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**PROFESSIONAL SUMMARY**

* **7 years** of Information Technology experience in **Business Analysis, Data Analysis and Project Management** in **Financial Services, Banking, and Insurance** domain.
* Over 7 years of experience in Business Analysis methodologies and **iterative Software** **Development Life Cycle** (SDLC), **Rational Unified Process** (RUP), **Agile,** Scrum, **Waterfall** etc.
* Proficiency in documenting business needs into **Business Requirement Specification** and Functional and non-functional requirements, business rules, business process models, Context Diagram, Workflows **and use cases** etc.
* 7+ years of experience in **understanding, analyze and design business processes** and workflows with the objective of providing recommendations for the best use of technology for improvement.
* **Strong understanding** of **Business Process Flows & Case** Tools in Capital Markets/ Equity Structured Products and Associated risk profiles (Fixed Income, Equity, and Derivatives). Projects include: **Portfolio Asset Management** (PAM), **Risk Management**, Credit Risk, Cash Equities, Mortgage, Fund Transfer & Operations, **Hedge Funds**, Mutual Funds, Loans, Corporate actions, Securities Lending, Commodities, Brokerage, Equities, Annuities, Actuaries Insurance (Life, Auto, Property & Casualty) & Reinsurance.
* 7+ years of experience in **Business Analysis, GAP Analysis and Requirement Gathering** through conducting **interviews, workshops, JAD/JAR sessions** to define the **AS-IS and TO-BE** business processes with Business Community, Development team, Testing and QA Analysts, and referring to existing system documentation and procedures.
* Performed **Data Mapping, Data analysis** and data manipulation of source data from SQL Server and other data structures to support the business organization.
* Experience in all **MS office and project management tools** (MS-Excel, MS-Word, MS-PowerPoint, MS-Visio, MS-Access MS-Project and MS-SharePoint 2010).
* Experience in facilitating **change management across** entire process from project conceptualization to testing through project delivery.
* **Exhibit strong analytical** ability during **Functional Test, Regression Test and User Acceptance** Test phases and **efficiently prioritize and manage the defects** using the Defect Tracking system.
* Experience in writing **Testing requirements, developing test plans, Test cases** as per the business process requirements to match the functionality requirements and UML diagrams.
* Actively involved in business refinement process, including **checking and validation** of **requirements in conjunction** with the stakeholders.
* **Excellent communication, analytical, interpersonal and presentation skills**, expert at managing multiple projects simultaneously.
* Confident, Pro-active, analytical, **fast learner, assertive**, detail oriented candidate with **excellent multitasking capabilities** to perform exceptionally in ever changing and stressful environment.
* **Expert in developing effective working relationships** with the client teams to **understand and** **support requirements**, scoping/prioritizing projects, developing strategic plans to implement technology solutions, and **effectively managing client expectations**.

**TECHNICAL SKILLS:**

* **Business Analysis**: Requisite Pro, Rational Rose, MS Visio, Crystal Reports.
* **Database:** MS Access, MS- SQL Server, Oracle.
* **Project Management Tools:** MS Project (WBS, PERT, Gantt Charts), MS Visio, MS Access, MS Excel, MS Outlook, MS PowerPoint**,** MS SharePoint 2010**,** VSS, Rational ClearCase, Lotus Notes.
* **SDLC/Design Methodologies:** Unified Modeling Language (UML), RUP, Waterfall, Agile/Scrum.
* **Testing Tools**: Mercury Win Runner, Quality Center, Load-runner, Quick Test Pro (QTP), and Rational Tools.

**EDUCATION**

* **CFA** (Chartered Financial Analysis) Level 1 (CFA Institute, Virginia USA)
* **Masters of Business Administration** (Major - Finance and HR), India
* **Bachelors of Commerce –** Finance (Honors), India

**PROFESSIONAL EXPERIENCE**

**Blue Cross Blue Shield, Providence, RI Dec’11- Present**

**Data Analyst/Business Analyst**

Blue Cross Blue Shield is the largest non-profit health insurance organization. Blue Cross Blue Shield insurers offer some form of health insurance coverage in every U.S. state. They also act as administrators of Medicare in many states or regions of the US and provide coverage to state government employees as well as to the federal government employees under a nationwide option of the Federal Employees Health Benefit Plan.

**Project Scope:** The project was to replace ICD-9 codes set with ICD-10 procedure codes. The aim of this project was to recognize the impact and the affected areas of ICD-10. As a Data Analyst, I was involved in requirement management of Data Analytics area which included Financial Analytics, Health analytics, IT Operations and Marketing.

