**Dishank Sadana**

**Business Analyst**

* Around 8 years of extensive experience as a Business Analyst in business and functional requirements gathering, analyzing requirements, data analysis, data mapping, business process re-engineering, object-oriented designing, unified modeling language (UML), SDLC methodology (RUP, Agile, SCRUM, XP) and project management in finance and investment banking domain, very good team player with excellent communication and presentation skills.
* Experienced in conducting joint application development (JAD) and Rapid application development (RAD) sessions.
* Well-versed in translating business requirements and user expectations into detailed functional specifications employing Unified Modeling Language (UML).
* Wide-ranging experience in Finance and Investment Banking industries.
* Extensive Scrum and Agile experience, user Storiesincluding blending Agile practices with existing processes as well as gaining executive and organizational support for transitions to Agile practices
* In charge of corporate bank financing for Capital or Business acquisitions.
* Extensive experience in web technology, infrastructure, content management systems (CMS), business process automation (BPA), Business process re-engineering (BPR) and data warehousing environment
* In-depth knowledge of the practices of private equity, financial tools and theories.
* Worked with the General Ledger to ensure that all transactional data conformed with GAAP standards
* Extensive use of Excel Macros and Excel Pivot tables for data manipulation.
* Provided support to Portfolio Managers on daily trades made using Bloomberg and our own business systems.
* Worked with sales team to maintain companies salesforce.com information.
* Worked extensively on trade settlement, clearance and portfolio update information for potential vendors.
* Generated portfolio analysis and P&L reports by performing reconciliation, risk analysis and risk management (Credit Risk, Market Risk, Reinvestment Risk, and Inflation Risk) based on the client investment objectives.
* Involved in the formulation and implementation of a structured credit policy and related processes to manage and monitor credit risk.
* Maintained daily correspondence with Portfolio Managers and Management to ensure the proper trajectory of Fixed Income and Cash allocations
* Sound experience in Manual Testing using Testing Tools like HPQC or Rational Tools, QTP.
* Worked on Agile methodology in almost all the projects.
* Guide consumers with financial decisions as a mortgage Business consultant
* Conduct mortgage financial and investment research and analysis to support our continued business development.
* Worked intensively in Capital and Derivative (future, options, forwards, swap) market, Arbitrage, currency and commodity markets.
* Experienced in constructing valuation models to undertake Cost/Benefit analysis.
* Expert in Financial Planning, Forecasting, Budgeting and utilization of variance analysis to manage project to completion on time and within budget.
* Highly proficient in developing and managing MS access and SQL server database for data entry, storage and generation of JaspersoftiReports to facilitate management decision making processes.
* Accomplished at UAT (user acceptance testing), Functionality Testing, Unit testing, System Testing, Integration Testing and Regression Testing.
* Ability to implore various negotiating strategies to gather resources for project implementation.
* Extensive experience with Data Warehousing, Extraction, Transformation and Loading (ETL) and Business Intelligence (BI) tools.
* Self-motivated, diligent, ability to adapt to new environments and situations quickly, good grasping ability, capable of forming and maintaining positive and productive working relationships.
* Excellent verbal and written communication skills combined with interpersonal and conflict resolution skills with strong analytical skills

**Technical Skills:**

|  |  |
| --- | --- |
| Requirements Gathering Tools | Rational Requisite Pro |
| Modeling & Designing Tools | MS Visio |
| Technical | SQL, HTML, XML |
| SDLC Methods | Agile, RUP, Waterfall, Scrum |
| Databases | SQL Server 2008 |
| Business Tools | Microsoft Visio and MS Office Suite |
| Operating Systems | Microsoft Windows( 2000, XP, Vista & 7) |
| Other Tools | Microsoft Project, TOAD, MS Office, MS FrontPage, Photoshop CS, SQL Server Management Studio, MS Sharepoint , BPMN, JaspersoftiReports |
| Finance | Hedging Techniques, Equity Analysis & Research, Portfolio Management, Capital &Derivatives (F&O), trade flows |
| Testing Tools | Load Runner, UAT, Automated Testing(QTP), Manual Testing, Black Box, White box |

**Infogix, Inc.**

**Naperville, IL**

**Business Analyst/Implementation Consultant June 2013 – Present**

Infogix offers a complete portfolio of software products and services to monitor, detect, and prevent information errors with their different tools like ASSURE, ACR, INSIGHT and PERCEIVE. Infogix Controls are independent, continuous, and automated. They can be deployed enterprise-wide across applications, platforms, and business processes.

Project focuses on reconciliation of data from different sources to company’s General Ledger (GL) account. Balancing Debits and Credits, validating input files, developing reports and dashboards.

