**Atharv Sharma**

**Business Analyst**

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# Summary

* Highly seasoned and reliable Professional with 8 years of experience and a brilliant customer satisfaction record in Finance, Banking, Accounting, Healthcare Domain along with the financial regulations.
* Adept at interdepartmental coordination to maximize business functionality and efficiency. Committed to ongoing professional development and innovation in management and problem-solving.
* Strong understanding of Capital Markets, , and Fixed Income products with respect to Brokerage Operations.
* Experienced in Financial Modeling, Financial Analysis Variance analysis, Trend analysis, Forecasting & Budgeting, loss reserve forecasting, FP&A, MS Excel Macros, VLOOKUPS, XLOOKUP, Pivot Tables, and US GAAP.
* Highly analytical, team-player, Excellent communication, interpersonal and problem-solving skills. Experienced in Business Development Process, System, Data analysis, and Creating Dashboards.
* Experienced in conventional Agile and Waterfall methodologies inclusive of Scrum and SAFe.
* Understanding of Asset management, Wealth Management, Forex, Hedge Funds, Investment Management.
* Steered elicitation sessions such as interviews, brainstorming, observations, requirement workshops, interface analysis, root cause analysis and JAD Sessions involving different stakeholders.
* Extensive experience in documentation of business requirements and system functional specifications, including Business requirement document, Functional requirement document, and System requirement document.
* Skilled in constructing Screen Mock-ups & Prototypes, UML diagrams such as Use Case, Collaboration Diagrams and Data Flow Diagrams as a business analysis methodology to define the Business Model in MS Visio and Lucid Charts.
* Worked with product owner in defining Definition of Done and Definition of Ready for product backlog items.
* Assist with the Agile story mapping following requirement elicitation and documentation (user stories).
* Knowledge of issue creation, system to approve changes, and evaluating advancement and completion using JIRA.
* Competent in supporting the Product owner to define Minimum Viable Product, Minimum Releasable Features.
* Used SQL to Create, Read, Update, and Delete operations and Python for portfolio analysis & performance.
* Experienced in documenting and mapping pricing processes for all rate plans and services. Also experienced in understanding existing legacy structures, systems and processes for pricing, design and help implement future solutions.
* Well Versed in tools like Microsoft Dynamics 365, Power BI and SSRS (SQL Server Reporting Services).
* Assisted in defining test cases, creating test scripts, analyzing bugs, interacting with QA / dev teams in fixing errors and Integration, System, and User Acceptance Testing (UAT) of system with knowledge on Software Testing Lifecycle.

# Domain Knowledge

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| Financial Instrument and Fields | Capital Markets, Financial Services, Asset Management, Wealth Management, Forecasting and Budgeting. | | |
| Compliance and Regulations | | CCAR, DFAST, SOX, Dodd-Frank Act, Volcker rule, Basel Accords |

# Skills

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| --- | --- |
| Project Management  Tools/Methodology | Unified Modelling Language (UML), MS-Project, MS Share Point, JIRA, and Agile-Scrum, Waterfall-Scrum, SAFe, Waterfall. |
| Modelling Tools | Power Designer, ER/Studio, Balsamiq, Lucid Chart |
| Requirement Management | MS Office, JIRA, Confluence, HP ALM, MS SharePoint, MS Excel |
| Reporting Tools | Tableau, MS office Suite, Power BI |
| Testing Tools | HP QC / HP ALM, SOAP UI, Postman |
| Data Warehousing | Data Modelling, OLAP, Data mapping, Data Analysis. |
| Finance tools | SAP, Oracle Hyperion, Workday Financials |

# Professional Experience

**Safelite Autoglass** Columbus, OH

### Business Analyst *Jan 22- Present*

Back Office Integration project, where we are integrating more than 60+ integrations. involve 3rd parties’ integrations, AP Invoices, and more. It is a middleware project, and my team is responsible for MuleSoft related work (Mule layer).

All integrations were based on MuleSoft, we used it to understand their integration needs, design and implement integration solutions, and manage and monitor integrations.

