



## Phalguni S.

Salesforce Business Analyst/ Administrator

Phone: 804-615-5527 Email: Phalguni.sfdc@gmail.com

### Professional Summary

- SFDC CRM consultant with over 7 years of IT experience in Business Analysis, Design, Development, Testing and Administration spanning all facets of package software and system integration.
- Business analysis expertise includes: Requirements gathering (using JAD sessions and conducting User Interviews); creating business deliverables like Business Requirement Document (BRD), Software Requirements Specifications (SRS), functional and non-functional requirements documents; business process analysis; use case modeling and analysis; gap analysis and risk mitigation.
- Experience with different SDLC processes - Agile and waterfall.
- Experience in the CRM space including Business Analysis, Administration, Configuration, and Implementation with SFDC.
- In depth understanding of CRM business processes like Lead Management, Account Management, Case Management, Opportunity Management.
- Experience transforming Salesforce classic UI to Salesforce lightning UI using open source aura network & lighting component.
- Experienced in Discovery, Scoping, Analysis and Implementation Phase for various SFDC projects
- Experience in facilitation of Joint Application Development (JAD) sessions with end user, expert team, business intelligence team, SME'S, QA team, Walk Through and Signoff with stakeholders
- Extensive experience of capturing and analyzing business requirements and implementing entity relationships and converting to Salesforce custom objects, lookup relationships, junction objects, master-detail relationships.
- Extensive experience of using declarative features Formula Fields, Field Dependencies, Validation Rules, Work Flows, and Approval Processes for automated alerts, field updates, and Email generation according to application requirements..
- Experience in implementing Web-to-lead, Web-to-case, and Email-to-case functionality
- Hands-on experience in implementing sharing model, sharing rules, and manual sharing via roles, profiles hierarchies, permission sets and groups extensively. Each user case was analyzed and best solution was implemented.
- Experienced in performing data migration from Legacy Systems.
- Installed Salesforce Apps, configured and maintained user security permissions in compliance with organizational needs.
- Experienced in managing cross-functional projects including project management activities such as Resource & Task Planning and Project Tracking.
- Documented As-Is business processes and proposed To-Be models for process re-engineering initiatives.
- Excellent Troubleshooting and problem solving skills with a focus on timely handling issues.
- Excellent verbal and written communication skills and the ability to interact professionally with a diverse group, executives, managers, and subject matter experts.
- Participated in development of Business Cases with activities including Proof-of-Concept creation to support enterprise wide strategic initiatives.

### Skill set:

Salesforce Technologies

Salesforce.com, Customer Portal, Workflow & Approvals, Reports & Dashboards, Custom Objects, Einstein Analytics



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Project Management Tools	MS Project, MS Visio, MS Excel, JIRA
Tools & Apps Worked on	Force.com Apex Data Loader, Informatica , Workbench, Avention, Apttus CPQ , Marketo , Scribe
Databases	MS SQL

### Education

- Masters in Business Finance, Virginia Commonwealth University, Richmond, VA, June 2013
- Masters in Business Administration, Christ University, Bengaluru, India, July 2012
- Bachelors in Commerce, Delhi University, Delhi, India, July 2010

### Certification

- Salesforce.com Certified Administration (201)

### PROFESSIONAL EXPERIENCE:

Client: American Red Cross  
– Fairfield, NJ

Sept 2018 – Till Date

Role: Salesforce Business Analyst/Admin

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- Partnered with the business groups to support and ensure delivery of applications and align with business and IT strategy.
- Worked with cross functional business stakeholders to write and refine the user story. Discussing business workflow to define the problem and acceptance criteria for development team.
- Worked on vendor management responsibilities with in-depth hands-on technical expertise
- Applied technical expertise and business analysis concepts to identify, evaluate and define complex systems scope and objectives with an understanding of applicable business practices, processes, systems and industry standards to meet end-user needs.
- Used Einstein Analytics to quickly create reports and charts from external dataset that helped the sensitive customer information private.
- Effectively used Einstein Analytics to analysis large data sets and using the BI to recognize the key events.
- Worked in a highly agile development environment.
- Multi-tasked as a traditional business analyst and UAT Lead.
- Prepared test specifications, documenting testing artifacts
- Supported UAT through collaboration between technology and UAT users



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- Collaborate with QA and the Development teams to ensure the test plans are accurate and well-designed within an Agile framework.
- Guiding the service center agents on resolving the post go-live user tickets.

