

## Salesforce Architect/Delivery Lead

### Professional Summary

An experienced leader in managing Salesforce CRM systems, processes, and delivery across multiple verticals and business units - Sales, Marketing, Finance, Public Sector, and Non-Profit. Certified Salesforce professional with solid experience helping organizations with Business Process Improvement utilizing the Salesforce platform and delivering quality designs, applications, and processes. Comprehensive experience includes playing the Architect role while managing the project delivery and client, parallelly supervising schedules for administrators, developers, and testers, effectively using, and enhancing personnel's skills, meeting budget and time constraints, and fully satisfying the customer's needs. Responsive to customers, and able to draw out critical requirements and collaborate across diverse functional areas. Proficient in various CRM tools, Data Analytics, Tableau, Flow, Lightning, Apex, SFDX CLI, Mulesoft, and Omni Studio.

### Areas of Expertise

Sales, Service, Marketing, GovCloud, Experience Cloud  
Public Sector Solutions  
Salesforce security and configuration  
Low Code/No Code Deployments  
Reporting and Data Analytics  
Data Architecture  
FedRAMP, ATO (Authority to Operate)  
Active directory PIV Integration

Gap Analysis/ Impact Analysis  
OmniStudio and Flows  
Scrum/Agile Methodology  
Data Analysis and Migration  
CPQ, CLM, and Revenue Lifecycle  
System Integration and APIs  
System Development and Design  
Single Sign On implementation

### Work Experience

#### **Incapsulate, Washington DC**

**March 2022 – April 2024**

As a cloud delivery leader and an Architect, I contributed my expertise in various subject areas, including process improvement, change management, strategy, Cloud architecture, and Cloud expertise, in a senior capacity to client projects. My role supported the company's objectives of increasing revenue, enhancing client satisfaction, and ensuring the quality of project delivery. I managed the on-shore and off-shore teams for effective technical delivery, prioritized the requirements and enhancements; and served as leader and mentor for team members requiring assistance or clarification.

#### **Salesforce Architect, Chicago Police, Fire, and Paramedics**

**October 2023 – April 2024**

Lead Architect to design the Recruitment Application for the Chicago Police, Fire, and Paramedic recruitment system in the City of Chicago Public Safety Administration (PSA) on Salesforce Public Sector Solutions (PSS)

- Led the client Discovery sessions and technical development for Chicago city Recruitment Application
- Drove the delivery of the project by overseeing the Backlog and Client management.
- Guided the technical team with the system and solution design for Application and Case management.
- Led the product development team of developers and Quality Assurance engineers.
- Mentored and managed the Business Analysts for effective delivery and helped them prioritize the features and enhancements.
- Designed the Recruitment Application System in Salesforce for Chicago HR, other business units, and a Portal for Applicants and Application process vendors.
- Defined the Data and Security model for the application's Internal and External users.
- Delivered the System Design Document (SDD), Architectural diagrams, and Solution landscapes.

#### **Technical Architect, PAN Foundation**

**October 2022 – September 2023**

Technical Architect/Lead for implementation of Grant Management System built on Public Sector Solutions (PSS) for application, verification, and approval of Grants submitted by patients, caregivers, Pharmacy, and Hospital staff.

- Spearheaded the project requirements sessions to understand the client's needs and provided a viable solution to their business problems.
- Translated the business requirements into technical requirements, produced system design & architecture documents for Grants management, related Contacts, and Case Management for internal and external users.
- Led the technical and functional teams to design, build, test, and implement salesforce applications.

- Delivered a specification to a team of Salesforce administrators and developers to deliver the solution.
- Developed strategies to solve complex technical challenges.
- Implemented solutions that support business requirements and drive key decisions that improve processes and productivity.
- Led the technical delivery of Salesforce implementations, custom solutions, and integration development.
- Oversaw a team of Business Analysts (BAs) and provided coaching to ensure effective delivery of requirements.
- Managed on-shore and off-shore developers, and oversaw the entire development effort.
- Provided technical guidance to developers and Administrators on best practices and solutions.
- Actively participated in Project management, Resource Planning, and Velocity tracking activities with the Project Management team
- Played an advisory role for the Data migration team on best practices to migrate data in Salesforce.
- Managed the DevOps in Azure and led the Deployments and Go Live strategy activities.

