S Venkateswara Rao
- Phone: 9347306766
- Email: srvrao1992@gmail.com
- Location: Visakhapatnam, Andhra Pradesh

PROFESSIONAL SUMMARY

Salesforce Admin/Developer with over 3 years of experience in the **Property & Casualty (P&C) insurance** industry. Expertise in customizing, developing, and managing Salesforce environments to optimize insurance workflows such as claims processing, underwriting, and policy administration. Proficient in both **administrative tasks** like user management and security, and **development tasks** like building custom applications, Apex triggers, and integrations. Proven ability to lead cross-functional projects, improve business processes, and deliver tailored Salesforce solutions.

TECHNICAL SKILLS

- **Salesforce Administration:** Profiles, roles, security settings, workflows, Process Builder, Flows, page layouts, record types, data migration, reports, dashboards
- **Salesforce Development:** Apex, Visualforce, Lightning Web Components (LWC), SOQL, SOSL, REST/SOAP APIs
- **CRM Platforms:** Salesforce Sales Cloud, Service Cloud, Experience Cloud
- **Integration Tools:** Mulesoft, Informatica, Zapier, Salesforce Connect
- **Languages:** Apex, JavaScript, HTML, CSS, SOQL
- **Data Management:** Data Loader, Import Wizard, Duplicate Management
- **Methodologies:** Agile, Scrum

PROFESSIONAL EXPERIENCE

Project Name: Rating & Salesforce Integration for Insurance Quote Processing
Role: SFDC Business Analyst/Administrator
Sage Innovations Pvt. Ltd. – Visakhapatnam, Andhra Pradesh
March 2021 – September 2022
Responsibilities:
- Collaborated with business stakeholders to gather requirements, design solutions, and ensure Salesforce systems align with insurance business needs
- Creating and managing Users, Roles, Profiles and setting up sharing rules
- Interacting with business operations, understand business model, involved in gathering requirements, communicated business process, and translated needs into salesforce terms
- Preparing process flows by using Visio & Miro and documents to explain the requirement and process to development team and stakeholders
- Assisting in entering and updating Issues (Epics, Stories, and Tasks) onto JIRA Agile application
- Designed and configured account forms for account creation for specific users
- Creating objects, fields, email alerts, reports and dashboards etc.,
- Worked closely with developers in case of concerns/questions regarding the requirements
- Conducted data migration and cleaning projects using Data Loader to ensure accuracy during Salesforce to Applied EPIC integration
- Developed custom objects, validation rules, and page layouts tailored to meet the specific requirements of the application
- Writing SOQL Queries to research backend data and for performing data validations through workbench

Project Name: Automated Policy Submission & Claims Management
Role: Salesforce Technical Support Engineer
Sage Innovations Pvt. Ltd. – Visakhapatnam, Andhra Pradesh
September 2022 – Present
Responsibilities:
- Created complex **reports and dashboards** to provide actionable insights to agents, account managers and claims adjusters, improving visibility and decision-making
- Designed **workflow rules** and **validation rules** to ensure compliance with P&C insurance regulations and improve data quality
- Developed and customized **Apex classes, triggers, Visualforce pages**, and **Lightning Web Components (LWC)** to automate and streamline **new business submissions**, **claims processing**, and **underwriting workflows**, as well as manage the **policy lifecycle**, including **quotes**, **binding**, and **renewals**
- Built and customized **Lightning components** for enhancing user interfaces and improving the user experience for agents and account managers
- Created a **custom Flow** for automating the new submission approval process, reducing manual intervention and improving processing time by 30%
- Developed custom **LWC components** to allow agents to view real-time policy data on their Salesforce dashboard
- Automated data syncing and quote validation through **REST APIs**, reducing processing errors by 40%

Team Lead - Operations
Patra India BPO Services Pvt. Ltd. – Visakhapatnam, Andhra Pradesh
Jan 2016 – March 2021
- Started career as Process executive in 2016 and got promoted to Team lead in 2018
- Awarded with best process executive twice
- Handling a team of 30 FTEs
- Developed SOP's as per the guidelines
- Prepared training plan and content for new hire including validation and ramp up plans
- Led a team of operations analysts in providing support to clients
- Monitored team performance and provided feedback to team members
- Coordinated with other teams to ensure smooth operation of the company
- Created process improvements that reduced the team's processing time by 20%

EDUCATION
- 2013 – B. Tech in ECE from TP Institute of Science & Technology, Bobbili
- 2009 – Intermediate from Sadhana Junior College, Visakhapatnam
- 2007 – SSC from Ramakrishna Public School, Visakhapatnam

ADDITIONAL SKILLS
- Deep understanding of P&C insurance processes including claims, underwriting, policy management, and compliance.
- Strong project management skills with the ability to lead multiple projects and teams.
- Exceptional problem-solving skills and the ability to translate business requirements into technical solutions.