Somashekara Swathi
Location: Cumming, GA

Professional Summary

Highly seasoned and accomplished Certified Salesforce Consultant with a strong record of client satisfaction. Capable Salesforce Consultant with proven history of enhancing sales and back-office operations. Proficient in best practices, leadership strategies and employee motivation to boost productivity and job performance. Well-coordinated in addressing problems, investigating root causes, and implementing successful resolutions. Detailed Salesforce Administrator with 13 years of experience administering complex Salesforce software solutions for sales and marketing management and development. Thoughtful software troubleshooter with generational software update and integration experience. Collaborative administrator supporting personnel in long-term data management and storage. Dedicated and results driven Veeva CRM Specialist with 2 years of experience in implementing, customizing, and optimizing Veeva CRM solutions for pharmaceutical companies. Proven track record of increasing efficiency, enhancing user experience, and driving sales growth through Veeva CRM. Seeking an opportunity to contribute my expertise to a dynamic organization.

Technical Skills

- **SFDC Administration and Configuration:** Accounts, Contacts, Campaigns, Leads Opportunities, Contracts, Cases, Solutions, Queues, Quotes. Managing who sees what profiles, OWD, Role hierarchy, Permission sets, Field level Security, sharing rules and Manual sharing field creation, page layouts, Record types, workflow, and Approval Process. Leads and case assignment rules, Auto response rules, Reports and Dashboards. Email and Document templates, Data Migration, Apex Data loader, workbench, Lightning implementations.
- **Salesforce CPQ:** Build CPQ Quoting and Product Configuration, Validation rules, pricing, configurator, guided selling, Advanced approvals, Document templates, quote templates, Price rules, sales cycle, Discount schedules, CLM.
- **Salesforce Development:** Create and manage workflow rules, Data validations, Flows, Triggers, create and Manage custom Objects, fields, custom formulas, Validation rules and clear understanding and debugging the Apex classes.
- **Business System Analyst Skills:** Problem Solving, Critical thinking, Documentation and Specification, workflow diagrams, use case diagrams, change management, Business Process Modeling, Data Modeling, Requirement Gathering, Requirement Prioritization, User stories, Sprint planning, Client Interaction, Team coordination, UAT, Test cases, Acceptance criteria, Jira stories grooming. Handling QA team and offshore.

Core Qualifications

JIRA	Testing and Deployment
Veeva	Training & Development
Conga	Marketing cloud Modules
CLM	Cetina Professional Service Automation tool
Sales cloud	High oral and written communication skills.
Service Cloud	Integrated App Exchange tools with Salesforce
Data migration	applications.
Agile Methodology	Ability to integrate various business processes across
Production support	different systems.
Project Management	

Certifications:

Salesforce.com Admin (Adm201)	Service Cloud Consultant-License 790032
Salesforce.com Developer (Dev401)	Salesforce.com Advance Administrator (ADM 211)
Salesforce Platform Developer 1	Sales cloud consultant
Salesforce Certified Platform App Builder	Veeva Certified
Salesforce Certified Community Cloud Consultant	Certified ScrumMaster® ID: 001578498

Professional Experience

Client: ForgeRock - Remote (SFO Headquarters)   **Oct 2021 – Present**
Role: Sr Business Systems Manager
Responsibilities:

