

# FM HASSAN

Salesforce Consultant | Business System Analyst | Project Manager

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## PROFESSIONAL SUMMARY

- Seasoned Lead Salesforce Business Analyst with over 15 years of comprehensive IT experience spanning business analysis, Salesforce consulting, and system integration across diverse industries.
- Well-versed in catering to the unique needs and requirements of various industries, including Telecom, Higher Education, Healthcare, Hospitality, and Non-Profit sectors, with a diverse portfolio of successful Salesforce implementations tailored to specific industry standards and regulations.
- Proficient in orchestrating end-to-end Salesforce implementations, leveraging extensive expertise in business analysis to translate complex business requirements into scalable and innovative Salesforce solutions.
- Skilled in leading cross-functional teams and collaborating closely with stakeholders to define project scope, objectives, and success criteria, ensuring alignment with business goals, and delivering maximum value.

- Adept at configuring and customizing Salesforce Sales Cloud, Service Cloud, and Experience Cloud to meet unique business needs, including advanced features such as case management, CTI integration, and entitlements.
- Collaborate with stakeholders to gather and analyze requirements, ensuring alignment with business objectives and user needs for Salesforce OmniStudio. Configure and customize Salesforce OmniStudio components (Journey Builder, Interaction Studio, Audience Studio) to meet specific business processes and requirements.
- Experienced in utilizing MuleSoft to integrate Salesforce with a variety of systems and platforms, facilitating seamless data exchange and interoperability across the organization.
- Proficient in Agile methodologies, overseeing sprint planning, backlog grooming, and sprint reviews using tools like JIRA and Azure DevOps to drive iterative development and rapid delivery of features.
- Demonstrated expertise in optimizing Salesforce workflows and automations to streamline business processes, improve efficiency, and enhance user productivity, driving tangible business results.
- Strong analytical skills, with a proven ability to conduct in-depth system analysis and performance tuning to identify opportunities for optimization and ensure scalability and reliability of Salesforce solutions.
- Excellent communication and collaboration skills, with a track record of effectively liaising between business stakeholders, IT teams, and third-party vendors to ensure successful project outcomes.
- Committed to continuous learning and professional development, staying abreast of emerging Salesforce technologies and best practices to drive innovation and deliver cutting-edge solutions to clients.

## TECHNICAL EXPERIENCE:

Methodologies	RUP, Agile, Waterfall, Kanban
Office Tools	MS Project, MS Word, MS Excel, MS PowerPoint, MS Outlook
Business Modeling Tools	Microsoft Visio, Lucid Charts, Draw IO

Project Management Tools	JIRA, Azure DevOps, Confluence
Version Control Systems	MS SharePoint
Database	MS SQL Server, MS Access, and Oracle
Certifications	Salesforce OmniStudio Consultant, Salesforce Community Cloud, Salesforce Service Cloud, Salesforce Platform App Builder, Salesforce Administrator

## PROFESSIONAL EXPERIENCE:

*Employer: Metasoft Solutions / June 2013 – Present*

*Role: Salesforce Consultant*

*Responsibilities:*

### **May 2023 – Present: University of Maryland Global Campus**

- Conducted university wide detailed discovery across student and staff lifecycle in Stateside, Stateside Military, Asia and Europe to improve the experience and achieve day-to-day operational efficiencies.
- Lead in-depth discovery sessions with staff for various department (marketing, advising, academics, student support, student account, financial aid, graduate & alumni) to understand their unique business processes and challenges within the Salesforce ecosystem.
- Facilitate workshops and interviews to gather comprehensive business requirements across various departments, including admissions, student services, fundraising, and alumni relations.
- Analyze existing Salesforce implementation to identify areas for improvement and optimization, providing recommendations for streamlining processes and enhancing user experience.
- Collaborate closely with stakeholders to prioritize requirements and define project scope, ensuring alignment with institutional objectives and constraints.

