JESAL D MEHTA

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Professional Summary

- Highly motivated and result driven **Business analyst with 5+ years of professional experience** in **finance domain**, including 2 years of Credit Analysis experience.
- Experience working in all phases of **Software Development Life Cycle (SDLC)** in Agile environment.
- Function as an end to end Business analyst producing and reviewing various textual and visual artifacts using **BA standards/tools**, such as Business requirements document (**BRD**), Functional Specifications document (**FSD**), **Data mapping specifications**, **GAP analysis**, Scope documents, **workflow diagrams, Use Cases, Interface prototypes**, **Mock-ups, Requirement Traceability Matrix (RTM)** and **User Training Guides**.
- Excellent skills in **Requirement management** and handling **Change Requests.**
- Support **Project Manager** in forecasting timelines, providing estimates for project delivery, project presentations for senior stakeholders, identifying and mitigating risks.
- Developed and executed **Test Plans** and **Test Cases** that validate the requirements such as **SWIFT** character set compliance, etc.
- Experience in conducting **User Acceptance testing** (**UAT**) and **Integration testing** with both internal and external users.
- Executed basic **SQL queries** for data analysis and **data validation**.
- Knowledge in **financial domain** - **Equities**, Fixed Income Securities, Derivatives, Forex, **Treasury Operations**, **Cash Management**, Investment Banking, **Asset & Wealth Management, Portfolio Management**, **Banking**, Loans, Credit risk.
- Good understanding of Trade life cycle and institutional trade **clearance and settlement process.**
- Strong analytical, logical and **problem solving** skills and highly **detail-oriented** with an ability to multi-task and efficiently prioritize work assignments.
- Excellent **presentation** and **interpersonal** skills and adept at building business customer relationships.
- Quick learner of new systems, an **active team member** with an equal ability to work **independently** in fast-paced and demanding environment, demonstrated success in guiding projects to completion.

Skill Set

Functional Skills	SDLC Methodologies (Agile, Waterfall), Requirement Management, Documentation, Data Analysis, Data Mapping, Modelling, Prototyping, Test plans, Test Cases, Defect Management, UAT
Technical Skills	**MS Office** (Word, Excel, PowerPoint, Outlook), MS Project, MS SharePoint, **MS Visio, JIRA**, Version One, Balsamic, **XML** and **JSON, SQL**
Certification	Chartered Financial Analyst **(CFA) - Level I**

Education

- **Masters in Management Studies (MMS-Finance),** Mumbai University, India (2008)
- **Bachelors in Management Studies (BMS),** Mumbai University, India (2005)

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Professional Experience

VSys Inc   ***October 2014 – March 2018***
Client: DTCC, Boston, MA   *January 2018 – March 2018*
Business Analyst
Project: Design & Development of DTCC Exception Manager Application (DXM)

The DXM project involves creating a new exception and workflow management service that provides a centralized venue to publish, manage and communicate on Trade and Settlement exceptions throughout the Trade Life-cycle process. The project will be leveraging new technologies that are available on the Cloud platform, where by, it will provide multiple integration points via API's and a rich web user experience.

- Studied the underlying architecture and messaging framework of the cloud based application.
- Elicited requirements from the Product Owner on the stories prioritized for the ongoing Release.
- Researched, analyzed and documented the requirements to add new features such as assigning priorities to exceptions, capturing exception data provider party, etc. and reviewed with the team.
- Participated in the workflow design discussion related to routing of Trade/Settlement Exceptions into DXM from other DTCC products, enriching them along the way.
- Suggested a few usability improvements for a better user experience.

Client: DTCC (formerly Omgeo LLC), Boston, MA   *May 2015 – January 2018*
Business Analyst
Project: UI re-design of Omgeo Central Trade Manager (CTM)

The project involved re-designing the back-end and front-end UI of a post-trade matching and settlement application, Omgeo Central Trade Manager, in an effort to move away from the Java Applet technology to a web based user interface and improve the performance and usability aspects as a by-product.

- Worked with other team members of the Agile delivery team and went on to be the lead Business Analyst since the last two releases of the project.
- Performed Gap Analysis between the existing CTM Trade Blotter and the desired requirements for the new interface.
- Researched, analyzed and translated business workflows, data, messaging, and business rules into user interface requirements.
- Actively participated in brainstorming sessions with the Product and UX Designers to create the UI designs based on business workflows.
- Conducted design walkthroughs, demos and functionality feedback sessions with internal and external stakeholders (both Buy-side and Sell-side).
- Created module mock-ups using Visio and Balsamiq to depict UI behaviors and provide a clear insight of the functional requirements.
- Documented detailed user flows and functionality using both visual and written specifications in BRDs and reviewed them with the entire team.
- Ensured that the user interface is of high quality and performs well despite the technical constraints associated with application requiring interactions around large amounts of data.
- Defined and validated the Acceptance criteria for each story and provided sign-off.
- Analyzed data captured in Splunk Reports to validate user actions and navigation flows within the system.
- Partnered with internal stakeholders such as CTM Core Team, the Client-Facing Documentation Team and the Client Support Team on operational readiness activities by sharing subject matter expertise on the new features and functionality.