**Responsibilities**

* Facilitated interview sessions to identify business rules and requirements and then documented them in a format that can be reviewed and understood by both business people and technical people.
* Created targeted Questionnaires for SMEs to gather requirements and analyze the business process model.
* Understood and articulated business requirements from user interviews and then converted requirements into functional specifications.
* Worked as assistant project manager, maintained all documents and meeting schedules.
* Conducted JAD sessions with Product, Operations and different team leads to analyze business requirements and functional system design.
* Created Business Requirement Document, Use Case Document, Detailed Requirement document, Process Flows, Test Scenarios and Requirement Traceability Matrix.
* Handled Mortgage financial clients.
* Understanding of Salesforce CRM for maintaining sales records
* Worked extensively on MS sharepoint for sharing different documents with team.
* Analyzed Business needs and capabilities to provide Contract Management Service to Providers by considering existing system functionalities and design.
* Trained Jr. Business Analyst with company’s documents and products.
* Followed Agile for financial clients and waterfall for healthcare clients.
* Facilitated daily Scrum Stand-Ups, sprint planning, sprint review, sprint demo.
* Implement Agile project management principles and methodologies by leading requirements gathering sessions, sprint planning, product backlog grooming, level of effort and estimation sessions
* Created BPMN graphical presentation for business process
* Used detailed knowledge of the application features and functionality to assess the scope and impact of business needs throughout the analysis and completion of the enhancement specifications.
* Developed and executed SQL queries for data extraction, manipulation and to view the data in the tables.
* Developed Functional and Non Functional Requirements, which included screen design and mockups.
* Gathered requirements for Reporting, which were developed to provide statistical analysis for the subscribed Providers.
* Facilitate SCRUM meeting as SCRUM Master in AGILE software development.
* Worked extensively on JaspersoftiReports to create reports and Dashboards for clients
* Conducted Requirement Inspection meetings with stakeholders and different team leads to verify and validate Requirement Documents obtain a Sign- Off.
* Acted as a liaison between Business and Development teams to verify if, the requirements were accurately met by constant interaction and daily scrum meetings.
* Prepare the Test Data and upload the input file into Mainframes
* Developed Test cases, Test scenarios, Test Scripts and Defect tracking,Execute Cases, Log Bugs/Defects in HPQC.
* Involved in UAT testing of the whole application and in batch jobs run
* Developed Test Scenarios and Test Cases for User Acceptance Testing and verified the Test Scenarios and Test Cases written by System Integration Testing Team
* Conducted weekly status calls with Third Party Vendors and Project Leads to keep track of events and progress on a weekly basis

**Environment: Agile, Waterfall, HPQC, SQL, Rational RequisitePro, Rational Rose, Rational ClearCase, Rational ClearQuest, Java, VISIO, HTML, UML**

# Ameriprise Financial Services, Inc

**Columbus, MS**

**Business Analyst June 2012-May 2013**

The Project focuses on enhancing the Trading system which acts as an interface between the investors and brokers and helps them in the trading of shares and bonds. The system is a web based application which is fully connected to both the trading engine and the bank authorities to facilitate successful and secure transaction. The application provides the investor with current updates of the stock market and facilitates the user (investor) in managing his/her portfolio. The application shows the data and market scenarios in the form of pie chats and bar charts for better understanding and readability.

**Responsibilities:**

* Worked on multiple stages of a project life cycle from formulating and defining system scope; analyzing existing system logic and operation; feasibility study, gap analysis, and developing recommendations for procedures to solve end user problems.
* Acted as a liaison between several groups within the business and technology to meet project deadlines and objectives with success.
* Understanding the need of customers and work on KYC (Know your Customer)
* Identified and developed portfolio solutions including capital and derivative investment management and stock option grants to advisory services for top level business executives.
* Directed the project using Rational methodologies and acted as an RUP consultant for the whole project life cycle.
* Experience in importing and exporting data from various sources like Microsoft Excel, XML and flat file using SQL Server
* Involved in finding bugs, testing and then log them and track the progress in HPQC.
* Contribute investment recommendations based on analysis and constraints
* Successfully improved the derivative trade process of clients managed by reducing the processing time of trade booking and increasing its accuracy which, improved controls and was instrumental in attracting more clients.
* Used BPMN for business process flow
* Good understanding of MS sharepoint as an internal project tool.
* Updated websites with proper information about settlement, clearance and trade information.
* Responsible for gathering, analyzing, and documenting business requirements; writing use cases (UML), functional and non-functional specifications based on information gathering sessions with business unit stakeholders and technical team members.
* Implement Agile project management principles and methodologies by leading requirements gathering sessions, sprint planning, product backlog grooming, level of effort and estimation sessions
* Worked majorly on agile methodology for updating the trading systems and generating prototypes as per the client’s convenience.
* Analyzed industry conditions, issuer strategies, historical and prospective measures of financial strength, earnings quality, Fixed Income, refunding risk, legal and regulatory contingencies, contractual relationships, and risk appetites.
* Intensive knowledge of Jaspersoftireports for reporting investments.
* Involved in GUI design, application architecture, components and reports design; identified internal/external application dependencies & available reusable interfaces.
* Defined the business logic in capturing and presenting holder’s information in the portal application.
* Performed system and integration testing to ensure conformance to project standards, performance criteria and functional specifications.
* Designed and developed Use Cases, Activity Diagrams, Sequence Diagrams, OOD using UML
* Played a key role in the planning, User Accepted Testing, and implementation of system enhancements and conversions.
* Lead the testing team and creating test plans, cases, scenarios, testing reports
* Established a business Analysis methodology around the Rational Unified Process.
* Researched the various steps in the lifecycle and then constructed the system in such a way that the riskier claims could be easily identified and monitored.
* Streamlined clerical work processes and mapped to the automated system.
* Developed project plans and managed scope.
* Assisted in building a Business Analysis Process Model using Rational Rose and Visio.
* Performed extensive Requirement analysis and developed use cases and workflows.