- Develop detailed documentation of business processes, data models, and system integrations, providing clarity and transparency throughout the discovery phase.
- Conduct thorough assessments of data quality and integrity within the Salesforce environment, identifying opportunities for data cleansing and migration as needed.
- Evaluate potential third-party solutions and app exchange products to address specific functional requirements or gaps in Salesforce capabilities, presenting findings and recommendations to the client.
- Prepare comprehensive discovery reports and presentations to communicate findings, insights, and proposed solutions to higher education stakeholders and executive leadership.

#### **Feb 2021 – May 2023: National University,**

- Led the integration efforts for the merger of National University (NU) and Northcentral University (NCU), overseeing the alignment of enrollment processes for both institutions within the Salesforce platform.
- Evaluated and analyzed existing processes within NCU's Salesforce instance to identify areas impacted by the merger and ensured seamless transition for the NU Enrollment team.
- Designed and implemented end-to-end processes for lead management, applicant intake, opportunity management for applicant qualification, and case management for student support, ensuring alignment with merged organizational objectives.
- Collaborated closely with cross-functional teams to gather requirements, define project scope, and prioritize initiatives to support the integration of enrollment teams and processes.
- Conducted comprehensive assessments of data migration requirements and data mapping between NU and NCU systems, ensuring data integrity and continuity throughout the merger process.
- Provided expert guidance and support to stakeholders throughout the merger process, including training sessions, documentation, and ongoing support for Salesforce system usage and best practices.
- Facilitated communication and collaboration between NU and NCU enrollment teams, fostering a cohesive environment and ensuring alignment of processes and goals within the Salesforce platform.

- Design and document end-to-end customer journeys and experiences, leveraging Salesforce OmniStudio capabilities for personalized interactions across multiple channels.
- Continuously monitored and evaluated the effectiveness of implemented processes and systems post-merger, identifying areas for optimization and improvement to enhance overall operational efficiency and student experience.

#### **May 2020 - Feb 2021: Cal-Access Replacement Systems (CARS), California**

- Spearheaded the implementation of the California Automated Lobbyist and Campaign Contribution and Expenditure Search System (CAL-ACCESS) for the California Secretary of State (SOS), overseeing a multi-million-dollar project spanning three phases.
- Managed the project budget exceeding \$10 million, ensuring efficient allocation of resources and adherence to financial constraints throughout all phases of implementation.
- Orchestrated the phased rollout of CAL-ACCESS, with the beta version of phase 1 successfully going live in February 2021, meeting critical milestones and deadlines.
- Coordinated the simultaneous operation of the legacy system alongside the development and deployment of CAL-ACCESS, ensuring continuity of service and data integrity throughout the transition period.
- Led and managed two cross-functional scrum teams comprising Salesforce and MuleSoft development experts, fostering collaboration and synergy to achieve project objectives efficiently.
- Collaborated closely with stakeholders and subject matter experts to gather requirements, define project scope, and prioritize features and functionalities for each phase of CAL-ACCESS implementation.
- Provided strategic guidance and technical expertise to the development teams, ensuring alignment with industry best practices, security standards, and scalability requirements.
- Conducted regular risk assessments and mitigation strategies to address potential challenges and ensure the successful delivery of CAL-ACCESS within scope, budget, and timeline constraints.

#### **June 2019 - May 2020: ASLD Salesforce Implementation**

- Oversaw a strategic project with the Arizona State Land Department to completely revamp the Arizona State Land Department's Experience Cloud portal, enhancing the citizen experience through intuitive design and streamlined processes.

- Conducted user research and gathered feedback to understand citizen pain points and preferences, informing the redesign process and ensuring alignment with user needs.
- Collaborated with UX/UI designers to create a visually appealing and user-friendly interface, incorporating modern design principles and accessibility standards.
- Implemented new features and functionality within the Experience Cloud portal to improve citizen engagement, such as interactive maps, self-service tools, and personalized content.
- Worked closely with developers to customize and configure the Experience Cloud platform, leveraging its capabilities to
- Led the integration efforts between Salesforce and legacy systems, as well as third-party platforms such as ESRI and Form Assembly, ensuring seamless data flow and interoperability.
- Collaborated closely with stakeholders to gather requirements, define project scope, and prioritize enhancements based on business needs and strategic goals.
- Provided expert guidance on Salesforce best practices, solution architecture, and system design to ensure optimal performance, scalability, and maintainability.

