Vedant Srivastava

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**Summary**

* 5 years of experience as a Business Analyst in all phases of Software Development Life Cycle (SDLC), including Business Requirements Gathering, Documentation, Use Cases, Functional Specification, Business Case Analysis, Project Management, Quality Assurance (QA) and Testing (Manual & Automation).
* Highly proficient in working with business users to gather requirements, analyze them and subsequently use the **Rationale project** and design tools to model the requirements.
* Conducted JAD sessions, interviews, and brainstorming sessions, created Use Cases, workflows, screen shots and Power Point presentations for the Web Applications.
* Experienced in performing SWOT analysis, GAP analysis, impact analysis, Cost/benefit analysis, A/B testing leading to the development of functional specifications and project planning.
* Proficient in SQL querying, data manipulation and excellent knowledge about Data Visualization and Business Intelligence tool like Tableau for creating reports such as Ad-Hoc, Heat Maps, Tree Maps and Bar Graphs.
* Excellent understanding and experience working in different Software Development methodologies such as Waterfall, Agile (Scrum, Kanban) & Hybrid (Waterfall-scrum) and experienced in Scrum process implementation.
* Expertise in Salesforce CRM and ability to drive business growth through effective utilization of the platform.
* Configured and customized Sales Cloud modules within Salesforce to optimize sales processes and enhance user experience.
* Confident, accurate, decision-making abilities coupled with excellent communication and interpersonal skills.
* Instrumental in the identification and resolution of financial, business, or technical issues.

**Certifications**

* Salesforce BA certification.
* Advance Google Analytics.
* Omnichannel Marketing Virtual experience program.

**Experience**

**Emblem Health, New York, NY January 2023 – Present**

**Salesforce Business Analyst**

Emblem health is New York’s leading neighborhood health insurance and wellness company. It is one of the United States’ largest non-profit health plans. It is a regional carrier offering medical, vision and dental coverage primarily in the south-east New York area. As a Business Analyst, I played a crucial role in orchestrating the smooth integration of Salesforce CRM, particularly utilizing Sales Cloud functionalities, with Medicare enrollment processes. The goal of this project was to streamline the enrollment workflow, elevate data accuracy, and enhance overall efficiency in managing Medicare-related activities.

Responsibilities

* Engaging with key business stakeholders daily via JAD sessions, focus groups, brainstorming and emails to gather, analyze and validate software requirements/business rules and ensure alignment with the functional/technical requirements.
* Ensured strict adherence to federal and state regulations governing Medicare enrollment processes, maintaining compliance with industry standards.
* Developed and delivered training programs for sales teams to promote effective use of Sales Cloud features and increase user adoption.
* Created process maps and workflow diagrams to visualize and optimize business processes within Salesforce CRM.
* Proficient in Salesforce administration, including user management, security settings, and customization to align with business processes.
* Negotiating and liaising between business teams, support teams and technology teams to develop the business architecture including the scope, processes, and risks.
* Documenting the requirements into understandable Use cases, User stories and Data model diagrams. Used JIRA for user story management, defect, and sprint cycle tracking.
* Collaborated closely with sales, marketing, and customer service teams to understand their needs and optimize Salesforce accordingly.
* Created detailed process maps and documentation for Medicare enrollment processes, providing clarity for stakeholders and supporting continuous improvement.
* Coordinated integrations between Sales Cloud and other business systems, ensuring seamless data flow across the organization.
* Tracking and analyzing the sprint burn down chart to estimate the sprint velocity to achieve the sprint goal.
* Creating process flows, UI mockups, wireframes, and flow charts for the enrollment application interface in salesforce and business user friendly dashboards
* Collaborated closely with Scrum Masters to ensure seamless communication and coordination within Agile teams.
* Identifying the gaps between the compatibility of the existing portals and the newly developed system and preparing an action plan for the migration
* Collaborated with cross-functional teams, including legal, compliance, and IT, to gather requirements and ensure a streamlined Medicare enrollment workflow.
* Developed detailed user stories and acceptance criteria for Salesforce CRM enhancements based on stakeholder needs.
* Coordinating with team members to conduct sprint review meetings and abstraction calls as part of the agile working methodology.
* Led the customization and configuration of Sales Cloud to align with specific business requirements, optimizing the platform for enhanced sales performance.
* Orchestrated integrations between Salesforce and other business applications, ensuring seamless data flow.
* Proficient in creating and managing epics and themes in Jira to provide a high-level view of project progress.
* Assisting project manager to meet deadlines through status meeting, daily scrum calls, weekly reports, identifying risks and tracking issues.
* Developed data migration strategies for seamless transition and integration of data into Salesforce CRM.
* Designed and implemented effective data models within Sales Cloud to ensure accurate representation of sales processes and facilitate data-driven decision-making.
* Interacting with the QA team in functional, regression, integration, user acceptance (UAT) and performance testing to make sure the client’s needs are met. Preparing UAT test scenarios and test cases
* Presenting end to end process flow demos of completed products to the product owners.
* Conducted in-depth analysis of user requirements to identify opportunities for process optimization and efficiency gains in the Medicare enrollment system.
* Working with training folks to prepare and review the training documentation.

