# Name Rohit Joshi KP

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**Professional Summary:**

* Over **10+ years** of IT experience in the **Salesforce.com CRM** Platform both as **Administrator and Business Analyst**

involving requirements gathering, analysis, functional design, testing and implementation in Salesforce.com.

* Extensive Experience in **Profiles/Roles, Sharing Rules, Page Layouts, Email Services and Custom Objects**, **Relationships**, customized several **Validation Rules**, **tasks, Workflow Rules, Triggers, Apex classes, Reports and Dashboards** to achieve the complex business functionality.
* Proficiency in **SFDC Administrative tasks** like creating **Profiles, Roles**, Users, Page Layouts, **Reports,** Analytic Snapshots, **Dashboards**, Tasks and Events
* Expertise in **Salesforce.com** platform by designing the required entities like custom objects, creating the relationships/junction objects like **Master-Child, lookups, Entity Relationship data model, Roll-up summary, Pages, Classes and Interfaces**.
* Experienced in **Service Cloud, Sales cloud, Health Cloud** for All partner portal, customer portal.
* Experienced in Interacting with **Business Analysts** to design better test plan and strategies based on the requirements of the business.
* Experience in conducting **Requirement Gathering Sessions**, feasibility studies, Impact Analysis, Risk Analysis and organizing the software requirements in a structured way.
* Experience in analysing and documenting the workflows and functionality of existing systems, preparing presentation materials to all levels of management.
* Team player with good interpersonal skills, strong understanding of fundamental business processes, excellent Communication and Problem solving skills.

# Tools and Technologies:

JIRA, Confluence, Salesforce CRM, Lucid Chart/ Excel, Tableau, MS Office, Agile tools

**Professional Experience:**

**Client: T- Mobile**

**Location: Georgia**

# Duration: Jan 2021 – Present Role: Salesforce Business Analyst Responsibilities:

* Involved in various activities of the project, like information gathering, analyzing the information, documenting the functional and non-functional requirements.
* Configured the User permissions based on the organizational hierarchy.
* Created **custom objects, Visualforce pages, triggers, validation rules** by using **Apex** as per Customer requirement.
* Developed various **Tabs**, **Components** and **Visualforce Pages** and **Controllers**.
* Monitored and resolved the Service Requests, specifically, visibility issues involving Custom **Profiles, Public Groups, and Sharing Rules.**
* Designed & Deployed the **Custom objects, Custom tabs, Validation rules, Auto-Response Rules, Page layouts**, to suit to the needs of the application.
* Designed junction objects and implemented various advanced fields like **Picklist**, **Custom Formula Fields**, **Field Dependencies**, **Validation Rules, Work Flows**, **Security levels**, **Sharing rules and Approval Processes for automated alerts**, **field updates**, and Email generation according to application requirements.
* Worked on various Salesforce.com standard objects like **Accounts, Contacts, Leads, Opportunities, Reports and Dashboards.**

Developed and configured various **Custom Reports** and **Report Folders** for different user profiles based on the need in the organization.

* Managed customers with profiles, permission sets, roles, and sharing rules in **customer portal**.
* Defined **lookup and master-detail relationships** on the objects and created junction objects to establish connectivity among objects.
* Used field level security along with page layout to manage the visibility and accessibility of fields for different profiles.
* Review prototypes, solution blueprints, and project scope to ensure that the needs of the business are being met.
* Constant liaison between Business Unit and IT, translating the requirements to the IT and web production teams in building their HTML for the projects and clearing doubts between stakeholders.
* Prepared and presented **Business Requirement Document** (BRD), Functional Requirement Document (FRD) and involved in sign-off process including Use Cases and UML diagrams to derive consisting understanding.
* Performed **Gap Analysis** by gathering and analyzing business requirements from users to thoroughly evaluate the gap between the “AS IS” and “TO BE” process.
* Conduct Joint Application Development (JAD) sessions and interviewed Subject Matter Experts (SMEs), asking
* Facilitated **JAD** sessions with management, users and other stakeholders to define the project and to reduce the time frame required to complete deliverables.
* Designed and developed business flow diagrams, activity diagrams, sequence diagrams, Object Oriented models using MS Visio.

**Environment:** Salesforce.com, Custom Objects, Custom Tabs, Roles, Reports, Picklists, Accounts, Email Alerts, Gap Analysis, MS Project, MS Visio, and Windows.