**Environment: Rational RequisitePro, Rational Rose, Rational ClearCase, Rational ClearQuest, Java, VISIO, HTML, UML, HPQC, Agile, SQL**

**Town and Country Bank**

**Stephenville - TX**

**Business Analyst May 2011 – June 2012**

The scope of the project is to maintain a Force Account system which is a web based system that facilitates opening new bank accounts, request for credit cards, check status of applications, establish recurring billing, and generation of reports in a decentralized fashion. The Force Account system is specifically designed to use only by military partners, Air Force Services and Army Community and Family Support Center. The service can be availed at any time and from any part of the world.

**Responsibilities:**

* Acquired comprehensive knowledge of Banking activities and operating processes.
* Collected and documented business processes as well as business rules.
* Participated in the identification, understanding, and documentation of business requirements, including the applications capable of supporting those requirements.
* Translated the business needs into system requirements, communicating with the business on a non-technical level, and with the System Analyst on a more technical level.
* Collaborated with development architect and the business to develop both high-level and detailed application architecture to meet the business needs.
* Highly involved in building equity trading application in Capital and Derivative (F&O) Market.
* Monitor fundamental economic, mortgage industry and developments by analyzing information from financial publications and services, banking firms and other mortgage companies.
* Highly worked on KYC to get the information about the customers.
* Performed gap analysis.
* Created, customized and migrated data from different sources (text files, Excel spreadsheets, Oracle, Flat Files, and Access) to SQL Server databases using SQL Server.
* Worked extensively on BPMN, UML designs for business users and developers.
* Work on trading platforms used by major banks for research and financial investments
* Managed development team using agile methodologies (SCRUM) to interact with team of management peers within business analysts, architecture, project management, test, and system engineering.
* Directed all corporate financial practices and supervised accounting team in AP and GL reconciliation
* Undertook Basel1 regulations for all bank transaction and liquidity issues.
* Created pricing models to assist in determining the quality of the Mortgage loans being sold.
* Maintained the entire portfolio database of all mortgage purchased loans.
* Produced weekly summary reports on the status of the acquired mortgage loans.
* Documented and delivered Functional Specification Document to the project team.
* Conducted User Acceptance Testing (UAT).
* Worked with iterative development environment using Agile Methodology.
* Responsible for complete oversight and portfolio analysis of $18 Billion on behalf of clients with assets across global taxable fixed income, municipal, international quant/fundamental equity, hedge fund
* Developed test scenarios and implemented test plan. Providing key input in working with users in defining project and system requirements.
* Implemented iterative testing using agile methodologies.
* Conducted project related presentations.
* Used HPQC for the Defect Management.
* Developed strategic partnerships with the business units to develop a solid knowledge base of the business line; including the business plan, products, and process and revenue streams.
* Documented and delivered Functional Specification Document to the project team.
* Conducted testing and defect correction activitiesand prepared test reports and metrics for each testing phase
* Conducted JAD sessions for communicating with Stakeholders and Project directors.
* Developed business requirement specification documents as well as high-level project plan.
* Assist the PM in setting realistic project expectations and in evaluating the impact of changes on the organization and plans accordingly and conducted project related presentations.
* Conducted benchmarking activities to identify best practices.

**Environment: UML, HTML, DHTML, JavaScript, CSS, RUP, Rational Requisite Pro, Agile, SQL, Rational Rose, VISIO**

**Religare Securities**

**Business analyst**

**Delhi, India Dec 2009- Jan 2011**

The scope of the project was to revamp the **web applications**, which enable potential customers to perform searches for mutual fund performance, Equity, stock ratings, bond and market performance and providing information regarding recent events related to the investments. It provides a clear and complete picture of the client’s asset allocation, current investment portfolio and full brokerage capability.