- Led cross-functional teams to gather and document business requirements, resulting in a reduction in project delivery time.
- Design CPQ Quoting, Product Configuration. FR has a large family of products and price books with many dependent components. Business wants to improve the user experience, simplify the quoting process, and help the sales team with guided selling and product configuration.
- Implemented many changes where Deal cycle has improved tremendously like modifying Approvals, helping Deal Desk Team to have better Quote UI, Simplifying Order forms.
- Administer and maintain the Certinia PSA platform, including user management, security settings, and data integrity.
- Collaborate with Professional Services stakeholders to understand their needs and requirements and implement customizations accordingly.
- Develop and manage custom objects, workflows, and validation rules to enhance the Certinia PSA functionalities.
- Assist in the integration of Certinia PSA with other systems, ensuring seamless data flow.
- Create and maintain reports and dashboards to provide actionable insights to stakeholders.
- Troubleshoot and resolve issues related to PSA tool configurations and functionalities.
- Keep abreast of PSA updates and enhancements and recommend best practices to optimize system performance.
- Provide training and support to end-users, ensuring they can effectively utilize PSA in their daily tasks.
- Work with Administrators and cross-functional teams to address complex technical challenges.
- Collaborate with Developers and support in implementing new features and functionalities.
- Collaborated with stakeholders to define scope, objectives, and success criteria for various projects.
- Implemented data visualization tools to create dashboards and reports for improved data-driven decision-making.
- Collaborated with product owners to define user stories and acceptance criteria for software development projects, leading to an increase in project efficiency.
- Worked closely with the IT team to identify system enhancements and resolve issues, ensuring optimal system performance.
- Prepared and delivered regular reports and presentations to senior management, summarizing key findings and recommendations.
- Recommend improvements to existing systems and processes, Create Test Plans, Conduct UAT, provide end-user support as needed.
- Constantly in touch with QA Team and UAT Team to get updates regarding the Sprint Stories testing.
- Delivered multiple high important projects like Professional Services Automation and Contract Life cycle management.
- Coordinate end-user support across all junior solution providers.
- Monitoring Production support tickets and Quarter end support issues.
- As a Salesforce CPQ Specialist, I was responsible for configuring a variety of CPQ functionalities like bundle configuration, product rules, option constraints, price rules, discount schedules and Quote management, product management Globally.
- Involved in analyzing existing systems to identify gaps and provide solutions to bridge them.
- Worked with Marketing teams on setting up Ring lead, Third Party applications for Lead Generation, customizing lead object by creating custom formula fields to calculate lead scoring, Automating lead assignment and Owner regions.
- Have worked with the team on development of CRM solutions using Standard/Custom objects, Workflows, Process builders, Flow, Validation rules, Apex classes & triggers etc.
- Collaborated with cross-functional teams to develop and execute product strategies, including market research, competitor analysis, and user feedback.
- Created and maintained product roadmaps, ensuring alignment with business goals and customer needs.

- Conducted user interviews and surveys to gather insights and identify pain points, leading to product improvements.
- Worked closely with designers to create user-friendly and visually appealing product interfaces.
- Developed and communicated product requirements, user stories, and acceptance criteria to development teams.
- Coordinated product launches, including marketing campaigns, sales training, and customer support strategies.
- Conducted post-launch analysis to gather feedback and measure product success, implementing improvements as needed.

Client: Harvard Business School - Boston, MA   **Oct 2015 – Oct 2021**
Role: Sr IT Salesforce Administrator
Responsibilities:
- Worked with developers, project managers and others to help ensure high quality and timely software delivery on multiple implementation projects of varying sizes and complexities.
- Implemented Pick lists, dependent pick list, lookup, junction objects, master detail relationships, formula fields to custom objects.
- Worked with advanced approval rules, approval conditions, variables to match business requirements.
- Reviewed and analyzed the effectiveness and efficiency of existing systems and developed strategies for improving the application under test.
- Built and maintained dashboards focused on pipeline, bookings, risk, account performance and Sales Rep performance.
- Provided Production support for Sales rep team. Performing ongoing Sandbox refresh after monthly releases.
- Provided day-to-day end user support and assisted users with best practices to improve and increase Salesforce knowledge.
- Utilized JIRA, to track assigned tickets and triage the bugs for monthly product releases.
- Performed testing and customization of objects, fields, record types, page layouts, workflow, and validation rules in salesforce.
- Provided support to end users to resolve issues with salesforce and related applications & conducted weekly demos of new functionality for business stakeholders.
- Analyzed key performance indicators to measure sales productivity and prepared reporting packages on monthly and quarterly results to executive management.
- Reviewed internal systems and organized training plans to address areas in need of improvement.
- As part of my development plan learned and got trained with native Salesforce quote to cash functionality such as Opportunities, Product configurations, Product rules, Price rules, Quotes, Orders and contracts, Lead-to-Cash business processes.
- Trained in Coordinated with Legal, Business Operations, Orders and Finance teams to execute customer engagements and process purchase orders.
- As part of my Career development plan learned and got trained Professional services Automation tool to serve Professional services team in any product-based company.

