Sohail Siddiqui

(713) 459-7600

[sohail.sid@gmail.com](mailto:sohail.sid@gmail.com)

<http://www.linkedin.com/in/sohail-siddiqui-ba-713-459-7600>

5x certified: SFDC Admin, App Builder, Developer, Sales Cloud and Service Cloud

Over 12-year experience in Salesforce com CRM Platform

Experience in translating the customer’s requirements using SFDC best practices and crafting a solution that support their process and functional requirements

Developed customized solutions within the Salesforce platform to support business functions, meet project objectives, client requirements and company goals

Experience in Salesforce Customization, Data Validation, Sales, Marketing, Customer Service and Support Administration

Requirements gathering, Design, Business process flows, Business process modeling, Analysis, Development and Documentation

Expert in generating and analyzing Custom reports and Dashboard for management and various business unit personnel to provide detail information on key performance indicators

Excellent facilitation skills in conducting walkthroughs, surveys, questionnaire, customer interviews, marketing the product and advertising results analysis

Extensive exposure to Smoke testing, Usability testing, End-to-End testing, System testing, Regression testing and User Acceptance testing (UAT)

Worked on various salesforce com standard objects like Accounts, Contacts, Opportunities, Products, Price Books, Cases, Lead case management (Web-to-Lead, Email-to-Case), Campaigns, Reports and Dashboards

Experience on Sales Cloud, Service Cloud and Marketing Cloud

Process Builder and Approval Processes for automated alerts, field updates & Email generation according to requirements

Proficient in Bulk Data Migration, Data Validation, Sales, Marketing, Customer Service and Support Administration

Provided ongoing salesforce.com maintenance and administration services including periodic data cleansing, custom objects.

Used **Agile Accelerator**, **Jira**, **ServiceNow**, **Vantive** and currently using Salesforce for Case Management/Incident Management

**Experience:**

**Scholastic, New York**  Sep 2023 – July 2024

Senior Technical Business Analyst

Backlog Management**:** Maintained the backlog, monitored the daily queue, and separated user requests from system enhancements

Requirement Gathering: Collected requirements, communicated with users/requestors, refined stories, and prioritized requests

Collaboration and Assignment: Discussed requests with the technical team and assigned tasks using Kanban or manually, based on developer/admin availability and skills

End-to-End Management**:** Managed requests from development to testing across different sandboxes and in Production

Meetings: Conducted pre-deployment and post-deployment meetings, as well as retrospectives

Documentation**:** Wrote and maintained technical and functional specifications to document database intentions and requirements for future reference

System Audits and Upgrades: Performed regular internal system audits and prepared for upgrades and backups

Industry Standards**:** Familiar with business process mapping and gap analysis, prepared solution options, identified risks, and conducted financial analyses (eg, cost/benefit, ROI, buy/build)

Daily Administration: Managed daily administration of multiple profiles, roles, and user setups, including customization of objects, fields, Record Types, Page Layouts, Validation Rules, Flows, Triggers, Approval Processes, and Data Loads

Daily Administration: Managed daily administration of multiple profiles, roles, and user setups, including customization of objects, fields, Record Types, Page Layouts, Validation Rules, Flows, Triggers, Approval Processes, and Data Loads

Service Cloud Enhancements: Set up SLAs, Assignment Rules, object-level security, FLS, and email templates for user responses Created Help articles for both the team and users to minimize case influx

Page Layout Enhancements: Improved the Case Page Layout to gather related information, connect user request history, and suggest relevant Help articles based on requests

Agile Methodology: Worked on JIRA, utilizing Agile 2-week sprints

**Hancock Whitney Bank LA**  Oct 2021 – Sep 2023

Sr Salesforce BA/Admin

As a Senior Business Analyst, I successfully completed numerous enhancement requests, including but not limited to:

* Developing and optimizing Record Types and Page Layouts
* Creating and updating Permission Sets and Permission Groups
* Transitioning functionality from Workflows to Flows

In my role as a Technical Business Analyst, I led the integration of Service Cloud projects with Salesforce utilizing REST/SOAP APIs, Apex, and Lightning Components. I customized Service Cloud to support business processes, including the creation of custom objects, fields, and Flows.

I adhered to Agile methodologies, specifically Agile Accelerator and Kanban boards in Salesforce, and worked within two-week sprints. My responsibilities included:

* Interacting with business stakeholders, guiding them through new or enhanced processes, writing help articles, and providing comprehensive training
* Troubleshooting existing Salesforce functionalities and managing support tickets arising from business needs
* Conducting user training sessions, sharing screens, and resolving issues

I managed daily administration tasks for multiple profiles, roles, permissions, and user setups. This included customization of objects, fields, record types, page layouts, validation rules, process flows, triggers, approval processes, and workflow rules.

Configured client requirements into salesforce CPQ design, leveraging best practices and minimizing the need for custom development.

Furthermore, I wrote test scripts and conducted testing in SIT and UAT sandboxes prior to deployment to ensure the robustness and reliability of new features.

**JP Morgan Chase March 2021 – October 2021**

Salesforce BA

I was responsible for resolving internal users' issues, including those related to Reports and Dashboards, Data Loads, and the assignment of Profiles, Roles, Permission Sets, and Public Groups. My key responsibilities included:

Collaborating with internal business areas to gather end user requirements, ensuring a comprehensive understanding of various processes, offerings, and practices to address issues and implement enhancements effectively.

Proactively identifying areas for improvement and introducing innovative recommendations by considering customer needs, external approaches, data analytics, and industry best practices.

Participating in Scrum planning, release management, testing, and validation processes.

Implementing pick lists, dependent pick lists, lookups, master-detail relationships, validation rules, and formula fields for custom objects.