**Salesforce Architect, Financial Services (Principal, Vero, Amtrust)**

**March 2022 – October 2022**

Lead Architect to establish a viable system design for Insurance and Policies, and Case management on the Financial Cloud.

- Engaged with clients to understand their Business Processes to suggest a viable solution.
- Directed technical solutions per the business roadmap, ensuring alignment with business objectives.
- Developed a scalable, secure, stable, and low-maintenance system.
- Led integration and design discussions with other application groups.
- Provided leadership and guidance to the technical team which complies with technical best practices and enterprise architecture.
- Provided coaching and mentorship to the team on Salesforce design and implementation methodologies and strategies.
- Worked with Client Product Managers and Business owners to curate the Product roadmap.
- Spearheaded the data migration from the legacy system to the salesforce application.

**Agility Technologies, Reston, VA**

**March 2020 - July 2022**

As a Solutions Architect, responsible for recommending and presenting designs and solutions to clients, collaborating closely with project team members. My role supported Business Analysis, System Design, Data Model, Development, and overseeing the project delivery along with being a Security Engineer responsible for the client's ATU and ATO. I managed complex projects, from requirements gathering through go-live and post-deployment client support.

**Solutions Architect, Drug Enforcement Administration (DEA-DoJ)**

**Feb 2021 – July 2022**

Architect for DEA Disciplinary Management System (DMS) built on FedRAMP Service Cloud to manage cases based on allegations submitted by DEA employees via the portal.

- Participated in Discovery sessions with Business to identify the business process.
- Designed the Security model for DMS and recommended the best possible solution for the business problem.
- Developed and provided a demo on POC based on requirements and got the business sign-off on the design.
- Mentored data analysts and administrators on best practices and implementation.
- Developed complex queries to retrieve data for migration from the SQL server.
- Led the data migration from the Legacy system to Salesforce with a team of Data Analysts.
- Implemented Salesforce Shield for encrypting PII data and optimizing the release management process.
- Curated ATO documents and got approval from CISO.
- Implemented Single Sign On (PIV integration) with Active Directory as the identity provider.
- Developed Dashboards in CRM Analytics Studio (Tableau).
- Trained the trainers on the salesforce application (Service and Experience Cloud).
- Identified enhancements and new developments to resolve the agency's business problem, which led to the company's revenue growth.
- Built a lasting trust and relationship with the Agency's prime stakeholders for continuous growth and partnership.

**Security Engineer, Department of State (DoS)**

**September 2020-March 2021**

- Collaborated with the Government teams to understand Cyber Security requirements for the DoS framework for the ATO process
- Supported and built all security-related documents and artifacts supporting DoS and ATO
- Integrated new architectural features into existing infrastructures, designed cyber security architectural artifacts, provided architectural analysis and related existing systems for future needs and trends, provided engineering recommendations, and resolved integration/testing issues.
- Conducted risk assessment and provided recommendations for application design.
- Used encryption technology, penetration and vulnerability analysis of various security technologies, and information technology security research.

**Solutions Architect, Office of Personnel Management (OPM)**

**June 2020-June 2021**

Architect and Tech lead for the OPM's Document Approval Management System (DASH) built on FedRAMP Gov Cloud which drives multiple approvals of a policy across different OPM business units

- Delivered the DASH system design by driving the Object and security model and setting the business logic.
- Managed the backlog and client relationship by participating in the discovery sessions.
- Delivered demos and presentations to help the client understand the development progress of each Sprint.
- Curated ATO to manage risk in their networks by evaluating the security controls for new and existing systems and getting them approved by Internal and External CISO teams.
- Implemented Single Sign On (PIV integration) with Active Directory as the identity provider.
- Trained the trainers on the salesforce implementation
- Delivered Solution Design Document, ERD, and architecture diagram

