Satish Kumar, Salesforce Cpq

Introduction

Satish is a highly motivated and results-oriented 3 years of hands-on expertise as a Salesforce CPQ consultant. He has a proven track record of successfully implementing and optimizing Salesforce CPQ solutions for a diverse clientele. His in-depth knowledge extends to sales processes, business requirements, and the full spectrum of Salesforce functionality.

He is actively seeking opportunities to leverage his expertise in Salesforce CPQ to drive business growth through the development and implementation of efficient CPQ solutions. Satish's commitment to achieving results and his ability to align CPQ solutions with clients' unique needs make him a valuable asset in the realm of Salesforce consulting.

Relevant experience summary
PROJECT 1 :

Role –Salesforce CPQ Consultant At Closeloop Technology (*Dec 2022- April 2023*)

Responsibilities –
- Successfully led and executed an end-to-end Salesforce CPQ cloud implementation for a leading client, resulting in streamlined quoting processes and increased sales efficiency.
- Configured standalone and bundled products with complex nested bundles and rules to accommodate various pricing scenarios.
- Implemented attribute-guided selling to offer customized product configurations based on customer requirements.
- Collaborated with cross-functional teams to set up product pricing and discount rules, ensuring accurate pricing calculations and compliance with company policies.
- Designed and customized quote templates using both out-of-the-box (OOB) and custom templates to provide professional and multi-language quote documents, improving customer experience and enhancing brand image.
- Implemented advanced approval processes for installations, post-installation services, and quote-level and quote-line level approvals, reducing manual intervention and accelerating the approval cycle
- Led end-to-end Salesforce implementation projects, from requirements gathering to post-implementation support, for clients in various industries.
- Conducted comprehensive stakeholder interviews and facilitated workshops to gather business requirements and translate them into detailed functional and technical specifications.

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Selected Industry Experience
< Salesforce

Technical Experience
- Business Requirement Gathering and Analysis
- Salesforce CPQ Implementation and Customization
- Sales Process Optimization
- Apex and Visualforce Development
- Customer Training and Support
- Documentation and User Guides
- Cross-functional Collaboration
- Jira
- User Story
- BRD And FRD
- Salesforce CPQ Configuration and Customization
- End-to-End Salesforce CPQ Implementation
- Product Setup: Standalone, Bundled, Nested Bundles, Rules, and Attribute-Guided
- Product Price Setup: Pricing and Discount Rules
- Quote Templates: Out-of-the-Box (OOB), Custom, Multi-Language Templates
- Advanced Approvals: Installation, Post-Installation, Quote-Level, Quote Line-Level
- Salesforce CRM Integration

Satish Kumar, CPQ Business Analyst (Kamakhya IT solutions April2020-Nov 2022)

- Created and maintained thorough documentation, including user stories, use cases, process flows, data models, and solution design documents.
- Collaborated closely with Salesforce administrators and developers to design and configure complex Salesforce solutions, leveraging declarative customization and Apex coding when necessary.
- Collaborated with cross-functional teams to gather business requirements and translate them into scalable Salesforce CPQ solutions.
- Led and managed multiple Salesforce CPQ implementation projects, ensuring adherence to project timelines and successful delivery of solutions to clients.
- Conducted thorough analysis of client sales processes and recommended optimizations, resulting in a 20% increase in sales productivity.
- Configured and customized Salesforce CPQ to match unique business needs, including pricing rules, product bundles, discount schedules, and quote templates.
- Worked closely with Sales, Finance, and Operations teams to identify pain points and streamline quote-to-cash processes, reducing turnaround time by 30%.
- Conducted user training sessions and provided ongoing support to ensure smooth adoption of Salesforce CPQ by sales representatives.
- Developed and maintained comprehensive documentation of system configurations, customizations, and user guides.
- Collaborated with developers to design and implement custom Apex triggers and Visualforce pages to extend CPQ functionality.
- Acted as the primary point of contact for Salesforce CPQ-related queries and issues, providing prompt resolutions and excellent customer service.
- Conducted thorough data analysis and data migration activities, ensuring data integrity and seamless data transfer from legacy systems to Salesforce.
- Developed and executed comprehensive test plans, including unit testing, system testing, and user acceptance testing (UAT), to validate system functionality and identify and address any issues or gaps.
- Provided end-user training and support, developing training materials and conducting training sessions to promote user adoption and proficiency in Salesforce.
- Collaborated with stakeholders to identify process improvement opportunities, recommending and implementing Salesforce enhancements that resulted in increased efficiency and productivity.
- Acted as a liaison between business users and technical teams, facilitating effective communication, managing expectations, and resolving project-related challenges.

PROJECT 1

Role – CPQ Developer

Responsibilities –
- Collaborate with cross-functional teams to gather and analyze business requirements for Salesforce implementation projects.
- Assisted in the installation and post-installation activities of Salesforce CPQ, ensuring seamless integration with existing Salesforce instances and third-party applications.
- Played a key role in the product setup, including the creation of product families, product bundles, and nested bundles, as well as defining product attributes for guided selling.

Salesforce CPQ Business Analyst (Kamakhya IT solutions April2020-Nov 2022)

- Worked closely with the pricing team to configure product prices, discount rules, and tiered pricing structures, resulting in accurate and competitive pricing for different customer segments.
- Collaborated with the sales team to gather requirements and customize the approval processes using Salesforce Flows, enhancing the efficiency of the sales approval process.
- Conducted in-depth interviews and workshops with stakeholders to elicit and document clear and comprehensive functional and technical specifications.
- Created and maintained detailed documentation, including user stories, use cases, process flows, data models, and functional design documents.
- Worked closely with Salesforce administrators and developers to design and configure Salesforce solutions aligned with business requirements.
- Implemented customizations and configurations, including custom objects, fields, validation rules, workflows, process builder, and Lightning App Builder.
- Conducted thorough data analysis to ensure data integrity and successful data migration from legacy systems to Salesforce.
- Led user acceptance testing (UAT) efforts, developed test plans, and coordinated testing activities to validate system functionality and address any issues.
- Developed and delivered end-user training sessions, user guides, and documentation to promote user adoption and enable effective use of Salesforce.
- Collaborated with stakeholders to identify areas for process improvements and system enhancements, resulting in increased efficiency and productivity.