# Client: Toyota

# Location: Michigan

**Duration: Feb 2018- Dec 2020**

# Role: Salesforce Business Analyst

**Responsibilities:**

* Gathered requirements from stakeholders and product team that gave a clear idea of the requirements to the development team.
* Involved in **Salesforce.com Application Setup activities** and customized the apps to match the functional needs of the organization.
* Maintained **user roles, security, profiles, and workflow rules** wherever necessary.
* Created custom reports and enhanced salesforce.com environment as per user needs using **Apex and Visualforce pages.**
* Designed the complete requirement to fit into the SFDC and created **BRD**, functional and technical document.
* Responsible for **analyzing the business needs** of Dell Inc to help identify business problems and propose solutions using different methodologies.
* Designed the complete process flow for the Credit Card Integration application.
* Designed Organizational **Hierarchy and roles** as per company need and set all the **profiles permission and their privileges**.
* Organized **Sharing group** for data access and security.
* **Performed reporting and dashboard** requirement for Sales, contracts and executives based on business requirement.
* Created workflow approval, validation rules and formulas with **Salesforce** administrative tasks and creating reports, modifying data etc.
* Worked with **validation rules, workflow rules, formula** and **complex validation** over multiple objects.
* Involved in the testing process to make sure all the functions are working correctly before deployment.
* Conducted demo and training to the user for the new application.

**Environment:** Apex, Visual Force (Pages, Component & Controllers), Pages, Data Loader, HTML, XML, Java Script, CSS, Workflow & Approvals, Reports, Custom Objects, Email Services, Sandbox data loading,

# Company: Target

**Duration : Nov 2016 - Jan 2018**

**Location: Georgia**

**Role: Salesforce Business Analyst Responsibilities:**

* Responsible for **Bug free** delivery of **Sales and Service Oriented applications** developed on (Salesforce.com)

**Force.com** Platform.

* Created Business Requirements Document and converted into System Requirement Specifications Document tying well with the design.
* Analyze existing interfacing systems and understand various technologies involved.
* Performed extensive **System Analysis** and **Gap Analysis** for the various business specifications.
* Responsible for maintain the Off Shore Teams and Onsite Teams.
* Develop Reports, Dashboards, and processes to continuously monitor data quality and integrity.
* Assist users with report design and management.
* Performed testing on Custom settings and email notifications and email-templates.
* Writing the test cases and performing tests on Triggers and Visualforce Pages developed on force.com platform.
* Assisted Project Manager in developing Scope/Vision Documentation and Project Plan, tracking project progress.
* Created Workflow Rules, Page Layouts, Approval Process, Tasks, Email Alerts, Field Updates and Outbound Messages to manage the Workflow & Approvals.
* Configured interfaces and portal application (PRM) for lead Management so that Assurant Lead Vendor agents.
* Configured PRM application for wholesalers Contact, Business Case and CPC functionality.
* Worked on various **Salesforce.com** standard objects like Accounts, Contacts, Leads, Campaigns, Opportunities, Quotes, Activities, Dashboards and Reports.
* Managed and scheduled project responsibilities through **MS Project.**
* Reviewed Project Charter, BRD **and FSD** to ensure all business requirements were documented.
* Prepared the test scripts and executed the testing for different implementations like, Web to Case, Web to Lead, Case escalation Process, Account management, Lead Management.
* Managed and scheduled project responsibilities through **MS Project.**
* Involved in the documentation of **Use and Test Cases** to test specific functionalities of the application.
* Organized and conducted **JAD sessions** to clarify business requirements.
* Facilitated discussions to anticipate future needs, requirements and opportunities.
* Assisted the Project Manager in preparing final presentation and training materials.

**Environment:** Reports, Custom Objects, Custom Tabs, Formula Fields, Data Loader, Gay Analysis, Reports and Dashboards, Workflow & Approvals, MS Visio, MS Project.

# Company: Dhasha Consulting Sep 2012- Oct 2016

# Location: Hyderabad

**Role: Business Analyst Responsibilities:**

* Gathered requirements for improving cash flow management by enabling the ability to send payments electronically, collect payments and move money across accounts
* Responsible for tracking and recording requirements for transferring money in and out of business and consumer accounts across financial institutions (**Dealing with B2B money transfer**)
* Supported the design of the payment gateway & reporting gateway.
* **Conducted data modelling** and **data mapping** for reporting data elements.
* Conducted user interviews, gathered, analyzed and documented business requirements in Rational Requisite Pro.
* Documented **Project Charter, BRD and FSD.**
* Developed **GAP Analysis** in **Microsoft Visio** to identify the **AS-IS and TO-BE situation**.
* Created Communication Matrix and participated in **Risk Analysis meetings**.
* Established **Work Breakdown Structure** and tracked progress of **major milestones** in **MS Project**
* Created **Entity Relationship Diagram** in **MS Visio.**
* Participated in **JAD sessions** with management, users, developers and other stakeholders.
* Performed **User Acceptance Testing (UAT)**.
* Assisted the Project Manager in setting realistic **project goals** and **expectations**.
* Conducted weekly **status meetings**.
* **Managed release calendar** to prioritize the **completion of major milestones.**

**Environment**, Windows XP, Agile Environment, Quality Centre.

**References:** Will be provided upon request.