

Mudit Mishra

Salesforce Data & Analytics Architect | CRM Analytics | Data Cloud | Agentforce

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EXECUTIVE SUMMARY

- Enterprise Analytics and Data Architect with nearly 20 years of experience designing, modernizing, and governing scalable enterprise data platforms across financial services, retail banking, and executive education sectors.
 - Deep expertise in Salesforce **CRM Analytics** (CRMA), embedded analytics architecture, governance models, and enterprise-scale deployment frameworks.
 - Extensive experience in enterprise data architecture, multi-org Salesforce integration, ETL/ELT design, layered data staging, semantic modeling, metadata standardization, and platform observability.
 - Hands-on experience leveraging **Einstein Discovery** and Salesforce **Data Cloud** to enable **predictive analytics** and AI-assisted decision-making grounded in harmonized and governed enterprise datasets.
 - Architect of AI-ready enterprise data platforms supporting **Agentic AI** and conversational analytics.
 - Trusted advisor to C-suite stakeholders translating business strategy into scalable analytics roadmaps and enterprise AI transformation initiatives.
 - Led globally distributed teams across onshore and offshore models, guiding Business Analysts, Developers, QA, and UAT teams through complex implementations and governed analytics rollouts.
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CORE COMPETENCIES

- Enterprise Data Architecture & Integration: Multi-Org Integration, ETL/ELT Design, Layered Data Staging, Orchestration, Semantic Data Modeling, Metadata Governance, Security Predicates.
- Salesforce Analytics & AI: CRM Analytics (CRMA), Einstein Discovery, Data Cloud, Agentforce, Conversational Analytics.
- Analytics Engineering & Development: Dataflows, Data Recipes, Salesforce Flows, SQL, SAQL, SOQL, JSON, Embedded Analytics.
- Advanced Analytics: CLV, Retention & Churn Analytics, Predictive Modeling, Customer Wait Time Forecasting.
- Enterprise BI Platforms: Oracle BI, BI Publisher, OBIEE 11g/12c, Hyperion, Oracle EPM IR 11x, Tableau.
- Leadership & Delivery: Client Advisory, Pre-Sales Architecture, Technology Road mapping, Agile & CI/CD Delivery, Team Mentorship.

PROFESSIONAL EXPERIENCE

Salesforce Inc., USA | Salesforce Professional Services | Analytics Architect | Dec 2021 – Present

Major Engagements: GEICO, AWS, NASDAQ, Wells Fargo, Alliant, Aflac

As part of Salesforce Professional Services, I partner with enterprise customers as a trusted data and analytics advisor. My role spans discovery, pre-sales architecture, enterprise data platform modernization, CRM Analytics governance, and AI-ready data foundation. I focus on building scalable analytics ecosystems that embed predictive insights directly within Salesforce while preparing organizations for **Agentic AI adoption**.

- Partnering with GTM to support a **multi-million-dollar pipeline** through analytics demos; Earned formal recognition from a top-tier FinTech client, resulting in **multiple \$1M+ services** engagement extensions.
- Led post-M&A enterprise data **integration & harmonization** across four business units in a **multi-Salesforce-org** environment, architecting a unified Single Pane of Glass (**SPoG**) customer analytics solution delivered in weeks instead of waiting months for full org integration.
- Redesigned **ETL pipelines** and governance frameworks, reducing **data latency by 40%** and eliminating **20+ hours per week** of manual reporting effort.
- Enabled **cross-sell initiatives** through **Client 360 dashboards**, generating **~\$2.5M** in new business within weeks of rollout and becoming the primary dashboard used in monthly sales leadership calls.
- Led enterprise retail banking analytics modernization with scalable ETL processing **250M+ records**, empowering **5,000+ bankers** with embedded Book of Business insights across **47M+ customers** and related client hierarchies to drive effective customer outreach and **data-driven sales conversations**.
- Developed predictive and advanced analytics including Customer Wait Time models, Customer Lifetime Value (**CLV**), retention, and churn analysis
- Developed customer experience analytics (**First Call Resolution (FCR)**, **Average Handle Time (AHT)**, and **Net Promoter Score (NPS)** within Service Cloud, enabling leadership to measure the impact.
- Defined Analytics architecture and governance standards while **leading cross-functional teams** across onshore and offshore delivery models in agile CI/CD environments; mentored consultants and supported recruiting and on boarding initiatives.
- Collaborated with **Salesforce product and engineering teams** to escalate enterprise client issues, reproduce defects, and influence product enhancements based on large-scale customer feedback.