**Webster Bank, Waterbury, CT**

**January 2022 – December 2022**

**Business Analyst**

Webster is a US commercial bank which promotes better banking and smarter financing. The project’s scope was to build an Integrated Online Portfolio Management System, which encompasses an individual’s Bank Accounts, Credit Cards, Loan Accounts, Investments and Mortgage. This Online Portfolio system helps the users to access all the financial accounts on one page and get real time balances for each account. This helps the bank to suggest a more comprehensive offering to its clients and propose different options for loans, credit cards and other financial marketing programs.

**Responsibilities**

* Interacted with the executives and software development team to liaison the business requirements to ensure that the proposed upgraded application complies with the business requirements.
* Conducted in-depth analysis of business requirements related to mortgage processes, collaborating with stakeholders to define and document specifications.
* Conducted comprehensive requirements gathering sessions with stakeholders to understand their needs and expectations for the Portfolio Management System.
* Implemented automation solutions within mortgage processes to streamline workflows, reduce manual errors, and enhance overall efficiency.
* Facilitate Agile ceremonies such as sprint reviews, retrospectives, and daily stand-ups within the Jira environment.
* Performed GAP analysis for new functionality requirements as well as prioritized them based on actual business needs.
* Collaborated with portfolio managers, investment analysts, and other stakeholders to define business requirements and ensure the Portfolio Management System aligned with strategic goals.
* Facilitated JAD sessions and conducted peer review meetings periodically to keep track of project’s milestones.
* Analyze agile metrics within Jira, including burndown charts and velocity reports, to evaluate team performance and project health.
* Identified opportunities to use customer data to develop customer strategies and improve business performance.
* Orchestrated integrations between the Portfolio Management System and other financial systems to ensure accurate and seamless data exchange.
* Utilized data analysis tools to assess mortgage portfolio performance, generating reports that informed decision-makers about key metrics and trends.
* Assisted the project manager in preparing the project schedules, milestone tracking, and resource allocation using MS Project
* Analyzed existing portfolio management processes, identified inefficiencies, and implemented optimizations to enhance overall workflow.
* Implemented risk management features within the Portfolio Management System, enabling stakeholders to assess and mitigate risks associated with investment portfolios.
* Ensured compliance with regulatory requirements and industry standards in mortgage processes, minimizing legal and financial risks.
* Organized weekly project status meetings and created power point presentations and project updates using MS Project for management review.
* Effectively coordinated with the scrum team daily in maintaining and prioritizing product backlogs
* Developed and implemented robust data models within the Portfolio Management System, enabling effective analysis of investment performance and risk.
* Responsible for preparing a formal FRD and coordinated with the dev team in understanding the same.
* Collaborated with the QA team to ensure adequate testing on software, maintained quality procedures, and ensured that appropriate documentation was in place.

**SKYGDP & Associates, India**

**Financial Analyst (Salesforce**

**September 2017- May 2021**

Quicken Loans is the nation’s leading mortgage lending company that is headquartered in Michigan. The primary goal of this organization was to centralize the overall loan lending process of America which was fragmented due to the varying regulations across the country. In this effort, the traditional mortgage approval process was made paper-free and completely online. The project’s objective was to build a mortgage loan underwriting platform that will facilitate faster turnaround times for making underwriting decisions.

**Responsibilities**

* Used mortgage industry knowledge to develop a streamlined process for various business segments that will reduce the turnaround time in mortgage lending procedure.
* Developed and delivered training programs for mortgage professionals, ensuring they were proficient in using systems and adhering to established processes.
* Conduct regular backlog grooming sessions in Jira, collaborating with cross-functional teams to refine and prioritize user stories.
* Primary liaison between product owner, services team, UI development team, and other stakeholders
* Coordinated communication across various work streams and translated business and functional requirements in agile-scrum user stories.
* Coordinated integrations between mortgage systems and external databases or financial platforms to facilitate seamless data flow and enhance overall system functionality.
* Conducted daily SCRUM meetings and sprint review meetings during the Sprint Development as a part of Agile Methodology
* Worked daily with primary stakeholders or delegates to gather and document functional requirements such as business rules for task prioritization, task routing rules etc.
* Implemented risk management measures in mortgage processes, conducting risk assessments and proposing mitigation strategies.
* Primary BA to create process flows, use case briefs, detailed use cases and to perform impact analysis.
* Extensively involved in the formal documentation of the functional requirements.
* Documented end-to-end mortgage processes, creating process maps and detailed documentation to support training, audits, and continuous improvement initiatives.
* Generate and interpret reports in Jira to track project progress, velocity, and identify areas for improvement.

**Education**

**Clark University School of Management**, Worcester, MA

Master of Science in Marketing Analytics

**Thakur College of Science and Commerce,** Mumbai, India

Bachelor’s degree in Business