#### **Jan 2018 - June 2019: Make-a-Wish America Service Cloud Implementation**

- Led the end-to-end implementation of the "Wish and volunteer center" for Make a Wish America, utilizing Salesforce Service Cloud and Salesforce Experience Cloud to cater to the needs of multiple departments and stakeholders.
- Managed a diverse user base of over 100 internal users and facilitated engagement with 500+ active volunteers, ensuring seamless collaboration and efficient workflow management.
- Orchestrated the integration of various applications and technologies, including a document management solution hosted on AWS and a MuleSoft integration solution, to enhance the functionality and connectivity of the Salesforce ecosystem.
- Oversaw the successful migration of 70+GB of records from Blackbaud to Salesforce, ensuring data integrity and continuity of operations during the transition.
- Effectively managed project budget totaling approximately \$2 million, inclusive of post go-live support and enhancements, while delivering high-quality solutions within scope and on schedule.

- Collaborated closely with stakeholders to gather requirements, define project objectives, and prioritize features and functionalities to meet the organization's needs and strategic goals.
- Provided strategic guidance and technical expertise on Salesforce best practices, solution architecture, and integration patterns, ensuring scalability, security, and maintainability of the implemented solutions.
- Continued to provide post-go-live support and enhancements, working closely with Make a Wish America's team to address user feedback, optimize system performance, and drive continuous improvement in line with evolving business requirements.

### **Feb 2017 - Dec 2017: NuHomes Salesforce Implementation**

- Participated the implementation of a call center solution for NuHomes, leveraging Salesforce Service Cloud as the central platform to manage customer interactions and contractor connections.
- Integrated Five9 CTI (Computer Telephony Integration) with Salesforce Service Cloud to enable seamless inbound and outbound call management, improving agent productivity and customer service efficiency.
- Orchestrated the integration of MuleSoft to facilitate data exchange between Salesforce Service Cloud and external systems, ensuring real-time access to contractor information and project details for call center agents.
- Collaborated with stakeholders to define requirements and customize Salesforce Service Cloud to support NuHomes' unique business processes, including call routing, case management, and contractor assignment workflows.

### **Feb 2016 - Feb 2017: Apollo Global Salesforce Implementation**

- Led the implementation of a comprehensive call center solution for the enrollment process across multiple schools under Apollo Global, utilizing Salesforce Service Cloud as the primary platform for student interaction management.
- Integrated Genesys CTI seamlessly with Salesforce Service Cloud to empower enrollment advisors with efficient inbound and outbound call capabilities, facilitating personalized assistance to students in selecting courses and completing applications.
- Orchestrated MuleSoft integration to enable smooth data flow between Salesforce Service Cloud and internal systems, ensuring enrollment advisors have real-time access to student information and application status for effective assistance.
- Collaborated closely with stakeholders to design and configure Salesforce Service Cloud to support streamlined enrollment processes, including case management, application tracking, and internal workflows for application processing.

### **Feb 2014 - Feb 2016: Western International University Salesforce Case Management Application**

- Participated the implementation of enhancements within Salesforce Service Cloud to streamline operations and enhance student support services at Western International University.
- Collaborated with stakeholders to gather requirements and design solutions that integrate Salesforce Service Cloud with the university's student information system (SIS), ensuring seamless data exchange and unified student records.
- Configured Salesforce Service Cloud to support various operational processes, including student inquiries, admissions, enrollment, academic advising, and student services, tailored to the specific needs of Western International University.
- Provided guidance and training to university staff on utilizing Salesforce Service Cloud effectively for managing student interactions, tracking student progress, and delivering personalized support services.
- Conducted regular assessments and optimizations of the Salesforce Service Cloud implementation to ensure alignment with evolving business requirements and industry best practices, driving continuous improvement in operational efficiency and student satisfaction.