Cognizant Technology Solutions
Client: Salesforce – Des Moines, IA   **Oct 2012- Dec 2013**
Role: Salesforce Trainer/ Salesforce Manager
Responsibilities:
- Served as liaison between business and technology department, enhance communication lines between executives, managers, peers.
- Worked on the designing of custom objects, fields, role-based page layouts, custom reports, report folders, report extractions to various formats, Dashboards, and various other components as per the business requirements.
- Duties included Process documentation, Solution Design, Field/Object/Process flows creations, third party Applications, Support and Sales process implementation.

- Added new custom objects, assigned fields, designed page layouts, custom tabs, components, custom reports & dashboards.
- Continuously identified and implemented CRM business process improvements and changes, in close coordination with IT, including third party add-on solutions or other connected software applications.
- Created various Reports and Dashboard to assist Sales manager.
- Analyzed the changes performed in CRM application for the Operations Department, translated them to business and functional requirements for Service Cloud in SFDC
- Created and maintained User Stories by interviewing the business users to communicate the requirements to development and testing teams.
- Responsible for documenting user stories, business rules and workflow diagrams for the operations functionality
- Reviewed Test case, Test data and Test Scenario to make sure testing should perform properly.
- Closely monitored the Testing, Facilitated UAT Sessions & worked on defect life cycle using JIRA.
- Actively participated in Postproduction Validation (PPV) and handled issues appropriately
- Facilitated daily stand ups (Internal and Contractors), sprint planning, Sprint review, backlog grooming, Sprint Demos and post deployment validation meetings between the business and the technical team.
- Acted as a liaison between the main developers and the Business Users resulting in a 90% success rate in new feature enhancements and 70% reduction in bugs that required hot fixes.
- Collaborated with the different departments to create a process that enabled communication to all teams prior to making any enhancements to avoid conflicts once the enhancements were deployed to production.
- Created sequence diagrams and use case specifications to facilitate the developers and stakeholders in understanding business process during the installation and integration of several applications.
- Created various Lightning Apps using Lightning App Builder and Lightning Design System. As per business user request, we have implemented Lightning Web Tabs to reduce the number of clicks and navigation.
- Created reports and dashboards in Salesforce to assist all teams across the company to track performance, revenue and projections.
- As part of the training project, I trained 100 internal employees and users and got their Salesforce Administrator certification.

Client: Johnson & Johnson - Trenton ,NJ   **Jan 2014- Oct 2015**
Role: Manager- Projects
Responsibilities:
- Led the successful implementation of Veeva CRM for [Client/Project], resulting in sales productivity and a boost in user adoption.
- Define business and functional application requirements to integrate into Veeva CRM.
- Organize and facilitate internal team and client-facing meetings.
- Manage and mitigate project issues and risks.
- Collaborate with Data Warehouse and Testing and Validation teams.
- Worked on BRDs and TRD's Documentation for all the sprint related changes.
- Collaborated with cross-functional teams to gather business requirements, design custom solutions, and configure Veeva CRM to meet specific client needs.
- Conducted user training sessions and created comprehensive user documentation, leading to a reduction in support requests.
- Acted as the primary point of contact between the client and the development team, ensuring seamless communication and project delivery.
- Implemented advanced reporting and analytics in Veeva CRM, enabling data-driven decision-making and improving marketing campaign effectiveness.
- Managed ongoing system maintenance, updates, and troubleshooting, resulting in a decrease in system downtime.
- Administered and maintained Veeva CRM, including user access, data integrity, and security settings, resulting in a reduction in data errors.
- Worked closely with sales and marketing teams to design and execute email marketing campaigns within Veeva CRM, leading to a increase in lead generation.

