

ANNETTE VALLE

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Business Analysis & Process Re-Engineering / SFDC Administrator / AI Specialist

Business Systems Analysis and Salesforce professional with strong communication and process optimizations skills. Intuitively aligning with Sales, Service, Marketing and Operations stakeholders at all phases of the lead-to-cash life cycle transforming business objectives into Agile SDLC deliverables of high quality. Skilled AI Design & Adoption ROI

Certifications & Competencies



Certifications

Salesforce Administrator [ADM201] 2018
Salesforce Sales Cloud Consultant [CON201] 2020
Salesforce Business Analyst 2023
Sales Operations Specialist 2024
Salesforce AI Specialist 2024

SDLC Best Practices

SCRUM and SAFE • Agile SCRUM Certification – Scrum Alliance 2021
Certified Scrum Master [CSM] 2021 SCRUM
Project Management: JIRA/Align, Confluence, Trello
Business Process Modeling – Miro, Lucid, MS VISIO, ADONIS
Behavior-Driven Development (BDD) - **Cucumber**

Technical and Tools

SOQL & SQL – Proficient **ServiceNow** – Trained and proficient
Tableau – Proficient **Miro** – Advanced
Data Loader - Expert **Excel** - Expert
Business Intelligence & Data Warehouse – Certificate, TDWI – 2016

Business Analysis Certification – 2021
CPQ – Salesforce & Custom; Billing Specialist Super Badge
Dev Op's - Copado Training, Azure Dev Op's - Competent
Defect Tracking - Radar

Functional: Sales & Marketing and Service

Martech Stack: Pardot, SalesLoft, ZoomInfo, Gainsight
Challenger Sale Methodology – Training, 2014
Executive Speaking - Certification - Speakeasy Institute – 2013
Biotechnology – Methods & Compliance, Cert USC 2009

Account-Based Marketing (ABM) Demand Base
ServiceMax – Admin Support for Field Service Scheduling and WO's
Revenue Op's & Customer Success – Outreach, Gong.io, Gainsight
Salesforce Clouds: Sales, Service, CPQ with Billing, Health Cloud

Professional Experience

IBM & SALESFORCE AI + DATA | Training Fellowship | 08/2024 – 01/2025

SFDC and IBM Professional Certification program to master AI Prompt Engineering, structuring datasets for ML, designing autonomous AI Agents (Sales, Service, Order Mgt.) Best-practices for utilizing large language models (LLMs) and generative AI models like Einstein GPT and OpenAI for natural language processing (NLP). Professional Industry Trainers and real-world use case-based training on the Administration and Application of state-of-art Salesforce Solutions for **Artificial Intelligence (AI)**, **SFDC Data Cloud** and **IBM Data Analysis** techniques for data-driven insights. Conducted in-depth research and analysis of documenting process flows, leveraging process improvement methodologies and the integration of Gen AI technologies to align with evolving business needs and use cases in Delta.

- Data Analysis Fundamentals [Cert 11/24]
- Data Analysis Team Sprint [Cert 11/24]
- Visualize Data with IBM Watson Studios
- Salesforce Data Cloud – Team Sprint
- Preparing for AI as a Salesforce Admin
- Salesforce AI Associate {Cert 12/24}
- Einstein Consultant – Team Sprint
- AI Prompt Engineering – Team Sprint
- Advanced SQL Analytics
- Data Quality with AI
- Salesforce Data Cloud Certification
- Configure Experience Cloud & Agents

ROCKWELL AUTOMATION | Minneapolis, MN | 05/2023 – 05/2024

Lead Business Process Analyst – Enterprise Transformation – Digital Engineering

Partner Operations and Asset process optimization involving SAP Commerce Intergradations to multiple back office and legacy CRM's.

- Drive Quote-to-Cash commercial business objectives by aligning cross-engineering disciplined Agile SCRUM Teams
Enterprise Stack: Salesforce CPQ/ Billing, SAP Commerce Cloud [Hybris], Microsoft CRM and Mulesoft API Integrations
- Responsible for EPIC decomposition into User Stories and grooming cross-functionally -addressing risks and dependencies
- Accountable to Stakeholders and Program Planning for keeping the Program Increment initiatives on-track

WIPRO | Sunnyvale, CA | 09/2022 – 05/2023

Senior Salesforce Consultant and Business Process Analyst – Salesforce Project Sr. Leadership and Consulting

Projects:

APPLE - Sr. Business Analyst – Consultant, Digital Transformation
• Marketing & Lead Management SFDC Discovery Analysis and Process Documentation
• Sales Engineering UAT team – feedback analysis and defect reporting
• CRM Operational Support – Issue Tracking and Resolution