Client: National Financial Partners  
– Austin, Texas

June 2015 – Sept 2018

Role: Salesforce Business Analyst

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- Modified Business Requirement Document, identified process repetitions, bottlenecks and infrequent routes
- Created Environment setup plan, Migration document and checklist
- Planned testing strategy, created and signed off test-script, executed User Acceptance Test
- Created new custom objects, assigned fields, designed page layouts, custom tabs and components.
- Configured out of the box reports and dashboards as well as custom reports.
- Utilized Einstein Analytics for report creation from flat files and external data sets of sales data.
- Einstein Analytics was used to visualize the data which made the data easier to understand. Sales and marketing team utilized these to target customers more efficiently.
- Planned and conducted requirements gathering meetings with the business to collect functional and non-functional requirements relating to client's Salesforce technology needs.
- Created data flow diagrams and process flow diagrams to facilitate better system understanding.
- Designed various types of email templates for auto response to customers.
- Prepare training material and provide in person training, and also training via web conferencing
- Serve as liaison between customers and team developers to overcome applications issues and maintain established business relationships
- Worked on data migration from legacy system to Salesforce. Standardizing the data based on the Salesforce system to minimize the data loss during migration.
- Directly working with the users to identifying the key data point and documenting the process.

Client: Bloomberg  
– New York, NY

December 2014 – May 2015

Role: Salesforce Business Analyst

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### Responsibilities:

- Experience with supporting Service Cloud.
- The Case Management process was migrated from Oracle to Salesforce.



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- Actively involved in business process analysis for Case Management and flow of case to different tiers.
- Worked on various standard objects like, Assets, Entitlements, Service contracts, Accounts, Contacts, Cases.
- Customer portal access to customers to create and manage cases.
- SLA process for case management has been implemented using Entitlement process and Case Milestones.
- Hands on experience in manual testing.
- Active involvement in System Integration testing and Functional testing.
- Designed and developed Custom objects, Workflow Rules, Validation Rules, Approval System, Formula fields, Field level Security for Profiles.
- Moved code between different instances.
- Experienced in providing Access and Permissions for Profiles and Users.
- Experience in Onsite-Offshore coordination.
- Coordinated with development/configuration and testing teams during development and testing phases of the project. Liaison between IT and business teams to help clarify questions and requirements.
- Provided assistance in User Acceptance testing.
- Issue (Defects) Management and Tracking. Status Reporting and Tracking. Coordinating between teams for the defect fix and testing.
- Provided Post-implementation Support and end-user Training.

Client: Yale University  
– New Haven, CT

July 2013 – November 2014

Role: Salesforce Business Analyst

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### Responsibilities:

- Experience with Sales and Service Cloud.
- Worked in setting up service cloud console, help desk and providing multi-channel support to the customer.
- Configured Salesforce Knowledge with service cloud.
- Worked with multiple departments to understand complex business processes, and configure applications and systems into efficient technical solutions.
- Captured input, business rules from business users through JAD/Requirement gathering sessions and defined scope of the project.
- Created Functional Requirement Document and Software Requirement Specifications for the design solutions based on the requirement.
- Created Test case documents based on use cases for Integration testing and UAT.
- Actively involved in business process analysis for Case Management, Opportunity Management, Product Management, Quote Management, and Ordering Process.
- Implemented escalation rules, automatic case generation and their escalation to call center representative, and generated email alerts for quick issue resolution.
- Addressed processing of incoming service e-mail requests from customers to automatically create new case records.
- Defined Assignment rules to enable proper routing of cases to the case team members.



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- Defined Escalation rules to route the case, in case of SLA violation.
- Salesforce CRM was integrated with Powerstrip application for Quoting and Order processing.
- TIBCO was the middleware application integrating between Salesforce and Powerstrip.
- Hands on experience in creating and setting up the Outbound messages.
- Created the integration document and co-ordinated with Powerstrip and TIBCO team, with details of tables and fields for the data synchronization.
- Involved in Migration plan, Deployment plan and documenting it.
- Hands on experience in manual testing.
- Active involvement in System Integration testing.
- Provided assistance in User Acceptance testing and gathering feedback and providing the same to the development team.
- Worked on various SFDC standard objects like Accounts, Contacts, Opportunities, Opportunity Products, Products and Reports.
- Created new custom objects, assigned fields, designed page layouts, custom tabs.
- Designed and developed Workflow Rules, Validation Rules, Formula fields, Field level Security for various CRM as per the requirements.
- Setting up the SFDC community, creating profiles and assigning them to community users.
- Actively involved in deploying the deliverables from development to test environments and worked on data extract and loading for data migration.
- Provided assistance in analyzing and fixing the post-production issues.
- Created documents for End-User Training.