- Implemented automation workflows and business rules to streamline processes, reducing manual data entry.
- Created and maintained custom reports and dashboards for sales and marketing teams, providing real-time insights into customer interactions and sales performance.
- Conducted regular system audits to ensure compliance with industry regulations and best practices.

Client: Compuware Corporation – Milwaukee, WI   **Sep 2011 – Sep 2012**
Responsibilities:
- Utilize standard features of Salesforce such as lead management and case management to ensure quick solutions to customers as well as business growth. By incorporating web-to-lead and web-to-case features, to provide an interactive shopping experience for customers.
- Created reports, dashboards, and processes to continuously monitor data quality and integrity and assisted users with report design and management.
- Customized page layouts for Opportunities, Contacts, and Accounts depending upon user-profiles and created permission sets where necessary.
- Establishing role hierarchies, profiles, and security setup within the organization. Utilized web-to-case forms, email-to-case, assignment rules, automation, queues, auto-response rules, escalation rules, and chatter groups to automate Salesforce.
- Working with Salesforce features like Objects, Workflows, Record Types, Page Layouts, Workflow Rules, Case Assignment Rules, Escalation Rules, Validation Rules, Profiles, Roles, Reports, and Dashboards, etc.
- Worked as Salesforce admin support governing user account creation, personal information setup, password reset, Roles & Profile creation, user group creation, updating company profile, Network access setup.
- Utilized Informatics on Demand to perform Data Transformations and Data Cleaning during data transfer to the external system.
- Defined master-detail and lookup relationships and created junction objects to connect objects.
- Worked with standard objects such as Account, Contact, and Leads to customize their fields and page layouts.
- Set up and control user-profiles and access levels for each database segment to protect important data.

E-Base Technologies - Fremont, CA   **May 2011 – Aug 2012**
Client: CD Networks
Responsibilities:
- Implemented Record-Level and Field-Level security and configured their sharing settings.
- Involved in gathering customer requirements from business user teams spread over Sales, Marketing and Customer service.
- Developed and Customizing Salesforce.com application based on user needs.
- Developed field & page layout customization for the standard objects like Account, contact, Leads.
- Maintained and gave permissions to communication templates based on Profiles.
- Involved in Accounts Merging, maintaining Public Groups
- Created Reports and Dashboards as per customer requirements.
- Worked on Record Types, Validation Rules, Triggers, and Page Layouts
- Worked with senior team members to analyze each product and its competitor, to integrate new products, and optimize existing products imported accounts and contacts data through Import Wizard
- Worked on data migration from databases to SFDC using Data Loader
- Build organization's role hierarchy by adding Roles as per organization structure and created custom profiles to satisfy organization's hierarchy.
- Designed various Custom Objects, Custom Fields, Page Layouts, Custom Tabs and Record Types as per requirements.
- Extensive experience in data migration and integration using Data Loader and Informatica Tool
- Experience in analyzing business requirements, entity relationships and converting to Salesforce custom objects, Lookup Relationships, Master-Detail Relationships
- Involved in creating gap analysis document, clearly identifying data, business process and workflows of organization with respect to Salesforce.com implementation.
- Implemented Sales Cloud, Service Cloud, Chatter, and custom applications in Salesforce.com.

- Created workflow rules and defined related tasks, time-triggered tasks, email alerts, field updates to implement business logic.
- Used Salesforce.com Application Setup activities and customized apps to match functional needs of organization.
- Applied different sharing rules and maintained users troubleshooting while managing tickets.
- Used Data Loader for insert, update and bulk import or export of data from Salesforce.com.
- Extract, and load data from comma separated values (CSV) files.
- Defined lookup and master-detail relationships on objects and created junction objects to establish connectivity among objects.