Utilizing sandbox environments for testing and migrating code to deploy instances post-testing.

Working with Salesforce Conga Composer and Conga CLM to customize contracts based on quantities, region, and discounts, enabling sales representatives to quote prices quickly and accurately.

Creating user investment contracts using Conga Composer.

Operating within Agile methodologies, specifically utilizing the Kanban approach.

**Abbott Pharmaceuticals/Labs St Paul MN Aug 2019 to Feb 2021**

**Salesforce Lightning Admin/Business Analyst**

**Lead - South Africa and India/Korea Zones**

Key Collaborations: Regular interaction with Deloitte as a Business Analyst, contributing significantly to the development and enhancement of multiple Salesforce.com (SFDC) instances.

Scrum Team Involvement**:** Integral part of the Scrum team, collaborating with functional leaders, organizational units, and subject matter experts to design, build, and implement Salesforce solutions supporting business processes.

Agile Methodology: Utilized Agile methodology for system enhancements, including daily scrum meetings, sprints, and reviews.

Technical Solutions: Designed and developed large, complex technical solutions for both Sales Cloud and Service Cloud.

System Audits and Upgrades: Conducted regular internal system audits and prepared for upgrades.

Data Management: Led data loading efforts (e.g., Price Book) as per requirements.

Administration Management**:** Managed daily administration of profiles, roles, and user setups, including customization of objects, fields, record types, page layouts, validation rules, process flows, triggers, approval processes, and workflow rules.

Security Maintenance: Ensured Salesforce security through internal settings, activity audits, sharing rules, permission sets, roles, and profiles.

Reporting**:** Developed and maintained reports and dashboards for users across all organizational levels.

Customer Support**:** Managed the support cases/ticket queue and troubleshot daily customer issues using ServiceNow and Salesforce Cases.

Documentation: Authored knowledge articles for sales associates to meet and exceed SLA standards and ensure process standardization.

**Calgon Carbon Inc A Kurary Company (Japan)**

**Abeam Consulting (Japan) Pittsburgh, PA Jan 2019 – July 2019**

**Business Analyst/SF Sr Salesforce Admin (Implementation)**

Worked on all the phases of Salesforce Lightning Implementation from requirement gathering to discussing with the HQ (Tokyo, Japan) for configuration of *Salesforce Lightning* create custom objects Fields, Fields Dependencies, Page Layouts, Record Types, Process Builders, Change Sets for deployment, testing, training and documentation

Understand business and propose the best implementation using the SFDC solution

Conduct requirements and solution concept workshops

Admin for Conga, DocuSign, Concur, and various other third-party integrations

Worked on Apttus CLM and later Conga CLM customized contracts and designed templates

 Provide support of the Salesforce environment, especially related to declarative applications, user permissions, security settings, custom objects, and workflow rules

Demonstrate thorough understanding of business process by documenting requirements, end to end process flows

Worked on Jira, 2 weeks sprint cycle with Agile methodology

**Charter Communications/T W Cable/Spectrum Communications Oct 2017– Jan 2019**

**Business Analyst/SF Admin**

**HQ Stamford, CT**

Troubleshot customer issues with customers via email, IM Skype or phone

Wrote Knowledge articles for sales associates as well as walk them through step by step

Work on various Salesforce standard objects like Accounts, Contacts, Cases, Leads, Campaigns, Reports and Dashboards

Assisted integration of Salesforce apps such as Rollup Helper and Campaigns as well as 3rd party applications including Informatica, Conga CLM

Conducted data migration and synchronization, ensuring high data integrity

Worked as a Conga and Adobe EchoSign as an admin, I Added and removed users, modifications of documents and layout

Added users, created quotes and agreements to facilitate users to accelerate sales

Worked on Service Cloud and Sales Cloud and Marketing Cloud

 Managed email campaigns on the Salesforce Marketing Cloud platform, including setup, testing, deployment, and reporting.

Worked on Web to Case and Email to Case and met the SLA Find a solution for sales associates regarding Leads, Opportunities, and Accounts etc Provide solutions of their complex queries

Worked with Omni Channel for case distribution based on the analyst skills and job requirements as well as meet or exceed SLA expectations

**PROS Consulting Houston, Texas Oct 2015 – Sep 2017 Salesforce Administrator/Marketing**

Participated in Requirement Gathering Sessions and developed several Custom Objects as specified in the scope document Created Custom fields, pick lists, field dependencies and validation formulas to the custom objects Performed the detailed analysis of functional and technical requirements; designed &deployed the custom objects; identified the lookup and master-detail relationships; and created the junction objects Demonstrated ability to translate customer requirements into specification

Implemented Email-to-Case, Web-to-Case entry and manual case entry for entering customer’s cases in Cases Tab

Created page layouts, search layouts to organize fields, custom links, related lists, and other components on record pages

**Spectra Energy Sep 12 – Oct 15**

**Salesforce Administrator/BA**

Automated sharing rules whenever there is a new change in Sales teams instead of using an Apex trigger

Worked with various Salesforce.com objects like Accounts, Contacts, Leads, Campaigns, Reports, and Opportunities

Created page layouts, search layouts to organize fields, custom links, related lists and other components on record detail pages and edit pages

**Education and Certifications:**

MCSE Houston, Texas

CCNA and CCDA Houston, Texas

Completed SAP HANA training Houston, Texas

Completed SQL Server training Houston, Texas

Computer Science Institute of Computer Science

Accounting and Economics University of Hartford, CT

Business Law 1&2 Manchester Community College, CT

Masters of Science (Mathematics) University of Karachi

**Additional Information**

US Citizen and Bilingual