**Responsibilities:**

* Interacted with Users, Project Manager and Subjects Matter Experts (SME) to understand the business process. Conducted **group meetings** and **interviews** with SMEs to gather critical Business Requirements.
* Documented the scope of the project and determined the out of scope requirements.
* Coordinated **Joint Application Development (JAD) sessions** with end users and development team to define System Requirements.
* Created Business Process and Data Models to facilitate better understanding of project changes.
* Performed complex **data aggregation** and **data validation**.
* Based on gathered requirements, created **Business Requirement Document** to capture the business requirements.
* Assisted in understanding electronic interfaces between the electronic health record system and the external system.
* Involved in migration of any modifications of electronic data interchange, form updates and reports according to change management guideline.
* Created **Functional Requirement Document** that capture and provide detailed description of the requirements.
* Coordinated with developers to ensure that they clear understanding of the requirements.
* Applied **Unified Modeling Language (UML)** methodologies to design **Use Case Diagrams, Activity Diagrams and Sequence Diagram**.

**Environment & Tools:** MS Office 2007, Lotus Notes, Microsoft Visio, UML, MS Project professional 2007, **SQL**.

**John Hancock, Boston, MA Aug’10 – Nov’11**

**Business Analyst**

John Hancock Life Insurance Company is committed to offering the highest quality annuity, life insurance, and pension products to our clients. Its family of products has been built around a powerful combination of investment options chosen with the goal of providing risk adjusted returns and broad diversification across asset classes, investment styles and asset managers.

**Project Scope**: The project included fixed income Performance Attribution in order to support the organization’s goal of providing its customers with the most valuable advisory services.  The aim of the project was to provide customers with a vivid picture of performance charts and yield curves for tools better asset Projections and Portfolio Rebalancing in order to meet the liquidity preference of diverse customers.

**Responsibilities:**

* Gathered requirement from the Credit Management, Investment Management and Portfolio management teams to maximize the profitability of the securities holdings through customer’s credit profile which helps proactively re-balancing the credit risk in line with the credit team's view on credit spreads, purchasing and exiting securities as required.
* Conducted user interviews at In-house and client locations, gathering and analyzing requirements.
* Performed Gap analysis by identifying existing technologies, documenting the enhancements to meet the end state requirements of the customer.
* Performed data modeling for the project so that it will documents and organizes the business data for communication between team members and is used as a plan for developing applications.
* Assisted Project Team in preparing Business requirements document, Functional and nonfunctional Requirements Specifications, System Design Specification (SDS), Software Requirement Specification (SRS), Data Dictionary, and Business Continuity Plan (BCP).
* Exposed to the management of the risk and return structure of the private client portfolios regarding modern portfolio theory and clients' risk preferences.
* Produced the visual models for the application to create state charts, sequence diagrams and activity diagrams.
* Created Use-Case Models using MS Visio to depict Actors and Use-Cases in various Business Processes and identification of Basic/Alternative flows and definition of preconditions and post conditions of the system.
* Lead requirements review sessions of requirement with end users, created workflows and charts, Business Processes for reference data, financial instruments data attributes and data mapping with MS Visio and Excel to capture credit derivative models.
* Analyzed system requirements developed detailed Test plan, Test cases, Test scripts for testing the functionality, User Interface and security testing.
* Collaborated with the Quality Assurance team to ensure adequate testing of software, maintained quality procedures, and ensured that appropriate documentation is in place.
* Conducted UAT (User Acceptance Testing) before deploying the product.
* Documented the user manual for facilitating the end users.

**Environment & Tools:** MS Office 2007, Rational Requisite Pro, Microsoft Visio, UML, MS Project professional 2007.

**Aetna Inc, Hartford, CT Oct’08 – July’10**

**Business Analyst**

Aetna offers a broad range of traditional and consumer-directed health insurance products and related services, including medical, pharmacy, dental, behavioral health, group life and disability plans, and medical management capabilities and health care management services for Medicaid plans.

**Project Scope**: The project involved development of Member Estimator tool. It was a web-based tool available to customer via Aetna website. This tool would provide Aetna customer an ability to estimate their out of pocket expenses when they intend to seek specific healthcare services from providers.