* Actively participate in planning and coordination of software releases to pre-production and production environments including the ETL process.
* Understand and adhere to established revision control standards and requirements tracking methods. Used SQL to understand the data and related policies.
* Managed monthly budget, revenue/expense, forecasting, and reviewed expense accounts.
* Convey high level knowledge of and adhere to Safelite’s Software Development Lifecycle process. Conducted loss reserve forecasting along with financial analysis.
* Protect Safelite’s technical brand by securing information, practicing need-to-know, maintaining company privacy, and adhering to best practices.
* Recognize and provide timely feedback to management, project managers, and lead business analysts regarding project roadblocks as needed.
* Able to communicate in an effective manner that promotes healthy relationships with both internal and external team members.
* Actively participate in the Software Quality testing cycle by being a liaison between IT and business partners.

ENVIRONMENT: Scrum Hybrid, MS Office Suite, MS SharePoint, MS Visio, Lucid Charts, JIRA.

**US Bank** Meridien, MN

### Business Analyst *June 21- Jan 22*

Data Integration and API Migration Project

The Project is to Integrate nCino (Integrated in Salesforce) with existing US Bank systems and applications. Migration project is OSB to Apigee where all the existing OSB APIs are Planned to move to Apigee proxies.

Roles and Responsibilities:

* Lead business requirement discussions and create the business & functional requirements document in partnership with other team members.
* Supporting the marketing quarterly functional forecasting and annual budgeting processes
* Review current business processes and develop future state business process flows & operating models.
* Designing reporting and data mapping documents connecting source data to the target data with business transformation logic. Assisted the finance team in conducting loss reserve forecasting.
* Work with the team using project management tools like JIRA; collaboration tools like SharePoint, and MS teams for daily meetings and project updates.
* Facilitate requirements gathering and communication between functional/SMEs and technical contacts.
* Drive technical designs for all R1 integrations, ETL, Own related data mappings and sequence diagrams.
* Create, groom, and track integration user’s stories, action items, defects, etc.
* Understand that Salesforce and Middleware need to implement the integrations. ∙ Work with the team in creating low fidelity and high-fidelity wireframes and mock-ups, research technical solutions to challenges faced by the system.
* Conduct stakeholder interviews & Conduct workshops to gather functional inputs on engagements.

ENVIRONMENT: Scrum, MS Office Suite, MS SharePoint, MS Visio, Lucid Charts, MS Teams, SQL, nCino

**Labcorp** Burliington,NC

### Business Analyst *Jan 20’- May 21’*

Roles and Responsibilities:

* Developed good understanding of how Automated Investment Advisor works and business model adopted by the firm.
* Performed GAP Analysis and worked closely with the product owner and other stakeholders to develop a detailed understanding of the new requirements and features.
* Organized JAD sessions, Document analysis, and Interviews with various projects stakeholders involving Financial Advisors, Portfolio Managers, Quant team, and legal teams to elicit requirements, identify and resolve open issues.
* Worked alongside with Product Owner and cross functional teams to establish comprehensive business and functional requirements and then translating those requirements into software design specifications using various notations of UML for designing and documenting the detailed business and functional requirements in form of a High-Level Document.
* Attended stakeholders’ meetings to document changes and implemented procedures to test changes, Identified Use Cases from the requirements and created Use Case Diagrams, Activity Diagrams and Sequence Diagrams using MS Visio.
* Utilized JIRA and Confluence to track project progress and team collaboration to complete the project successfully and prioritized and tracked user requirements to maintain Product Backlog Items (PBIs) and defects.
* Carried out User Acceptance Testing (UAT) for reviewing the performance of the system, created a dummy account to check that all functionalities are working as the requirements and a customized portfolio is working.

ENVIRONMENT: Agile-Scrum, SQL, MS Visio, MS Office (MS Word, Excel, PowerPoint), JIRA (8.4.2), Confluence (7.0),

**Charles Schwab** Phoenix, AZ

### Business Analyst *Nov 18- Dec 19*

The project's goal was to improve the dealing desk so that it could help hedge funds and portfolio managers/traders with their trading strategies for capital markets by adding features like real-time insights and visual snapshots of their positions from data sources like S&P Global, Moody’s Analytics, and Dow Jones.