Humana – Sr. Salesforce Business Analyst – Salesforce Health Cloud Implementation
• Stakeholder Relationship Manager and Process Improvement SME
• Salesforce Health Cloud full-cycle implementation - SAFE Agile SDLC methodology
• Transform Business Capabilities into EPIC's and User Stories - Agile SCRUM Coach

ACCURAY | Sunnyvale, CA | 10/2021 – 08/2022

Salesforce Administrator & Analyst – Global Go-to-Market and Lead-to-Cash SFDC Analysis and Administration.
Clouds: Sales, Revenue, Pardot and ServiceMax Integrations. 850 Platform Users

- Requirements Analysis and Stakeholder alignment – Sales, Marketing and Operations - requirements elicitation, backlog grooming. Scope and SFDC best-practice direction on Roadmap priorities. UAT and Training.
- SFDC Admin: Managed Salesforce platform and highly customized CPQ configuration: Lead and Territory assignment; Approval processes, Automations, Security and Data Import/Export and Archival strategy
- Stood-Up SFDC Governance and Data Quality Processes – Documentation of all Integrations, Automations; Change Management Process; Data Storage Strategy

PARAMOUNT ENTERTAINMENT/LTI Mindtree | Los Angeles, CA | 06/2020 – 02/2021

[Senior Business Systems Analyst](#) – Lead discovery and conducted all elicitation Workshops and Interviews documenting global project requirements, Process Diagrams, SIPOC Analysis, Personas and Role-based security. Agile SCRUM SDLC: created EPIC's, feature backlog and user stories.

Project **Global Marketing and Partner Digital Transformation** – Re-engineer a custom Digital Asset design and approval process as Salesforce best practice solution. Featuring: extensive workflow and process automation features and Partner engagement and digital assets management process for large files within SFDC.

SALESFORCE.COM | San Francisco, CA | 04/2019 – 03/2020

[Salesforce Business Analyst](#) - Global Sales Operations, GTM Business Architecture Analyst

Responsible for Security and Data Quality Policy consistently across platform enhancements and net new functionality

- Impact Analysis review of over 900 Salesforce modification and enhancement cases – interfacing between IT and business stakeholders. Lead UAT validation.
- Work collaboratively w/ Admin Teams and Business Stakeholders enhancing:
 - Sharing Rules
 - Process Automation
 - Profile Management
 - Approval Processes
 - Object Relationships
 - Permission Sets & Field Level Sec
 - Lightning Apps & Layouts
 - Validations Rules
 - Deprecation and At-Limit Analysis
- **Product Owner: Sales Enablement Managed Package** [Altify]
Feature Prioritization and new feature enhancements change management; upgrade planning/execution
- **Business Process Improvement** – Service Cloud Case management and Approval Process enhancements project.

DOCUSIGN | San Francisco, CA | 01/2019 – 03/2019

[Salesforce Admin-Analyst Internship](#)

Project: **Salesforce Tech-Debt Strategy** - Org wide analysis/mitigation strategy: Reports & Dashboard tech-debt.

- Developed analytics insights and Dashboard utilizing SOQL metadata and Custom Reports to inform management and support deprecation strategy - Insights applied as part of Lightning Experience Transition plan
- Engaged with 1,600+ Org Users/ Stakeholders to Communication Project Goals/Process, Analyze Impact

JVS | San Francisco CA | 2018 – 2019

[Salesforce Administrator / Analyst Associate](#)

Intensive instructor lead hands-on Salesforce Administration/Business Analysis Training program

- Security
- Data Import/Export
- Business Requirements Analysis
- Reports & Dashboards
- Workflows & Process Builder
- Lightning App Builder

RICOH Digital Solutions | San Francisco, CA | 2017 – 2018

[Business Process Analyst & Consultant](#)

Analysis of Sales and Field Service processes and modernization design driving net-new revenue and renewal metrics.

Engaging Field Service & Sales leadership via elicitation interviews, Workshop's, surveys.

- Cross-functional Business Requirements mapping and optimal process improvement - Increasing Up-sell/Internal Referrals for key accounts by 48%
- Designed and launched "Client Insights" Account Intelligence Sharing Program – adopted by over 800 Field Engineers and Sales professionals with in 1 quarter.

SYNERGY SOLUTIONS | San Francisco, CA | 2013 to 2017

[Sales Director & Sales Enablement Practice Lead](#)

Lead Sales team and Client Development for CRM Consulting - Siebel to Salesforce Migration and Custom App development consultancy. CPQ and Quote-to-Cash experts - Managed Services for Pricing Data and Order Back-up. Player-Coach role grew team and revenue 38% yearly maintaining high-margin profitability.

Education

Bachelor of Science (BS) - Central Michigan University Major: Economics

Minor: Computer Science

Biotechnology Methods – Professional Certification 2009 UC Santa Cruz