

# SHAMS UL ARFEEN

---

## Contact:

Call/SMS/WhatsApp: +923331542230

Email: [toarfeen@gmail.com](mailto:toarfeen@gmail.com)

[Linkedin](#) | [onSkip](#)

## Profile Summary

Results-driven Analyst specializing in automating processes to enhance business workflows and optimize data accuracy. Building on a foundation in Finance and an education in Project Management, I transitioned from banking to CRM and then to commercial finance. Currently managing revenue recognition management for new business and renewal deals, ensuring compliance and data integrity during the Salesforce CPQ migration. Technical expertise includes Alteryx, SQL, Python, Power BI, Smartsheet, and monday.com. Recognized for leveraging analytical insights to streamline operations, enhance automation, and contribute to organizational growth through effective collaboration across departments.

## Skills and Competencies

- Business Intelligence Tools: Proficient in Power BI, Excel, and SQL for data analysis and reporting.
- Commissioning: Experienced with XACTLY INCENT for commission management
- ETL and Data Integration: Skilled in Alteryx for efficient data extraction, transformation, and loading processes.
- Programming & Automation: Proficient in Python for data integration and automation of ETL processes.
- Project Management: Expertise in managing projects from concept to execution, with a focus on quality assurance.
- Data Visualization: Ability to create impactful visualizations that convey complex insights effectively.
- Report Automation: Proven track record in automating reports to enhance efficiency and accuracy.
- Communication: Strong stakeholder engagement and cross-functional collaboration skills.

## Experience

### SR. ANALYST COMMERCIAL FINANCE | PRESENT

- Managed revenue recognition for new business and renewal deals, ensuring accuracy and compliance with organizational policies.
- Led User Acceptance Testing (UAT) for various Salesforce functionalities, ensuring data integrity and optimal system performance.
- Collaborated with Order to Cash teams to maintain Salesforce data accuracy and consistency.
- Redesigned existing processes and created Alteryx workflows to prepare data from Salesforce and upload it to INCENT for commission purposes.
- Oversaw the reconciliation of Salesforce data from Lead to Cash, ensuring comprehensive data integrity throughout the process.
- Developed automated monthly reports sent to each sales representative for their review, enhancing communication and accountability.

## ANALYST COMMERCIAL FINANCE | S&P GLOBAL | JANUARY 2020 – DECEMBER 2022

- Oversaw the reporting and reconciliation processes for new business sales data, ensuring accuracy and transparency.
- Led a cross-functional team on Salesforce projects, facilitating User Acceptance Testing (UAT) and the development of Salesforce tools.
- Automated auditing processes using Alteryx, Smartsheet, INCENT, and Workday, enhancing efficiency and accuracy in data validation.
- Provided mentorship to junior analysts on data analysis techniques and software tools, promoting skill development and best practices.

## DATA RESEARCHER | S&P GLOBAL | DECEMBER 2018 – DECEMBER 2019

- Conducted financial data analysis and manipulation using Excel.
- Specialized in converting financial statements from PDF to standardized templates, ensuring accuracy and reliability.
- Maintained data quality and consistency, collaborating with team members.
- Provided online training sessions on Excel data manipulation techniques to a team of 250 members.

## ASSISTANT, FINANCE & ACCOUNTS | KSSL – ZTBL | FEBRUARY 2014 – DECEMBER 2018

- Managed journal ledger, trial balance, and financial reports.
- Implemented process improvements for operational efficiency.
- Coordinated with department heads to streamline financial reporting processes.
- Trained new team members on financial reporting standards and software usage.

## Education

- E-MBA (Project Management) | Preston University, Islamabad, Pakistan

## Certifications

- iLead Certified 2024
- Google Data Analytics Professional Certificate
- Smartsheet 2021 Core App
- Alteryx Foundational Micro-Credential
- Agile Project Management with Microsoft Project (2020)

## Technical Proficiency

- Data Analysis Tools: Alteryx, Power BI, Excel, Smartsheet
- Commissioning Tool: XACTLY INCENT
- Programming Languages: Python, SQL
- CRM Systems: Salesforce
- Database: MS Access, SQL

## Key Achievements

- Utilized Smartsheet forms for users to submit queries/requests and employed Python scripts to extract relevant data based on queries. Integrated with Microsoft Outlook to automatically deliver detailed email responses.
- Contributed significantly to Salesforce projects for Commercial Finance by assisting in tool creation, performing UATs, and ensuring smooth implementation of new functionalities.

- Automated an approval process for the Sales Support Team using Python and Smartsheet, implementing criteria-based logic for efficient workflow management.
- Collaboratively designed and implemented Milestone functionality in Salesforce to ensure accurate commission distribution.
- Co-designed a new opportunity product split object to ensure correct commission allocation, working closely with the project owner.
- Played a pivotal role in the seamless migration of Sales Data from ZOURA to CPQ Salesforce, ensuring data accuracy and integration across departments.
- Developed a robust Query Management system using Smartsheet to enhance data organization and accessibility company wide.
- Created real-time Power BI dashboards for multiple teams to monitor KPIs, integrating these dashboards with Microsoft Teams Groups.
- Implemented Alteryx workflows to automate data management processes, including weekly audits, commission data reconciliation, and employee data auditing between Workday and INCENT.