

ANNESHA BANERJEE

Presales Consultant

Profile

Experienced Presales Consultant with 6 years of expertise in the finance and procurement domain. Proficient in SAAS platforms, ESG regulations, S2P, P2P, financial data analysis, demos, and RFX. Have worked actively in EMEA and US markets.

EDUCATION

- MBA: Marketing & Finance
National Institute of Technology, Warangal
2016-2018
- B.Tech: Electrical Engineering
BENGAL COLLEGE OF ENGINEERING & TECHNOLOGY
2012-2016

CERTIFICATION

- Demo2Win
- Investment Foundations Certificate
CFA
- Sustainability and Climate Leadership
Project Management Institute

CONTACT

- +919432488871
- Anneshabanerjee05101994@gmail.com
- <https://www.linkedin.com/in/annesha-banerjee-b37131111/>

SKILLS

Pre-sales	SaaS solution	Financial products	Bid documentation	Demonstrations
AP Automation	Purchase-to-Pay	Source-to-Pay	Spend Analysis	Third-party risk management
Market data	Portfolio analysis	Equity data	Climate Regulations	Financial data processing
Technical sales	Products	Carbon Emission	Microsoft Office	ESG regulations

EXPERIENCE

Morningstar *March 2023-Present*

Presales Consultant, London

- Led operational walkthroughs during discovery sessions to gain an in-depth understanding of clients' business models, needs, and challenges, resulting in the design and creation of recommended Morningstar solutions that addressed clients' pain points and met their business requirements.
- Successfully managed projects and coordinated the completion of multiple RFPs and RFIs, resulting in a high success rate of winning new business and expanding existing relationships.
- Working on global ESG Regulations like TCFD, CSRD, SDR, SFDR, SOLVENCY AND BASEL as a subject matter expert for Climate Regulations and requirements
- Developed and presented proposals that illustrated Morningstar's understanding of client's needs and challenges, highlighting our innovative and scalable solutions consistent with Morningstar's business strategy, resulting in increased client satisfaction and retention.
- Sharing industry insights and relevant Morningstar capabilities with clients, resulting in increased awareness and adoption of Morningstar solutions in the marketplace

Basware *May 2022-Jan 2023*

Senior Presales Consultant, London

- Worked with Cloud-based solutions for Procurement, AP automation, and value chain optimisation.
- Led the development of tailored solutions aligned with the client's needs and business objectives.
- Drive value chain and procurement mapping to deliver optimised solutions enhancing operational efficiency.
- Worked on different ESG compliance and regulations for vendors in the European and US markets to streamline Vendor Risk and ESG Governance
- Cultivate strong client relationships through rapport building, POCs, and engaging product demos.

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- Design end-to-end procurement journeys covering Procure-to-Pay, Automation, Invoicing, and Invoice Management.
- Collaborate with cross-functional teams to configure user stories and workflows and use cases tailored to client requirements.
- Contribute to GTM strategy by onboarding and training new associates, AEs, and partners.

. GEP Worldwide June 2021-Feb 2022

Senior Presales Consultant, Mumbai, India

- Capturing client requirements, demonstrating the solution and preparing winning proposals by analysing RFX.
- Conducted multiple client POCs, resulting in a 70% conversion rate and revenue generation.
- Demonstrating value chain and Third-Party risk management and showcasing value addition through various analytics helps identify supplier alignment, thereby supporting information on Scope 3 emission
- Process mapping the procurement journey, including source-to-pay, source-to-contract, procure-to-pay, customer risk management, and completion for over 50 clients, improved the procurement process.
- Configured user stories, dedicated workflows, and use cases for 45 clients, resulting in a 20% improvement in user adoption
- Onboarded and trained 15 new associates, AEs, and partners as part of the GTM strategy.

TATA Consultancy Services July 2018-June 2021

Presales Consultant, Mumbai, India

- Led product demonstration and client positioning for TCS iON suite of products.
- Analysed RFI and RFP and successfully drafted relevant responses based on customer requirements and scalability of offerings, resulting in an increased win rate.
- Delivered compelling product demonstrations and technical set-ups for clients, resulting in better customer engagement and higher conversion rates.
- Analysed market growth and penetration strategies in new geographies and developed expansion plans that led to a successful market entry.
- Successfully handled Sales for the USA for TCS iON suites of products and platforms, resulting in a 15% increase in revenue