

# Pooja Pareek

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## Salesforce Certified Administrator | Business Analyst

- 5+ years of finance industry experience with around 3 years of experience with CRM platforms as a Salesforce Administrator.
- Experienced in developing and administering various projects to customize salesforce applications and implement business logic.
- Experienced in Process Builder, Flows, Workflow, Apex classes, Triggers, Webservices, Aura Component, LWC, and Visualforce pages for multiple projects by following Salesforce best practices.
- Worked on multiple tools like Data Loader, Visual Studio Code, etc.
- Worked as a business analyst to help the client find a backup solution for Salesforce. Accustomed to working in large and small team environments and coordinating with cross-functional teams.

## CERTIFICATIONS

- **Salesforce Certified Administrator** *Credential ID: 2692418*
- **Salesforce Certified Business Analyst** *Credential ID: 3389400*
- **Salesforce Certified Platform App Builder** *Credential ID: 3107929*
- **Salesforce Associate** *Credential ID: 3353033*

## WORK EXPERIENCE

### Salesforce Consultant/Administrator

[Jan 2023 - Nov 2023]

#### *Portraits for Patriots, Remote*

- Collaborated with a 10-12 member team for full-cycle Salesforce build-out for military customers, ensuring seamless integration.
- Employed user personas, business process maps, user stories, and gap analysis to analyze requirements for addressing business challenges.
- Developed and implemented Process Automation (Flow) to streamline client and photographer feedback surveys, aiming to increase completion rates by 25%.
- Created a data-driven heat map process for strategic resource allocation to improve project efficiency.
- Leveraged Experience Cloud for gathering client and photographer feedback through surveys, enhancing customer support and service quality.
- Wrote detailed Jira task breakdowns, including solution notes, acceptance criteria, and testing procedures from client stories and business processes for project integrations and components

### Salesforce Administrator & Business Analyst - Apprenticeship

[Jan 2023 - March 2023]

#### *Clicked, Remote*

- Elicited, documented, and analyzed requirements around business challenges by utilizing user personas, business process maps, user stories, and gap analysis
- Documented deliverables using project management tools: Jira, Confluence, Miro, and Google Suite
- Translated business challenges and provided solutions using the Salesforce platform
- Prepared a presentation and presented my findings to peers and industry professionals

### Career Break due to COVID-19 and Family Circumstances

- March 2020 - February 2021: Part-time involvement in the family business during the COVID-19 pandemic, as the business operations were significantly impacted.
- March 2021 - December 2021: Family circumstances took precedence, and I took a step back from professional commitments to focus on supporting and caring for my family. This period also allowed me to prioritize my health and well-being.
- January 2022 - Present: Upon relocating to the United States, I embarked on my Salesforce journey, actively pursuing training and development in Salesforce to build new skills and transition to a new professional path in the technology sector.

## **Salesforce Admin & Financial Planning Manager**

**[Feb 2019 - Feb 2020]**

### ***Finedge Advisory, Gurugram, India***

- Guided clients in achieving financial goals and secured a stable financial future.
- Leveraged Salesforce Admin skills to streamline and automate financial assessment processes, ensuring accuracy and efficiency.
- Developed and implemented tailored financial plans based on a comprehensive analysis of client data, leading to improved client satisfaction and retention.
- Strengthened client relationships by providing ongoing support and advice, resulting in increased referrals and business growth

## **Financial Accountant**

**[Jan 2017- Jan 2019]**

### ***BNT & Associates, Bhubaneshwar, India***

- Prepared monthly profit and loss statements, balance sheets, and cash flow statements to provide accurate financial insights for decision-making.
- Analyzed data for precise financial forecasting and budgeting, and assisted in preparing year-end accounts and taxes to ensure compliance.

## **Accounts Manager (Finance)**

**[Aug 2011 - Feb 2014]**

### ***Pareek Informatics, Cuttack, India***

- Managed accounts in Tally ERP9 and daily operations for a BSNL distributorship, ensuring smooth transactions and business growth.
- Played a key role in securing a new region by participating in BSNL's annual distributor meeting and improving service quality through channel partner feedback.

## **PROJECTS**

### **Salesforce Job Application Tracker Capstone Project (Coding Project)**

- Built a user-friendly job application tracker that integrates with an external system using declarative and programmatic solutions including Asynchronous Apex, REST callouts, and Lightning Web Components (LWC)

### **Salesforce Experience Cloud Portfolio (Coding Project)**

- Built a portfolio programmatically using Lightning Web Components (LWC)

### **Salesforce Recruitment App (Declarative Project)**

- Built a Recruitment App on Salesforce to streamline candidate management, job postings, and interview tracking.
- Optimized recruitment processes by developing custom Salesforce solutions for efficient job and candidate management.

## **EDUCATION**

- **Salesforce Developer - Cloud Code Academy**
- **Masters of Business Administration- Sri Sri University**
- **Bachelor of Commerce- Ravenshaw University**

## **PROFESSIONAL SKILLS/SOFTWARE**

- Salesforce Platform- Formulas, Data Modeling, Lightning App Builder, Data Migration tools, Process Automation (Flow), Reports, & Dashboards, Security, User Management, Customization & Configuration, Data loader
- Slack
- Programming- Apex, SOQL, SQL, Microsoft Office (Word, Excel, PowerPoint, Outlook, Teams)
- Frameworks- Visualforce Pages, Lightning Web Components (LWC)
- Jira & Confluence
- Declarative Programming