Roles and Responsibilities:

* Developed good understanding of Dealing Desks functioning, understanding the Trade cycle, and gathered knowledge of various financial instruments like commodities, fixed income, forex, bonds, covering capital markets.
* Developed high and low fidelity wireframes and mockups using Lucid Charts.
* Steered the Planning Poker to estimate well sliced user stories in Sprint Planning and Backlog Grooming meetings. Helped Product Owner in prioritizing the same based on MoSCoW, and Business value based.
* Worked with the ETL developers to map data from sources like Dow Jones, S&P Global and perform transformations of financial instruments to the trader’s system using data mapping documents.
* Assisted Portfolio Managers and Traders to create detailed reports like Portfolio Performance and daily trading report.

ENVIRONMENT: Essential SAFe, MS Office Suite, MS SharePoint, MS Visio, Lucid Charts, JIRA, Cognos TM1 S&P Global, Dow Jones.

**J.P. Morgan Chase** (Off-shore Project) Wilmington, DE

### Financial Business Analyst *May17- July18*

The project entailed developing end-to-end solutions with all functionalities enhanced as per customer specifications. The solution enabled the client to track and brand the customers to deliver superior personalized service and stay ahead of competition. The result was a completely prioritized, and user-friendly, real-time listing of mutual funds, equities, fixed income, portfolios, options, annuities, IPOs, and other asset classes to be broadcast over the web and Bloomberg terminals.

Roles and Responsibilities:

* Experience from Front to back office, financial services, worked with fund managers, financial advisors.
* Designed asset management portfolio for its customers as per business requirements.
* Created a High-Level Requirement Document including functional, non-functional, and data requirements which would, thus, fill in as the highlight of the project.
* Completed the project successfully by using JIRA and Confluence to track project progress and team collaboration and tracked user requirements to maintain Product Backlog Items and defects.

ENVIRONMENT: Agile-Scrum, SQL, MS Visio, MS Access, MS Word, Excel, PowerPoint, JIRA, Confluence, Postman.

**Edelweiss** Mumbai, India

### Financial Business Analyst *Feb16 -Mar17*

Roles and Responsibilities:

* Worked in Waterfall-Scrum hybrid environment on documentation of requirements as well as assisting the Product Owner in research and the team in iterative releases.
* Collaborated with project managers to develop detailed project information for their task assignments.
* Analysed and gathered requirements for preparation of artifacts including BRD and FRD.
* Identified and documented Business Process Workflows using UML Diagrams (Use Case, Activity and Sequence).
* Used JIRA to generate and maintain the artifacts such as Product backlogs, Sprint backlogs, User stories and defects.

ENVIRONMENT: Waterfall-Scrum, MS Office 2013, MS Visio, Tableau, Lucid Chart, JIRA, Confluence.

**ICICI Securities** Pune, India

### Business Analyst *Dec14 - Jan16*

Roles and Responsibilities:

* Using Structured Questionnaire, brainstorming, and document analysis, we elicited the project's business requirements.
* Analysed any risks that may impact the requirements on a project.
* I took part in Sprint Retrospective meetings, Release Planning, Backlog refinement, and Product demos.

ENVIRONMENT: Agile-Scrum, MS Visio, MS SQL Server, SharePoint, MS Office (Excel, Word, PowerPoint), Power BI.

**IDBI Bank** Pune, India

### Quality Assurance Analyst *June 13- Nov 14*

Roles and Responsibilities:

* Identified and tracked issues, risks, and action items.
* Reviewed and understood the Test Teamwork plan.
* Researched problems before approaching the Team Lead or Test Team Lead for assistance.
* Assisted Application Teams to plan and execute component and assembly tests.

ENVIRONMENT: Waterfall, MS Word, Excel & Share point, MS Visio, Mock-ups, Jira.

# Education

MS in Finance- University of Bridgeport

Bachelors in business administration- Devi Ahilya Vishwavidyalaya.

# Certification

Financial Modelling and Valuation Analyst- Corporate Finance Institute.

Bloomberg Market Concepts- Bloomberg.

Scrum Master Accredited Certification- International Scrum Institute