**Solutions Architect, Small Business Administration (SBA)**

**April 2020-October 2020**

Architect for the design and migration of the existing Disaster Loan Assistance Portal (DLAP) to Salesforce Gov Cloud

- Led the Discovery sessions with the Business to identify the SBA Loan process
- Created AS-IS, TO-BE Loan process, and epics for user stories
- Delivered object Model diagram and architectural diagram for proposed Community Loan processing system
- Managed developers and Testers to get the development and testing done.
- Ensured the functionality has been developed based on requirements.
- Developed Solution Design Document for the Salesforce Community based Loan processing system
- Created a training document for the new system (Service and Community Cloud)
- Developed flows, approvals, validation rules, and other configurations.

**WealthEngine, Bethesda, MD**

**September 2018 – March 2020**

**CRM Manager**

Managed Sales, Service, and Marketing CRM systems and processes. Liaison with cross-functional team to hash out the requirements for Sales, Marketing, Service, and client services team, and propose a feasible design for process improvement.

- Managed the implementation of **CPQ** to configure the WealthEngine-offered Products and Bundles
- Managed Lead-to-Cash Business Process, configured price quotes with customized product and pricing
- Identified gaps in business processes and provided recommendations for process improvement
- Led **CPQ**, Marketing Automation, Data Quality Management, Pricebook and Product Management, Lightning migration, development (Visualforce, Apex)
- Spearheaded Lead Cycle and Sales cycle process improvement initiatives
- Led Salesforce integrations (Marketo, Hubspot, SaaSOptics, RingLead, ZoomInfo, Salesloft, FullCircle, Conga, Adobe - EchoSign) and other AppExchange apps.
- Conducted training/brown bag sessions on new processes for Sales
- Mentored analysts, admins, and team members on best practices

- Supported Sales and Marketing Operations (internal users) and provided SF support on client calls
- Implemented and improved DevOps CI/CD practices.
- Developed Process flow diagrams in Lucidchart for current and proposed process flow.
- Created Process Builder, flows, and Workflows, maintain security and validation rules for data integrity.
- Led salesforce migration to the Lightning system

**Acumen Solutions, McLean, VA**

**January 2018 – August 2018**

**Technical Lead, OPIC**

Technical Architect and Lead to manage the overall technical delivery of the client.

- Guided the team of developers, administrators, and QA regarding technical design.
- Primary liaison with clients regarding requirements, technical issues, or questions.
- Owned the overall solution architecture and design to meet functional requirements and user stories.
- Strategized solutions based on project scope; and the ability to support long-term objectives.
- Ensured technical components fulfill the user stories, ERD, and object modeling.
- Oversaw the entire deployment process and provided recommendations as needed.
- Communicated to the client on deployment plans and upcoming releases.
- Owned the delivery of the overall technical solution, collaborating with the technical team as needed.
- Led the daily SCRUM calls and led the Sprint Planning and Grooming sessions
- Led client executive weekly status meetings to provide Tickets and Sprint status

**The Carlyle Group, Washington DC**

**August 2017 – October 2017**

**Salesforce Systems Analyst**

- Supported salesforce team as SME for Data Management and Service Cloud Implementation.
- Developed RACI model for Data Management project implementation.
- Assessed and managed the current state of data quality.
- Enforced rules for clean data entry and performed data loads to make the data accurate in the system.
- Designed and implemented a solution for Contact de-duplication and duplicate prevention.
- Facilitated salesforce support process for the complicated ticketing process for salesforce users.
- Responsible for Release management

**America Online/Verizon, Dulles, VA**

**March 2008 – July 2017**

**Principal Salesforce Solutions Engineer**

Led the team and managed sales and marketing process - designed sessions, facilitated requirements gathering to understand stakeholders' pain points, and suggested viable solutions. Supported 2000 users and effectively managed case queue. Recognized by various teams for outstanding performance.

