various business groups based on their functionalities and needs.
* Created new custom objects, assigned fields, and designed page layouts, custom tabs, and components.
* Working with the development team to develop custom objects, fields, and standard object fields.
* Designed various types of email templates for auto-response to customers.
* Designed Custom tabs, Approval Processes, and Auto-Response Rules for automating business logic.
* Involved in system integration using Callouts, Triggers, and outbound messaging.
* Developed and published customized dynamic and complex Financial and sales reports/dashboards.
* Developed reports using Birst and PowerBI and visualized dashboards PowerBI.

Client: Restoration Hardware (RH), San Ramon, CA Nov 2016 to May 2018  
Role: Salesforce Business Analyst

Responsibilities:

* Performed detailed analysis of business and technical requirements and designed the solution by customizing various standard objects of Salesforce.com (SFDC) and other platform-based technologies like Visualforce, Force.com API, and Web Services.
* Involved in Salesforce.com Application Setup activities and customized the apps to match the business’s functional needs.
* Created user accounts and public groups and implemented role hierarchies, sharing rules, and record-level permissions to provide shared access among different users.
* Created search layouts to organize fields, custom links, related lists, and other components on a record detail and edit pages.
* Assisted in designing and creating training material and conducted internal training sessions on Salesforce technology functionalities for business users.
* Designed custom dashboards for various user groups based on their business functionalities and needs.
* Created and deployed several reports for different user profiles based on the organization's needs.
* Created workflow rules and defined related tasks, time-triggered tasks, email alerts, and filed updates to implement business logic.
* Set up automatic email notifications from Salesforce to directors on case updates and opportunities.
* Conducted brainstorming sessions with the development team to actively involve them during the requirements stage level analysis.
* Worked towards preparing a requirements management plan and business and functional requirement documents.
* Salesforce Admin Cycle was implemented, which included Sales Cloud, Commerce Cloud, Service Cloud Marketing Cloud, Call Center, Chatter, and App-Exchange apps.
* Used SOQL & SOSL with consideration to Governor Limits for data manipulation needs of the application.
* Created and customized Dashboards, Reports, and Report Folders for user profiles based on the organization's needs.
* Assisted with continuing Salesforce.com maintenance and administration, including data cleansing, custom objects, workflow, and campaign management.

**Client: Yatna Engineering Solutions, India Sep 2013 to May 2015**

**Role: Data Analyst**

**Responsibilities:**

* Worked on database capacity planning and space forecasting.
* Created tables and indexes and maintained Database Maintenance Plans.
* Created stored procedures for finding long-running queries, blocking sessions, archiving data from production to the archive server, and populating reporting data.
* Extensively used Joins and sub-queries for complex queries involving multiple tables from different databases.
* Migrated database from SQL Server 2008R2 to 2012 by using side-by-side migration.
* Created and modified stored procedures and T-SQL queries for efficient data retrieval and consumption in the systems and report generation in SQL Server 2008, 2012, and 2016.

**Education:** Master of Science in Electrical and Electronics Engineering in Texas A&M University 2016