**Responsibilities:**

* Analyzed the results of market research performed to understand the customer needs.
* Conducted detailed and comprehensive Business Analysis by working with web portal business team and other stake holders to identify the system, operational requirements, and proposed tool features.
* Facilitated Joint Application Development (JAD) sessions with IT group members for communicating & managing expectations and to discuss various means for integrations with current system using an adoption through execution strategy.
* Worked with business and technical team of enterprise data warehouse to identify the source of data assimilation and integration.
* Co-authored Business Requirements Specification (BRS), Use Case Specifications, Systems Requirement Specification (SRS) and Change Request along with the Business Group and the IT project group members.
* Identified all necessary Business and System Use Cases from requirements, created UML diagrams including Use Case Diagrams, Activity Diagrams, and Sequence Diagrams using Microsoft Visio.
* Prepared user interface mock-up screens and participated in development of tool prototypes
* Reviewed the system design specifications and identified design gaps.
* Understood the Business Logic, User Requirements and test-objectives to develop Test plans, Test cases, Use Case Scenarios.
* Assisted in developing test scenarios, test scripts and test data to support unit and system integration testing.
* Involved in comprehensive testing of the system to check it satisfies functional specifications.

**Environment & Tools:** Rational Requisite Pro, Rational Clear Case, Rational Clear Quest, MS Office, MS Visio, HTML, Visual Basic 6.0, MS SQL

**Credit Suisse, Manhattan, New York July’07 – Sep’08**

**Business Analyst**

Credit Suisse is a leading global financial services company, offering clients financial advice in all aspects of private banking, investment banking and asset management.

**Project Scope:** The project was to upgrade the company’s website so as to support the bond trading amongst the client and banks, trading officers, legal department etc. The main purpose was to streamline exchange and approval of the documents and reports during the trade initiation process. Based on a Service Oriented Architecture (SOA), the integration program was designed to automate the creation that are the responsibility of Securitization Accounting and will provide reports for the validation and reconciliation of those entries.

**Responsibilities:**

* As Business Analyst part of the development team I was involved with the enhancement & upgrade project of the existing website with the addition of two different web-enabled modules –Documentation Sharing and Approval System and Transaction Status Report Generation.
* Used the guidelines and artifacts of the Rational Unified Process (RUP) to strategize the Implementation of Rational Unified Process effort in different iterations and phases of the Software Development Life Cycle.
* Prepared and analyzed AS IS and TO BE workflow scenarios, designed new process flows and documented the business process and various business scenarios, activities of the business from the conceptual to procedural level.
* Obtaining a thorough grasp of the business process that is being followed in the project environment.
* Involved in gathering and documenting the requirements that were critical to the business process and using those requirements to design application software using a Use Case approach.
* Extracting the business requirements from the end users keeping in mind their needs for the application and managing them using Rational Requisite Pro with the help of Blueprint requirement.
* Elicited demands from the stakeholders and analyzed them for consistency, flexibility and completeness.
* Extensively involved in System performance measurement and Client reporting.
* Prepared Business Workflow models that cover "How" business processes are accomplished.
* Used Microsoft Visio for complete process modeling using UML to create Use Case diagrams, Activity diagrams, Sequence diagrams and Process Flow diagrams. Extensively involved in writing use cases to narrate the functionality of the application.
* Played a substantial role in the process identification, definition and functional requirements gathering, in an effort to develop a practical technology solution.
* Involved in converting the User requirements into business requirements, functional requirements
* Used Rational Clear Case as a Configuration Management Tool.
* Non-technical specifications included creating proper documentation and clear illustration of the requirements for the benefit of Project management, subject matter experts and test users.
* Mainly used Test Director for bug tracking and Reporting and also for reporting defects.
* Extensively involved in User Acceptance Testing (UAT).

**Environment & Tools:** Windows, Oracle 9i, SQL, Microsoft Office suite, Rational Requisite Pro, MS Visio, Rational Unified Process (RUP), UML, Blueprint requirement.

**TD Ameritrade, Jersey City, NJ July’06 – Jun’07**

**Business Analyst**

TD Ameritrade provides brokerage subsidiaries, combines innovative trading technology, easy to use and understand trading tools, investment service, investor education and outstanding client service to create the ultimate financial services experience.

**Project Scope:** The project was to consolidate all portfolio management activity into a central workspace with top-down asset allocation and model building tools. The Application was created to ease the operations of the Portfolio Manager.