**Responsibilities:**

* Organized and facilitated meetings with the management and the development team, conducting requirements gathering sessions with the purpose of defining the functional business and system requirements.
* Performed extensive requirements analysis and requirement gathering including data analysis and GAP analysis.
* Worked extensively on Capital and Derivative instruments for investments.
* Responsible for producing net asset valuations (NAV) for more than 1,000 OTC and cleared derivative trades, (equities, swaps, & options) on a daily basis through trade processing and data mining for multiple funds valued over $1 billion
* Promoted the Agile process within the company, to include responsibility for expanding the understanding and practice of agile principles throughout the entire organization, including technology and operations teams, and the business
* Represented the teams in daily Scrum of scrums and appropriately escalated and tracked issues and blockers in order to bring right attention to the impediments faced by teams
* Conducted user interviews, Document Analysis and JAD sessions to reduce the Scope Creep and document analysis in requirements elicitation.
* Helped the organization in learning the agile process and implementing agile within their corporate environment
* Worked on all phases of life cycle using Rational unified process (RUP) methodology.
* Created Business Requirements Documents (BRD) and Functional Requirements Specifications (FRS) documents.
* Management of corporate investments to include financial analysis and regulatory  compliance with corporate partners.
* Creating and managing Project templates, Use Case project templates, requirement types and traceability relationships in Requisite Pro.
* Designed Use cases, Use case diagrams to present a better view of the system as a whole to the technical team for them to identify the key processes.
* Used MS Visio for flow charting, process model and architectural design of the application. Used MS Project for status reporting and project planning.
* Interacted with the QA developers on resolving the reported bugs.

Conducted Walkthroughs and User Acceptance Tests (UAT) and worked closely with the UAT personnel to both ensure that their needs are met.

**INDIABULLS SECURITIES. Ltd**

**Business Analyst**

**Delhi, India Jan 2008- Dec 2009**

**Responsibilities:**

* Assessing the stock market index, price fluctuations, exercise prices, processes and tool functionalities closely while working on data processing and recommending Process Enhancements.
* Maintaining and updating Price and Non-price database for Fixed Income Securities in particular with Bonds and Warrants.
* Performing extensive research on new stocks issued & new issues of fixed income securities, providing customized technology solutions and adding value to the customers' Capital and Derivative Investment decisions.
* Maintaining and providing Qualitative Data to our Customers - Quality at 100%.
* Performing timely Quality Audits on relevant products to discern content quality from a client perspective.
* Conducting quality checks on time series & static bond (warrant) data for the markets handled.
* Interfacing with the following on regular basis: • Suppliers and regular follow up with them to get the details consistently and identify alternate sources for data.
* Data Acquisition Team to explore the avenues.
* Counterparts through conference calls and business meetings related to fixed income markets, the major topics being major developments in the markets and knowledge sharing.
* Effectively managed various projects involving information gathering, testing on the product database, analyzing the information gathered and preparing documentation for the same.
* Effectively handled an assignment on analysis of client queries with the necessary findings for various European Markets.

**Pace Securities Ltd.**

**Business Analyst**

**Delhi, India Nov 2005 to Dec 2007**

**Responsibilities:**

* Conducted trade initiative on NSE Terminals: Neat Capital Market and F&O market.
* Conducted trade initiative on BSE Terminal and Currency Terminal.
* Assisted clients in making informed decisions.
* Reviewed accounts on a regular basis to ensure compliance with internal and external policies, guidelines, rules, and regulations.
* Created, implemented, and continually reviewed plans that include strategies designed to help clients to pursue their long-term investment goals
* Provided strategic quantitative models to high-net worth clients to reduce fees, beta and unsystematic risk while adding alpha.
* Formulated asset allocation strategies and developed proprietary investment models for client portfolios
* Maintained database of the financial documents, reports and quotations of every client in a prescribed format.
* Devised and executed business development strategies to attract and acquire new clients

**Education**

* MBA Finance - Tarleton State University, TEXAS A&M, TX - US
* Post Graduate Diploma in IT and Management – AIT , Gurgaon, Haryana - INDIA
* Diploma in Stock Market and Trading & Operations (DMST) – BLB Institute of Financial Market (BIFM), New Delhi - INDIA
* Bachelors in Journalism and Mass Communication (BJMC)

**Certificates**

* Certification in DERIVATIVES MARKET certified by the National Stock Exchange of India.
* Certification in CAPITAL MARKET certified by the National Stock Exchange of India