Chalke P

Salesforce Business Analyst, 5+ years experience
Mumbai, India
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Salesforce Business Analyst with ~5 years of experience delivering CRM and enterprise system initiatives across global organizations. Strong expertise in requirements elicitation, stakeholder workshops, AS-IS / TO-BE process mapping, user stories, and UAT execution. Hands-on experience translating business needs into scalable Salesforce Sales Cloud and Service Cloud solutions, reporting, workflow automation, and data validation within Agile/Scrum delivery environments.

INDUSTRIES: Financial Services

TECHNICAL SKILLS

• Salesforce Business Analysis	5 years
• Salesforce Service Cloud & Sales Cloud	5 years
• Requirements Elicitation Process Mapping AS IS TO BE	5 years
• UAT Planning Execution Business Validation	5 years
• Agile Scrum Delivery Jira Confluence	5 years

SOFT SKILLS

Stakeholder Management Client Communication & Presentation Trusted Advisor & Consultative Approach Analytical Thinking & Problem Solving Cross-Functional Collaboration Adaptability & Multi-Tasking

PROJECT DETAILS

• Reporting & Workflow Enhancements March-2019 - October-2020

Project Description: Delivered reporting and workflow automation enhancements to improve operational efficiency and data accuracy for enterprise stakeholders. Focused on reducing manual reporting effort and improving system usability.

Responsibilities: Gathered reporting and KPI requirements from business stakeholders Defined functional specifications and supported automation design Validated data accuracy and reporting outputs during UAT Coordinated with technical teams for enhancements and releases Supported post-deployment validation and issue resolution

Technologies: Salesforce Service Cloud, Salesforce Reports & Dashboards, Flow Builder, Data Validation Rules, Jira

Industry: Financial Services

• CRM Implementation & Optimization January-2021 - December-2025

Project Description: Implemented and optimized Salesforce CRM for a global financial services organization to support client onboarding, service operations, and compliance-driven workflows. The project focused on scalable Salesforce-native configurations, automation, and improved user adoption across regions.

Responsibilities: Led requirements discovery sessions and stakeholder workshops Documented business and system requirements, user stories, and acceptance criteria Created AS-IS / TO-BE process maps and gap analysis Supported Salesforce configuration including flows, validation rules, and reports Acted as primary customer-facing analyst during implementation and enhancements Planned and executed UAT cycles, defect triage, and business sign-off Advised stakeholders on platform enhancements and best practices

Technologies: Salesforce Service Cloud, Salesforce Sales Cloud, Flow Builder, Validation Rules, Reports & Dashboards, Jira, Confluence

Industry: Financial Services

EMPLOYMENT HISTORY

• Salesforce Business Analyst December-2020 - January-2026

Description: Led requirements discovery sessions and stakeholder workshops to gather business and system requirements Translated business needs into Salesforce Sales Cloud and Service Cloud user stories and functional specifications Created AS-IS / TO-BE process maps, gap analysis, and acceptance criteria Configured and supported Salesforce solutions including flows, validation rules, reports, and dashboards Acted as primary customer-facing analyst, ensuring alignment between business expectations and delivery Planned and executed UAT cycles, coordinated defect triage, and supported business sign-off Advised stakeholders on platform enhancements, best practices, and workflow optimizations Collaborated with delivery, QA, and technical teams in Agile/Scrum environments

CERTIFICATION

- Salesforce Certified Agentforce Specialist by Salesforce 2024
- Generative AI for Business Analysts by LinkedIn Learning 2023
- Certified Business Analysis Professional (CBAP®) by Starweaver Coursera 2023
- Salesforce Certified Administrator by Salesforce 2022

EDUCATION

- Masters degree in IT Project Management from Welingkar Institute of Management 2021 - 2023

LANGUAGES

- English - native

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