



SUMITA ANAND

Riverside, CA 92508 | 951-403-1102 | suma_anand04@hotmail.com

Professional Summary

Passionate and pragmatic Salesforce Project Manager utilizing Salesforce experience to develop detail project plan, estimating work load, confirming LOEs and timelines with technical teams. Researching, implementing best practices for Salesforce.com application that meets business, project objectives and fulfills end-user requirements. Managed Salesforce Projects that included Sales and Service Cloud Implementations; Transitioning users from Classic to Lightning interface; Omni-Channel, Chat; salesforce communities for 300 + End Users. Worked on other IT projects that involved IT service improvements to core technology and applications used by organization such Peoplesoft HCM and Salesforce.

Skills

- Excellent communication, presentation and Analytical Skills.
- Experienced in multi-tasking operations, handling multiple projects related tasks and schedule.
- Strong project management skills, ability to work independently and report out as needed.
- Think outside the box! Be resourceful on what's available and make the best of it.
- Agile, Hybrid Waterfall Project Management.
- Salesforce Trailhead: Lightning Experience Specialist & Service Cloud Super badges

Work History

Salesforce Project Manager/Scrum Master/JIRA Test Lead

Feb 2015 - Current

UNIVERSITY OF CALIFORNIA (OFFICE OF THE PRESIDENT)

Riverside, CA

- Using Waterfall, Agile (both Scrum & Kanban) Methodologies to lead, support Sales force Service Cloud implementation in a call center environment that included initial implementation of case management system, related enhancements, Salesforce Communities and Integration of People Soft HCM personal and job data to Salesforce Contacts table related to Cases Object.
- Perform Salesforce configuration – create fields; record types and page layouts; test design responsible for leading business needs analysis efforts, facilitating elicitation sessions, business process identification, developing requirements documents and Project Charter.
- Work with business & technical resources to manage detailed business requirements, collection of comprehensive functional requirements documents, use cases, test conditions, test scripts, and training documentation to support the successful implementation of initiatives and processes.
- Facilitate design sessions between IT Technical Team and Business/SMEs or Vendor/External Consultants that were involved based on each project and document as needed.
- Work with business to identify areas requiring decisions/clarity to define project scope and objectives/requirements. Partner with business teams and/or IT Applications staff to design and deploy solution design changes to applications functionality and processes to meet changing strategic/operational needs.
- Oversee the configuration of Salesforce Service Cloud to meet approved solution designs with both Internal Team (Salesforce Admin and Technical Supervisor) and External Vendors and their resources.
- Using Agile Delivery Approach, manage project deliverables from multiple teams both onsite and offsite, multiple task list, holding weekly status meetings and assigning priorities on the weekly basis for initiatives.
- Maintain Scrum & Kanban Board in JIRA for Salesforce Operational Items and initiatives with defined Sprint length.
- Work with Business Test Leads to manage all application test cycles, from end to end with relevant IT and Business participants. Manage UAT with end users including coordination and user acceptance signoff.
- Overall project planning, handling Project timelines, Core Team meetings, Tracking/resolve open issues, Resourcing (with Core Team and Business), Status updates, Oversee master project and related sub-projects with different teams both onsite and remote and offshore.

Key Projects using Waterfall, Agile (Scrum) and Agile Hybrid Methodologies:

- Initial Implementation of Case Management System (Service Cloud) for UCPath Business Units. Involved Peoplesoft Integration with Salesforce Contacts table via web service.
- Case Management System – Process Improvements.
- Salesforce Communities to provide employees self-service functionality.
- Customer Satisfaction Survey Project.
- Quality Incident Management System.
- Open Enrollment 2019 Support on open portal - Drupal.
- Salesforce Omni Channel Implementation.
- Salesforce Live Agent Chat.
- Rollout Lightning Experience for 300+ users.
- Enhanced existing SLAs for Business and Impact on UCPath customers.
- Several PeopleSoft projects related to Benefits & Payroll Modules; Rewrite Design of Benefits Eligibility program & OnCycle OffCycle programs.
- Request Callback by Appointment using Lightning Scheduler

Salesforce Project Manager/Analyst

Jun 2014 - Feb 2015

ENTERTAINMENT PARTNERS

BURBANK, CA

- Using Agile Scrum methodology managed Salesforce implementation and deliverables of the service cloud project based on a set budget, scope and timeline.
- Creating and managing the work breakdown structure (WBS) and schedule project plan, managing the resources both internally (including 1 CRM Administrator, 1 Data Analyst and 1 Sales force Administrator) and externally which included working with Vendor to implement Sales force.
- Regularly interacting with management and co-coordinating, directing the activities to all project team members.
- Responsible for providing the stakeholders with weekly status reports, presenting updates in Steering Committee Meeting and making sure all deadlines are met.
- Executing business process review meetings and discovery sessions with Stakeholders , Setting up and configuring, optimizing Salesforce solutions
- Providing guidance and support to MSCRM Administrator on Hands on Design and Configuration in Salesforce that may involve - creating user profiles, changing page layouts, building formula fields validation fields for data integrity and management.
- Providing best practices related to Governance for the entire org and for the cross functional teams. Identifying the integration points in Salesforce that maybe used for future integrations to other apps within org.