- Provided profound Salesforce configuration and data subject matter expertise to the team.
- Involved in roadmap discussions during the blueprint phase, developed RACI models and created WBS for deliverables, communicated and obtained sign-off for the WBS.
- Supported Enterprise Team for systems Integrations as Salesforce SME.
- Worked with salesforce dev team and enterprise DevOps team to troubleshoot issues, development, and successful deployments.
- Implemented SSO, Enterprise Email Integration – Outlook. Migrated Outlook integration to Gmail.
- Provided solution architecture for Configuration, implementation of custom apps, and SF integration with 3rd party Apps to provide robust business solutions.
- Developed test scripts for newly developed functionalities for a flawless user experience.
- Designed, developed, and managed AOL Contract Management process (CLM) in Salesforce.

- Devised and executed go-live strategies around configuration and data (Release Management).
- Established processes for Version Control (SVN), Testing, and deployments (Change set, Flosum).
- Built robust reports and dashboards for end users to measure their team metrics.
- Designed and developed several ETLs for extraction and load between Salesforce and MS SQL server, providing sales teams with revenue forecasts for future quarters.
- Performed Data Mapping between database tables and Salesforce tables, made ongoing enhancements in addition to day-to-day production support for Salesforce and ETL process.
- Performed data migration using Data Loader and ETL tools.
- Provided enhancement and support of the **Order to Cash (OTC)** project.
- Created scenarios and executed integration, performance, and systems testing for programs.
- Supported OTC users as 3rd tier functional support and resolved prioritized production issues.
- Worked with cross-functional teams to implement and improve DevOps CI/CD practices.
- Upgraded programs to n-tier architecture and fully automated interfaces.

**IT Wizards, Herndon, VA**

**October 2005 – February 2008**

**BWI and PI Developer**

- Developer to design, build, and manage SAP integration with other systems.
- BWI developer for organizational reporting.
- Built Data extraction and reports in BWI
- Developed Proof of Concept in SAP PI for the integration.
- Developed data mappings and transformation logic.
- Deployed and supported all integrations.

## Education/Certification /Training

### **5x Salesforce CERTIFIED – All ACTIVE**

Salesforce Certified Sharing and Visibility Designer, 2020

Salesforce Certified Community Cloud Consultant, 2018

Salesforce Certified Advanced Administrator, 2018

Salesforce Certified Platform App Builder, 2016

Salesforce.com Certified Administrator, 2013

### **TRAINING**

Revenue Lifecycle Management, February 2024

Public Sector Solutions, January 2024

OmniStudio, July 2022

### **EDUCATION**

Master of Science - Computer Science, 2003

Bachelor of Science – Mathematics, 1999

## Technical Skills

<b>CRM</b>	Gov Cloud, Sales Cloud, Service Cloud, Experience Cloud, PSS, Financial Cloud, CPQ, CRM Analytics (Tableau), Inbox, Conga Composer, Adobe EchoSign, Clearslide, FreshDesk, Nintex Drawloop, SDocs, SSign,
<b>Marketing Tool</b>	Marketo, Hubspot, Pardot
<b>Data Management/ ETL</b>	Mulesoft, Demand Tools (CRM Fusion), Apex Data Loader, Workbench, Enabler4Excel, Pentaho, SAP BW, SAP PI, Talend, Ab Initio, Cloudingo, RingLead, Gridbuddy, LinkedIn, Clearslide, Duplicate Check, Dupe Blocker
<b>GUI/Tools/Middleware</b>	Eclipse, SharePoint, JIRA, ServiceNow, VersionOne, BMC Remedy, RequisitePro, MS Project, Visio, ClearCase, ClearQuest, Rally, HP Mercury Suite, Toad, Primavera Teamplay, DBArtisan, Knoa, EAI, Confluence
<b>Web Technologies</b>	Web-Logic, SaaS, JDBC, Java (J2EE), XML, HTML, VB, VI editor
<b>DevOps /Change Management</b>	SVN, GitHub, Flosum, Azure, Change Sets, VS Code, Salesforce CLI
<b>Database</b>	SQL Developer, TOAD