### **May 2013 - Feb 2014: CEA Study Abroad Salesforce and MuleSoft Implementation**

- Collaborate with university stakeholders to understand and document business requirements for the Salesforce implementation, encompassing admissions, student services, fundraising, alumni relations, and academic programs.
- Lead requirement gathering workshops and interviews to elicit comprehensive business needs and objectives, ensuring alignment with institutional goals and industry best practices.
- Analyze existing business processes and workflows within the university, identifying areas for improvement and optimization through Salesforce solutions.
- Design and configure Salesforce to support end-to-end processes, including lead management, applicant tracking, student enrollment, academic advising, and alumni engagement.
- Collaborate with Salesforce developers and administrators to customize the platform, leveraging declarative tools, Apex code, and Lightning components as needed.
- Manage data migration activities to ensure seamless transition of student and institutional data from legacy systems to Salesforce, maintaining data integrity and accuracy.



- Facilitate user acceptance testing (UAT) and provide training and support to university staff to ensure successful adoption and utilization of Salesforce across departments.
- Continuously evaluate and enhance the Salesforce implementation based on user feedback, evolving business needs, and advancements in Salesforce technology and best practices.

*Employer: Avventis / Feb 2013 – June 2013*

*Client: Mediacom, Middletown, NY*

*Role: Business System Analyst (Salesforce)*

*Responsibilities:*

- Interacted with various business user groups for gathering the requirements for Salesforce implementation and documented the Business and Software Requirements.
- Designed Custom Objects, Entity-Relationship data model, validation rules on the objects and tabs. Defined lookup and master-detail relationships on the objects and created junction objects to establish connectivity among objects.
- Worked on Validation Rules, Workflows and Approval Processes. Created templates, approval processes, approval page layouts and defined approval actions on them to automate the processes.
- Developed and configured various Reports and Report Folders based on the need in the organization. Created the Dashboards for the senior level management.
- Provided daily user support in managing users, creating and maintaining custom objects and fields, handling bulk data migration, maintenance of page layouts, and installation and support of AppExchange applications.
- Used the sandbox for testing before the application is migrated to production.
- Involved in querying Salesforce tables using SOQL queries using Force.com Explorer.
- Created various profiles and configured the permissions based on the organizational hierarchy requirements.
- Responsible for all the activities related to configuring Data Loader, uploading data in CSV files into Salesforce.com, checking for the correctness of the data.

- Interacted with various business team members (JAD Sessions) to gather the requirements and documented the requirements.
- Conducting Weekly Trainings for the Account Reps to use Salesforce & creating training manual for their ease.
- Giving live support to 240 account executives, sales supervisor, support coordinators & higher management.
- Developed, maintained and executed Salesforce test cases (functional) as per the test plan.
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- Attend and collaborate in all stand ups, planning and design sessions.
- Understand the functionality of Scrum team specific test cases and End to End test cases.
- Work with upstream and downstream application teams to execute E2E test cases.

*Employer: Genesis Technology Solutions / June 2012 - Jan 2013*

*Client: Mediacom, Middletown, NY*

*Role: Business System Analyst (Salesforce)*

*Responsibilities:*

- Interacted with various business user groups for gathering the requirements for Salesforce implementation and documented the Business and Software Requirements.
- Created the Configuration Workbook incorporating the Standard & Custom Objects for the As-Is model.
- Created the detailed project plan to include every task for the key focus areas in Microsoft Project.
- Created the Data Model for the Standard & Custom Object in Excel for the To-Be model.
- Created the Process models separately for different interactions in Microsoft Visio.
- Created Analytic Snapshot for the capturing the historical data based on the different fields of the Lead object.
- Proficiently documented Use Cases, Activity Diagrams and Data Flow Diagrams for projects like configuring new departments, integrating systems, and developing authenticated websites.
- Independently perform development, testing and implementation of the business process
- Documenting and updating relates of Salesforce.com software and system administration focusing on Service cloud.

