

PRATIK MISTRY

AGILE AI, PMP, SCRUM MASTER AND 8X SALESFORCE CERTIFICATIONS

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ABOUT ME

Pratik is a successful Salesforce implementation consultant, agile project manager and scrum master with more than 30 CRM implementations focusing on Service Cloud, Sales Cloud, Experience Cloud and Einstein.

With over 10 years of Agile practitioner and 8 years of expertise in Salesforce implementation in Commercial and federal orgs, his focus is driving project development and process management to resolve complex issues. He specializes in solution implementation across in salesforce and integration with multiple platforms.

As a Successful project manager, worked with cross functional teams, on-shore and off-shore leading to improved time and team management skills. He excels in bridging the gap between complex technical requirements and business goals, leveraging his deep understanding of Salesforce to deliver tailored solutions that drive efficiency, enhancing customer engagement. His strategic approach to project management, combined with a hands-on leadership style, ensures projects not only meet but exceed stakeholder expectations, fostering innovation and continuous improvement within teams.

SKILLS

Salesforce Clouds – Sales cloud, Service cloud, Gov cloud, Education cloud, Commerce, Field Service Lightning, Health Cloud, CPQ, Experience cloud, Non-Profit cloud

Team Lead – Empower stewardship, Tailor solutions, self-organizing agile environment.

Project Manager – Microsoft Project, JIRA, Agile Accelerator, Asana, Trello, Click up etc.

SDLC Implementation – Agile development, Waterfall, Hybrid Approaches

Product Owner – Product Backlog Management, Agile Practitioner, Team development, Sprint Ceremonies.

Business Analyst – Requirements Gathering, Elicitations, UAT, Integration and Regression QA testing.

Salesforce 360 – Lightning and Classic, Sandbox, Lightning Component, Einstein Analytics, Copilot.

Data Integration – SAP, Magento, DocuSign, NetSuite, Shopify, Zapier, MuleSoft, Custom API Integration.

CERTIFICATIONS

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| Field Service Cloud Consultant | Feb 2024 | Salesforce Certified Business Analyst | Feb 2023 |
| Salesforce Associate | Jan 2024 | Salesforce Service Cloud Consultant | Aug 2022 |
| AGILE AI CERTIFIED | Dec 2023 | Salesforce Sales Cloud Consultant | Dec 2021 |
| Salesforce AI Associate | Sept 2023 | Salesforce Platform App Builder | May 2020 |
| Project Management Professional | Aug 2023 | Salesforce Administrator | Aug 2019 |

EDUCATION

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| Masters in Business Information Systems <i>University of Maryland- Robert Smith School of Business</i> | Dec 2015 |
| Masters in Technology Management <i>NMIMS University- Mumbai University</i> | Aug 2014 |
| Bachelors in Information Technology <i>NMIMS University- Mumbai University</i> | Aug 2013 |

SALESFORCE IMPLEMENTATIONS AND EXPERIENCE

SALESFORCE CONSULTANT

(2024 - Present)

FIELD SERVICE IMPLEMENTATION

Objective:

- Address inefficiencies in resource scheduling, lack of real-time data access, and difficulties in managing field operations to enhance service delivery, reduce operational costs, and improve customer satisfaction.

Approach:

- Analyzed customer issues and challenges in field service management.
- Designed tailored solutions and created detailed system architecture.
- Developed custom automation tools within Salesforce Field Service to improve operational efficiency.
- Created detailed flow diagrams to illustrate each step of the service process, ensuring clarity and transparency.
- Managed stakeholder expectations throughout the project lifecycle, aligning visions and setting actionable paths for development and implementation.
- Tested and implemented solutions in collaboration with clients, ensuring thorough approval at each stage.
- Conducted comprehensive training for the client's team, empowering users to maximize the benefits of the new tools.

Key Achievements:

- Enhanced operational efficiency and service accuracy through custom automation.
- Reduced service delivery delays and operational costs.
- Improved overall customer satisfaction by providing real-time data access and streamlined field operations.

SALES CLOUD IMPLEMENTATION – MULTIPLE TERRITORIES AND INTEGRATION

Objective:

- Enhance the sales capabilities and regional adaptability of 20 sales representatives across three distinct territories in North America by implementing a comprehensive Sales Cloud Process tailored to the Hardware industry.

Implementation Process and Strategy:

- Recognized diverse currency and regional requirements, implementing a multi-currency system to accommodate distinct economic environments.
- Configured products and price books to align with specific offerings and pricing strategies of the regions.
- Integrated Salesforce with Outlook to enhance communication efficiencies, ensuring a fluid exchange of emails.

- Facilitated better collaboration among sales teams by streamlining communication processes.

Key Achievements:

- Streamlined sales operations across multiple territories, enabling tailored approaches to different market dynamics.
- Improved the management of regional sales activities through detailed configuration and customization.
- Optimized communication flow with Outlook integration, enhancing response times and overall productivity.
- Positioned client for increased sales effectiveness and expanded regional reach.

SERVICE CLOUD IMPLEMENTATION WITH EXTERNAL API INTEGRATION

Objective:

- Enhance case management efficiency for an HVAC System and Distribution client by automating the process of case generation using information integrated from their SAP system.

Implementation Process and Strategy:

- Developed an automated case generation process leveraging real-time data from SAP system via API integration.
- Designed a solution to support internal customer service and relationship management teams in managing warranty claims more efficiently.
- Reduced manual entry errors by automating data transfer between SAP and Salesforce.
- Integrated Outlook email to streamline communication between departments and customers.