**Responsibilities:**

* Captured and analyzed requirements through JAD Sessions and Interviews with stakeholders.
* Project was implemented using the Rational Unified Process (RUP) Methodology to produce artifacts in the different phases of the Software Development Life Cycle (SDLC).
* Managed meetings and reviewed documents with the concerned teams.
* Accumulated business requirements from various business users and translated them into business requirements document.
* Documented all the discussions, stored the requirements and tracked the changes maintaining the updated versions of document.
* Lead business initiatives including brainstorming on new functionality for current systems.
* Created use case scenarios and documented workflow and business process.
* Developed use case diagrams, activity diagrams and sequence diagrams with Rational Rose.
* Created wireframes and screenshots for the application to easily communicate it to the Portfolio manager using MS Visio to assist development and engineering in understanding the requirements.
* Created and maintained complete requirement development plans that included functional specifications, requirements engineering, Use Case modeling, risk assessment and mitigation, internal and external workflow.
* Participated in writing test cases and test plans for the given scope items.
* Prepared Testing Methodology for Black box testing.
* Conducted UAT to make sure that all the business requirements were catered to the application.
* Ensured the application was tested for functionality and was adequately managed in production environment.

**Environment & Tools**: MS Office Word, Excel, Access, Visio, Rational Requisite Pro, Rational Rose, ERWIN 4.5, UNIX, SQL, PL/SQL.

**H.S.B.C, McLean, VA Apr’05 – Jun’06**

**Business Analyst**

H.S.B.C is the world’s largest banking group. The business ranges from personal finance and commercial banking, to private banking, consumer finance as well as corporate and investment banking.

**Project Scope:** This project was to build an application for automatically processing various types of credit applications based on applicant’s preferences and credit card issuance policies. I was involved in managing the requirements, to convert the tedious time consuming manual operations to automated operations. This application supports the FICO score retrieval and its simulation under different business scenario. It also calculates and predicts the associated risk factors and suggests the credit card issuance decision.

**Responsibilities:**

* Worked with Business Users to gather Business Requirements and Functional Requirements.
* Performed Stakeholder’s Requirement Analysis to identify the key players for project success.
* Participated in Stakeholder Management to communicate effectively with the right stakeholders
* Performed Project Leader responsibilities and hugely responsible for allocation of work amongst team members.
* Involved in project management activities, like project planning, development and execution.
* Defined specifications in Rational Rose through Use Cases/diagrams, Conceptual Model, Behavior diagrams (sequence, collaboration, state chart), Class Diagrams.
* Identified and involved all key stakeholders, contributors, business, operations and technical resources that must participate in projects and ensure that contributors are motivated to complete assigned tasks within the parameters of the project plan.
* Facilitated JAD sessions for communicating and managing expectations with the final users of the product.
* Scheduled meeting with developers and SAs (System Analyst) and Testers to collaborate resource allocation.
* Created Use Cases using UML and managed the entire functional requirements life cycle using Rational Unified Process, Requisite Pro Suite.
* Created Process Work Flow, Functional Specifications, and responsible for preparing Software
* Requirement Specifications (SRS), Functional Specification Document (FSD).
* Created and managed project templates, Use Case project templates, requirement types and traceability relationships in Requisite Pro.
* Created product documentation, including online help, printed user manual, and training materials.
* Exported reports into formats like PDF, HTML, EXCEL and WORD for users.

**Environment & Tools**: MS Visio, UML, Rational Rose, Rational Requisite Pro, RUP, Win Runner, Load Runner, Microsoft.Net, PL/SQL, MS Office, MS-Project, Windows 2000, Crystal Reports, Oracle 11i.

**GE Money, India July’04 – Mar’05**

**Junior Manager, Credit Management**

GE Money is a leading financial services provider adding value to various needs of individual customers. The company has been working in a joint venture to offer financial services. The company has a wide range of consumer lending products to meet individual needs and offer customized products to individual consumers and retailers.

**Responsibilities:**

* Customer relationship management.
* Provided statement of accounts and loan management information to customers.
* Helped customers settle foreclosures and maintained customer database.
* Performed diverse, advanced and confidential administrative support functions including composing, signing and releasing routine but somewhat complex correspondence.
* Managed a number of different and often conflicting objectives, projects or activities at one time.
* Communicated with executives and line management to gather or convey relevant information.
* Involved in high-level client contact and exposure to sensitive information.
* Performed diverse, advanced and confidential administrative support functions.
* Consulted with managers and associates via telephone to resolve complex HR-related issues.
* Independently managed cash transactions for all the major businesses — Vehicles, Consumer Durables and Personal Loans.
* Maintained financial systems and databases, and trained new employees.
* Strong communication skills - ability to communicate clearly and concisely verbally and in writing.
* Ability to multi-task effectively, perform well under pressure and meet tight and changing deadlines.