- Creating approval matrix and defining workflow process depending on the requirements
- Assisting development team in creating inbound and outbound change sets to move them to respective environments.
- Created page layouts and field security depending on the user profile.
- Customized dashboards and reports depending on the user requirements.
- Maintain multiple user roles, security, profiles, workflow rules, etc.
- Support, train new end users, and create User manual on the Salesforce.com application.
- Maintaining customer portal users to access the integrated application, developed on a flash builder.
- Used Data Loader to update, insert records for products, accounts and other custom objects.
- Extensively used JIRA for tracking issues, change requests & new requirements.
- Performed the roles of Salesforce.com Business Analyst Lead in the organization.

*Employer: New Jersey Institute of Technology, Newark, NJ | Oct 2011 – May 2012*

*Role: Software Test Consultant*

*Responsibilities:*

- Prepared numerous Use Case Diagrams, Activity Diagrams in MS Visio in compliance with various business scenarios.
- Worked extensively with Google Docs, MS Excel, MS Visio and MS PowerPoint for preparing presentation documents.
- Conducted User Training sessions and prepared the User Training Materials.
- Extensively used Shared point to upload and maintain various versions of Functional Documents, User Training Manuals and all Project related documents.
- Following SCRUM methodologies during the project.
- Played a vital role in teamwork.
- Developed the Manual Test plan for Academics Computing Services (ACS) for the migration from Exchange (w/ Outlook client) to Gmail (w/ Outlook client).
- Executing the test cases & escalating the issues to the development team.

- Conducting testing on various mobile platforms viz. Windows, Android, iOS & Blackberry.
- Conducted testing on iPad, Motorola Xoom, Lenovo Ideapad.
- Creation of the Manual test cases.
- Creation, Maintenance & Testing of IST webpage.
- Conducted Agile testing for the upcoming releases.
- Maintenance of Computer in the labs.
- Installing, updating the software's in the computer labs.

*Employer: Accenture / Mar 2010 – Aug 2011*

*Client: British Telecom*

*Role: Salesforce Business Analyst*

### *Responsibilities*

- Worked as Manual & Automation Web Application Tester
- Creation & Execution of test cases in Quality Centre (QC)
- Conducting Internal Audits for process improvement
- Execution of smoke, regression, test cases, Ad hoc testing for each build.
- Automating the smoke & regression test cases.
- Analysis Creation, Execution of scenarios based on the trackers.
- Knowledge transition to the new team members.
- Understanding requirements and test scenario identification.
- Publishing weekly reports regarding the health of the project – Application Operation & Quality Centre Review Score Card (which was sent to the higher management)
- Created the Business Glossary that defined the term used during the modeling.
- Designed business models that served to identify requirements and communicate information between teams.

- Mentored and Knowledge transfer on how to create and implement test assets in RQM – Test Plan, Test Case, Test Scripts, Test Execution Records, Test suites, how to execute test and report on the test result using RQM Reports.
- Used use case diagram during analysis to capture requirements.
- Conducted acceptance tests to verify that the validation effort was complete.

*Employer: iGATE / Aug 2007 – Feb 2010*

*Client: Thomson Reuters, Pune India*

*Role: Quality Analyst*

*Responsibilities:*

- Daily Interacting with the Client regarding the daily task and queries regarding the task.
- Team Track Verification
- Execution of smoke, regression, test cases, Ad hoc testing for each build.
- Analysis Creation, Execution of scenarios based on the trackers.
- Defect Logging and Tracking in tool called PVCS-Tracker & follow-up till resolution.
- Knowledge transition to the new team members.
- Actively involved in SDLC, Test Plan, Test Life cycle, Test Methodologies, Test strategies.
- Updating Test Plans, Test strategies, Test results as per the change requests.
- Implement proven risk mitigation efforts and make recommendations to improve product reliability and performance.
- Executing the test cases and analyzing the test results.
- Involved in Defect status reporting.
- Prepare bug summary reports and release notes.

- Performed Agile Testing where new functionalities were added for every Release.
- Performed both positive and Negative testing to validate the Test Data.
- Automating the smoke & regression test cases.