Project Manager/Business Analyst

Feb 2014 - Jun 2014

ALLERGAN

IRVINE, CA

- Working with the overall Project Leader and the Phase 1 Technical Project Lead for design review and UAT sessions.
- Responsibilities include gathering for translating high-level business requirements into functional specifications and managing requests for changes to the specifications.
- Using Salesforce experience to develop accurate work estimates and timelines.
- Getting consensus between different Business groups responsible for project deliverables.
- Escalating issues to Project Leader and SCM for further actions as needed.

Master Data Analyst/ Salesforce Project Manager

Mar 2013 - Feb 2014

DECISIONPOINT

Irvine, CA

- Following the Agile Methodology for this project, conducted Assessment of the current Project which already had an integrated app called - ZUORA, designed a Strategy and road map to achieve the Quoting piece within SFDC that meet end goals for the Sales Team. Completed the entire Project Implementation within given time frame and budget and provided a Sales Team the Quoting App that was built in-house, without any integrated app. Wearing several hats; also responsible to Design & Re-Engineering the business processes within the organization between the Sales Admin Team and Sales Team. Implemented Chatter as a part of *Quote to Cash* Project where the workflows were designed between Sales and Sales Administrators to share information related to Opportunity, Products and Quote. Created Chatter Group for Sales based on the territory and product expertise where the information was shared between the users that helped closing deals faster.
- As a Project Manager, managed resources such as Subject Matter Expert (Internal Employees) and 3rd party Developers, created project timelines, creating project plan based on business and technical requirements. Working with these Resources to design the project plan and getting the work done under given budget and timeline.

- Successfully partner with internal Sales Team to understand their business with their customers, Identified the areas of improvement in the business processes to improve Sales efficiency. Oversee the work performed by Independent Consultant (3rd Party) on the Project related to Quote To Cash, Discussing Design Details and performed all testings to meet the end goals for the Sales Team.

Sr. Business Systems Analyst/Project Manager

Jun 2011 - Mar 2013

QLOGIC

Aliso Viejo, CA

- Using Agile Methodology providing design and execution of sales force.com configuration changes to Internal Teams. In Turn, gained a better appreciation of how requested changes are prioritized, while being more "agile" in its ability to change focus. Performing testing, implementation, documentation and updating as it relates to the Sales Force.com software and system administration.
- Solving problems and trouble shoot sales force.com setup from both operational and technical perspectives and providing world-class customer service throughout project implementation lifecycle.
- Worked with at least 4 major Sales force Implementations that involved integrating third party data into Sales force, integrating third party app into Sales force as LEADS and then converting into Opportunities, integrating Data.com into Sales force and training the Marketing Team to manage the app, performed a details analysis of the existing data that involved – DE Duping, Data Cleansing, Data Restructure (based on the regions and State), Re-Assessment of the User Profiles and re-designing.
- Worked with external Sales force Partners like Apprio to perform customizations on the Service Cloud that involved Triggers and Visual force, designed process on the way data is coming into sales force.com. Converted the functional requirements into more technical requirements before handing it off to the development Team.

Education

Certificate: Project Management Program:

Covering, A Guide to the Project Management Body of Knowledge (PMBOK® Guide)

Dec 2020

University of California

Irvine, CA (Extension)

Certificate: Agile Project Management Program

May 2016

University of California

Irvine, CA (Extension)

Certificate: Business Analysis

May 2012

University of California

Irvine, CA (Extension)

Diploma in Programming Languages – Computer Science

June 1996

APTECH – Technical School

New Delhi, India

High School Diploma, Marketing & Commerce

June 1994

Fr, Agnel School

New Delhi, India

Additional Skills

Salesforce Features; Data tools:

- Workflow rules, Approval processes, flows, email templates, custom processes.
- Using Demand Tools - Data Migration, Data Cleansing, System Security, User Administration and analytics.

Sales Cloud and Service Cloud Implementation/Customization:

- Workflow Rules & Approval Processes, Validation Rules, Custom Objects, Security Controls, Analytics, Reports and Dashboards, Sales & Support Processes

External User Integration:

- Web-to-Lead, Web-to-Case, Campaigns, Salesforce-to-Salesforce

Project Management Tools & Methodologies:

- MS Project 2016, SharePoint and JIRA.
- Agile Waterfall Hybrid Methodology, follow templates and processes to execute projects.
- Agile Methodology – Working knowledge of creating user stories and managing product backlog, leading scrum sessions. Utilizing Rally / CAAC to manage user stories, estimation for each deliverable.
- TntJIRA to document user stories, tracking test scripts and UAT along with business test leads.
- Scrum and Kanban boards in JIRA and also creating Project Plan using MS Project Schedule.