



# PRATIK MISTRY

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PORTFOLIO: [YOURSALSFORCEBUDDY.COM](https://YOURSALSFORCEBUDDY.COM)

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## ABOUT ME

Pratik is a successful Salesforce implementation consultant, agile project manager and scrum master with more than 15 years of experience.

With 10 years of expertise in Salesforce implementation in Commercial and federal organization, his focus is solving complex business problems by implementing salesforce and fine tuning to customer requirements. He specializes in solution implementation across in salesforce and integration with multiple platforms.

As a Successful consultant, 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.

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## SKILLS

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

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

**SDLC Implementation** – Agile development, Waterfall, Hybrid Approaches, Project RoadMap.

**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** – CTI, SAP, Magento, DocuSign, NetSuite, Shopify, Zapier, MuleSoft, Custom API.

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## CERTIFICATIONS

User Experience Design Consultant	July 2024	Salesforce Certified Business Analyst	Feb 2023
Field Service Cloud Consultant	Feb 2024	Salesforce Service Cloud Consultant	Aug 2022
Salesforce Associate	Jan 2024	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

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## EDUCATION

**Masters in Business Information Systems** | *University of Maryland- Robert Smith School of Business* Dec 2015

**Masters in Technology Management** | *NMIMS University- Mumbai University* Aug 2014

**Bachelors in Information Technology** | *NMIMS University- Mumbai University* Aug 2013

**FIELD SERVICE IMPLEMENTATION**

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

**Implementation Process and Strategy:**

- Analyzed customer issues, developed custom automation tools, created flow diagrams, managed client expectations, and collaborated with clients for solution testing and implementation.

**Key Achievements:**

- Enhanced operational efficiency, reduced service delivery delays and costs, and improved customer satisfaction with real-time data access.

**SALES CLOUD IMPLEMENTATION – MULTIPLE TERRITORIES AND INTEGRATION**

**Objective:** Enhance the sales capabilities and regional adaptability of 20 sales reps across three distinct territories in North America by implementing a comprehensive Sales Cloud Process tailored to the manufacturing industry.

**Implementation Process and Strategy:**

- Implemented multi-territory system, configured products and price books, integrated Outlook, and facilitated better collaboration among sales teams.

**Key Achievements:**

- Streamlined sales operations, improved regional management, and optimized communication flow.

**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 automated case generation using SAP data, designed support solutions, reduced manual entry errors, and integrated Outlook for streamlined communication.

**Key Achievements:**

- Achieved a 90% reduction in response times, improved customer service productivity by 50%, and enhanced customer experience.

**SERVICE CLOUD AND OMNI CHANNEL INTEGRATION – GLOBAL PUBLISHING OFFICE**

**Objective:** Implement a comprehensive customer service solution integrating Salesforce Service Cloud, Omni-Channel, and CTI to enhance customer engagement and streamline support operations.

**Implementation Process and Strategy:**

- Deploy Service Cloud, integrate Omni-Channel and CTI, guide customer conversations, and utilize Experience Cloud for enhanced self-service, Case Integration and Case Routing.

**Key Achievements**

- Launched an integrated customer service platform with omnichannel support, enabling efficient call routing and assignments, improved customer support, skill management, and a knowledge article platform for agents.

**CTI IMPLEMENTATION – GLOBAL PUBLISHING OFFICE**

**Objective:** Integrate Salesforce CTI to enhance customer service operations and streamline claim processing.

**Implementation Process and Strategy:**

- Collaborated on pre-sales discovery, conducted requirement analysis, enabled CTI, configured Call Center settings, set up workflows, and provided user training and support.

**Key Achievements**

- Improved response times, automated claim processing, and empowered service agents with task management.

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## WORK EXPERIENCE

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### **SALESFORCE PRINCIPAL - RailBot Solutions LLC (Independent)** (2024- Present)

- Led multiple Salesforce implementations across Sales, Service, and Experience Clouds, delivering tailored solutions that enhanced client operations, increased efficiency, and improved customer satisfaction.
  - Consult cross-functional teams in the integration of Salesforce with external systems via MuleSoft or other third applications creating flow of data to improve business operations.
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### **APPLICATION ARCHITECT – SABERPOINT** (2023 - Present)

**Client: Skyline Solar:** Implemented end-to-end Field Service solutions to optimize operations and enhance service delivery.

**Client: A+ Products:** Integrated SAP with Salesforce to streamline the sales process, automated internal processes and order management system.

**Client: Russel Sigler:** Integrated Magento with Salesforce to automate case creation, routing to end customers in PDF format, and established a case management process for the internal team.

**Client: Police Security:** Implemented CTI integration to maximize the throughput of incoming calls and manage cases and customer data efficiently.

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### **PROJECT MANAGER – CORESPHERE** (2020 - 2024)

#### **CLIENT: GOVERNMENT PUBLISHING OFFICE**

- Collaborated with clients to translate business requirements into tailored Salesforce CRM solutions, leading Service and Experience Cloud implementations, managing integration of CTI Platform, Omnichannel implementations, Chatbot and AI Integration with Azure implementation via Agile methodologies.

#### **CLIENT: PUBLIC SECTOR : DEPARTMENT OF LABOR**

- Led the integration of Tableau CRMA for DOL's Timekeeping and Personnel Management project, developing data recipes in Salesforce Analytics, and deploying dashboards to enhance analytic capabilities, data accuracy, and strategic decision-making.

#### **INTERNAL OPERATIONS**

- Oversaw a team of Business Analysts within a Scrum framework, provided Salesforce admin training, served as an Agile Coach, led candidate interviews, and managed a mentorship program to empower employees.
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### **INTEGRATION ANALYST – LIFEMATTERS** (2020 - 2020)

- Played a pivotal role in gathering and translating requirements for Salesforce integration projects, spearheading the integration with external systems to streamline data management, and employing Agile methodologies and Einstein Analytics for precise project execution and enhanced sales pipeline visibility.
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### **PRODUCT OWNER – OPTUM** (2019 - 2020)

- Spearheaded Salesforce implementation for healthcare clients, conducted requirement gathering, administered Agile practices for user management, actively engaged clients in Agile sessions, and guided development teams to ensure efficient project execution and client satisfaction.
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### **SALESFORCE OPERATIONS ANALYST – DC PUBLIC WORKS** (2017-2019)

- Supported the Department of Public Works in DC by managing Salesforce data creating Tableau reports via PostgreSQL integration and enabling real-time analytic insights for executives to inform decision-making.
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### **OPERATIONS ANALYST – TE CONNECTIVITY** (2014-2017)

- Supported the Subsea Communication Division by managing and analyzing ship transit data, developing web platforms, and leveraging data-driven insights to optimize maritime logistics operations.