- Performed Impact Analysis of the new features or functionality introduced by the Cross functional teams on our project.
- Reviewed the QA test plans to ensure optimum test coverage.
- Supported the UI and Mid-tier Development team on an ongoing basis.
- Played an instrumental role in conducting and driving the Release planning sessions.
- Assisted in training the new members while on-boarding them on the project.

Client: State of Massachusetts (ANF), Boston, MA   *October 2014 - April 2015*
Business Analyst
Project: Enhancement of Enterprise Grants Management Solution (MassGrants)

MassGrants provided a move away from the traditional manual and paper based processes to a cloud-based centralized Grants management system, enabling the Grant, Program and Fiscal officials of the State Agencies to manage all the pre-award and post-award activities of the grants lifecycle in a single place.

- Critically evaluated the System Training Manual of the product to ensure conformity to the Business rules and business process workflows of the system.
- Liaison with business users to gather feedback and reported any changes/additional features desired in the next release.
- Ensured timely completion of Data Migration activity by taking up the responsibility of data conversion and data validation of the pending Grant Awards to be uploaded into the new system.
- Maintained the Data migration status report of the team on a daily basis, thereby streamlining the process and providing better visibility to the Program Manager.
- Identified the operational workflows and integration requirements with other systems, for some of the next-in-line enhancement features of the application and made a walk-through presentation to the business owners and the project team.

State Bank of India (SBI), Corporate Account Group, Mumbai, India   *July 2008 – April 2010*
Credit Analyst (Corporate Banking)
- Minimized risks for the bank by meticulously analyzing the quarterly financial statements, annual reports and projections of firms; studying in-depth the present and future outlook of various industries (primarily Cement and Textiles); assigning appropriate Internal Credit Rating to the firms and their facilities based on industry risk, financial risk and management risk to determine their creditworthiness; prompt recognition and reporting of deteriorating credit risks for further action.
- Evaluated and assessed credit applications and structured credit facilities to cater to clients' requirements for Working Capital, Trade Credit and Term Loans while ensuring minimal risks for the bank.
- Prepared business proposals that included pricing and credit terms for the various credit facilities extended to the clients.
- Cultivated and maintained successful client relationships through regular visits to their corporate office to maximize business opportunities. Addressed and resolved client issues by working closely with a team of credit operation associates.
- Developed and implemented strategies to offer better services to the client. Estimated the business potential from client for various products offered by bank to grab the timely opportunities and engaged in cross-selling of other products with the assistance of the product specialist teams.
- Ensured compliance with RBI (Indian Central Bank) lending regulations, Bank's Loan policy & Deviation norms and clients' compliance of the terms and conditions of the agreement.
- Monitored the level of collateral security, assisted in execution of collateral documents for the credit facilities extended to the clients and handled day to day correspondence and records of clients.

Key Achievements
- Played an instrumental role in generating additional business of approx. USD 110 million by establishing new clients resulting in increased income for the bank.
- Achieved the annual goals assigned to the team and contributed an average annual increase of 10% to our business loan portfolio.
- Improved client retention and satisfaction through relationship building and timely service delivery.

Academic Project (MMS)

Cash Management Services (CMS) in Indian Banks   ***March 2008***
- Gained insight into the Cash Management Services provided by Indian Banks and analyzed its importance to corporate customers and banks.
- Studied the periodic RBI initiatives to support and enhance CMS.
- Conducted a special study on ICICI Bank Ltd. (India) to understand the practical aspect of the CMS process, applicability of the various products offered and its competitive strengths and weaknesses in the Indian banking environment. Recommended stronger emphasis on liquidity management solutions, reduction of CMS charges for existing bank clients that are giving other businesses; and better marketing of the CMS products on the website.

Summer Internship (MMS)

Fulford India Ltd, Mumbai, India   ***May 2007– June 2007***
Treasury Management and Investments (Subdivision of Finance Dept.)
- Gained an understanding of the catalyst role played by the Treasury manager of a company in complying with the company's banking policies, while simultaneously ensuring timely bank requirements for the smooth day-to-day operations.
- Gained an insight into the processes and methods of disbursements, collections, remittances and transfers adopted by the company; the significance of cash management services provided by banks in minimizing floats and the importance of forward contracts in minimizing the foreign exchange risk for the company.
- Understood the methodology of deriving the cash position by forecasting cash inflows and outflows on a daily basis, and investment of surplus funds in accordance with the company policies.
- Conducted a Treasury Audit exercise to verify that the treasury functions are being complied as per the company policies and submitted the observations.