Key Achievements:

- Achieved a 90% reduction in response times and manual processing errors.
- Improved the productivity of the customer service team by 50%.
- Enhanced overall customer experience by providing faster and more accurate service.

WORK EXPERIENCE

PROJECT MANAGER – CORESPHERE

(2020 - 2024)

CLIENT: GOVERNMENT PUBLISHING OFFICE

- Collaborated with clients to elicit, document, and translate intricate business requirements into tailored solutions for Salesforce CRM. Salesforce implementation encompassed areas of Customer portal development and management, self-service case management, implementation of custom solutions.
- Lead implementation of Service Cloud and Experience Cloud, strategically enhancing cloud migration. Manage every phase of the implementation process, ensuring seamless integration and unifying big data.
- Provide dedicated support to project resources by identifying and removing bottlenecks. Nurture a self-organized project environment, fostering teamwork, and ensuring projects meet milestones and objectives.
- Implement product strategic initiatives with a strong focus on leveraging Agile Salesforce methodologies and solutions. Leverage Salesforce knowledge to drive key metrics and enhance overall business performance.
- Conduct engagement sessions with clients, facilitate project timeline meetings, and perform rigorous risk assessment and management.

CLIENT: PUBLIC SECTOR : DEPARTMENT OF LABOR

- Led the integration of Tableau CRMA for the DOL's Timekeeping and Office Personnel Management project, establishing seamless data streams from Salesforce to Tableau, enhancing the analytic capabilities for workforce management and operational efficiency.
- Developed and managed sophisticated data recipes in Salesforce Analytics, enabling the automatic consolidation, transformation, and analysis of large datasets related to timekeeping and personnel management, improving data accuracy and decision-making processes.
- Designed and deployed comprehensive dashboards and reports within Tableau, providing DOL executives and managers with real-time insights into personnel allocation, timekeeping anomalies, and office efficiency metrics, significantly contributing to informed strategic planning and resource optimization.

INTERNAL OPERATIONS

- Oversee a team of Business Analysts. Provide hands-on leadership and guidance to ensure seamless collaboration within a Scrum framework. Help potential admins with a guided path to become better salesforce administrators providing useful resources and trailhead trainings.
 - Performed duties as an Agile Coach, mentoring and helping project teams to streamline internal processes with Agile specifics and ground principles.
 - Lead interviews for prospective candidates, identifying top talent to strengthen team and support project objectives. Collaborate with HR to evaluate and build candidate performance improve Project teams.
 - Mentorship Program Lead: I led a mentorship program for three consecutive years, empowering new joiners and employees seeking growth opportunities by facilitating meaningful connections with mentors.
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INTEGRATION ANALYST – LIFEMATTERS

(2020 - 2020)

- **Requirements Gathering and Product Management:** Played a pivotal role in gathering and refining requirements for Salesforce integration projects. Collaborated closely with stakeholders to define clear objectives, scope, and deliverables. Effectively translated these requirements into actionable plans, contributing to seamless integration implementations.
 - **Unified Data Management:** Spearheaded the integration of Salesforce with external systems such as Invoicing.com, HappyFox, AlayaCare, and DocuSign. This initiative successfully streamlined and unified customer data within the Salesforce Sales Cloud. The result was a centralized hub for data management, which significantly improved sales pipeline visibility, enhanced lead conversion rates, and supported sales representatives in their day-to-day processes.
 - **Business Analyst Expertise and Agile Program Management:** Proficiently employed Agile methodologies, JIRA, Confluence for program management. Utilized Salesforce Einstein Analytics for data-driven insights. Ensured precise, on-time, and budget-compliant project execution, consistently exceeding client expectations.
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PRODUCT OWNER – OPTUM

(2019 - 2020)

- Spearheaded Salesforce implementation initiatives for healthcare clients located in FL, WA, CA, and CO, serving as the primary bridge between clients and development teams.
 - Conducted thorough product requirement gathering, delving into day-to-day challenges to devise innovative solutions guided by sound solution architecture.
 - Orchestrated Agile framework practices to administer user licenses, identity, and security management, ensuring streamlined product development and facilitating continuous improvement procedures.
 - Actively engaged with clients in Agile-oriented sessions, ensuring their needs were comprehensively addressed and facilitating seamless project progression.
 - Provided expert guidance to development teams, overseeing the work process in JIRA to guarantee efficient project execution and client satisfaction.
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Salesforce Operations Support Specialist – DC PUBLIC WORKS

(2017-2019)

- Played a pivotal role in supporting the Department of Public Works in DC, focusing on Salesforce operations to efficiently manage data acquired from Solid Waste Management and Parking Enforcement, both critical aspects of city operations.
 - Spearheaded the creation of a multitude of Tableau reports by seamlessly integrating data from Salesforce and various databases using PostGreSQL.
 - Facilitated real-time access to analytic insights by executives, enabling them to access vital information on their smart devices during public hearings.
 - Ensured the presentation of crucial data to inform decision-making and policy discussions, contributing to more informed and effective public service operations.
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OPERATIONS ANALYST – *TE CONNECTIVITY*

(2014-2017)

- Contributed significantly to the Subsea Communication Division by providing valuable support for ship transit and operations through data analytics, web platform development, file management, and data operations.
- Actively managed and analyzed data pertaining to ship transit and planning, orchestrating the collection, processing, and interpretation of data.
- Leveraged data-driven insights to drive operational optimization and enhance efficiency within the maritime logistics sector, resulting in improved processes and resource allocation.