Harvard Business School – ExEd | BI Consultant (Contractor via Delasoft) | Feb 2015 – Dec 2021

Joined during Salesforce implementation preparation and led BI platform readiness for enterprise go-live. Progressed into restructuring and modernizing the analytics ecosystem, migrating legacy reporting assets and aligning enterprise data architecture with Salesforce's evolving data model.

- Representing the needs of **Analytics and Reporting** during the development of new salesforce features, customization & automation to ensure interoperability with BI solutions.
 - Prepared BI and reporting platforms supporting **500+** enterprise users during **Salesforce go-live**.
 - Re-architected BI ecosystem and migrated legacy assets to CRM Analytics and **OBIEE 12c**.
 - Developed CRM Analytics dashboards using **SAQL, SOQL, JSON**, and **Data Recipes**.
 - Maintained OBIEE RPD repository and BI Publisher reporting frameworks.
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Capgemini Financial Services, India | CLSA Asia-Pacific | Team Lead | Nov 2009 – Jan 2014

Led BI Reporting desk supporting global equity trading, settlement, and clearing operations. Managed mission-critical reporting infrastructure serving institutional clients while driving modernization, automation, and cost optimization initiatives.

- Led a team of **9 analysts** managing Middle and Back Office reporting environments supporting **300+ users** and **3,000+** reports across **30+** Oracle and Teradata databases.
 - Developed Trade/Non-Trade, Finance, Regulatory, and Reconciliation reporting solutions, including Contract Notes and Trade Confirmations for Middle and Back Office operations, supporting end-to-end trade execution milestone reporting.
 - Supporting Run-the-Bank operations; built self-triggering reports for trade execution, settlement, trade lifecycle monitoring.
 - Promoted engagement to Managed Services reducing project cost by **~30%**.
 - Upgraded Hyperion 9.3 to Oracle EPM 11.1.2 and migrated reporting assets.
 - Enhanced reporting performance through index tuning, pre-aggregation, and optimization.
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KPIT Technologies Ltd., India | Application Developer | Jul 2006 – Nov 2009

Began IT career as Associate Trainee and progressed into Application Developer role working with Hewlett-Packard (USA) and Unilever (UK). Built strong foundation in advanced Oracle PL/SQL development and production support which laid groundwork for future data architecture expertise.

- Developed enterprise applications using packages, procedures, triggers, **dynamic SQL**.
 - Built benefit compliance web applications using Oracle Web Application Server and PL/SQL Cartridge.
 - Provided production support for **Hyperion Analytics** and Reporting environments.
 - Performed server monitoring, backups, and incident resolution coordination.
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CERTIFICATIONS

- Salesforce Agentblazer Legend (2026) | Certified Agentforce Specialist | AI Associate
- Salesforce Certified Data Cloud Consultant | CRM Analytics and Einstein Discovery Consultant
- Salesforce Certified Administrator | Platform App Builder
- Teradata Certified Professional | Oracle Certified Associate - Oracle 9i PL/SQL Developer
- ITIL V3 Foundation & Intermediate Certification (Service Operations)
- NCFM Certifications in Financial Market, Securities Market, Capital Market, Derivatives & Options Trading Strategies

EDUCATION

- **Bachelor of Engineering** – 2006, (4 Year Degree Course)
Rajiv Gandhi Technical University (RGPV) Bhopal, India.
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