Contact

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Top Skills

Sales Processes
Jira
Salesforce Lightning

Languages

English
Hindi
Marathi
Konkani

Certifications

Six Sigma Yellow Belt
Business Process Improvement
Advance Excel with VBA
What Is Scrum?
SQL Server

Vinayak Kamat

Salesforce Consultant/Business Process Improvement/Sales
Operation
Mumbai, Maharashtra, India

Summary

Business process improvement, Business Analyst, Tableau,
Dashboards, Power BI, MIS Reports, VBA, Data Analyst,
Forecasting, Advance Excel, Microsoft PowerPoint, SQL, ERP,
Salesforce, Presentation, Six Sigma.

Experience

LSEG (London Stock Exchange Group)
Sales Process Specialist-Business Operation- ASEAN & South Asia
June 2021 - Present (1 year 4 months)
Mumbai Area, India

• Study and document the end-to-end Quote-to-Cash process from quoting to
contracting, provisioning, and invoicing for all LSEG products.
• Develop a strong understanding of all Refinitiv/LSEG entity's business
models and product offerings
• Work with cross-functional teams including Sales, CSM's, Finance and
Legal to review and document peripheral process touch points with Sales Ops
processes.
• Work with Order Management and up/downstream teams to identify and
resolve process pain points using Business Process Improvement and through
system enhancements
• Identify automation and optimization opportunities across the QTC lifecycle
• Represent the Sales and Account Management (SAM) team in all enterprise
project meetings, and own/drive the enhancement roadmap with our IT teams
• Act as a liaison between SAM/Order management and our IT/technical teams
• Manage defects and enhancements including identification, resolution, and
communication to business partners in the Sales organization
• Serve as a point of contact and subject matter expert on Refinitiv/LSEG
business, operational Tools, processes questions & issues, including Skills
Training and Onboarding new SAM Users.
• Own requirements & Process documentation including BRDs, QRG, process
flows, or other assets used to collect business needs
• Perform systems administration on sales systems/tools

• Work with business owners and IT to prioritize change requests

• Participate in user acceptance, smoke testing, and implementation activities.

Thomson Reuters. - (Sold to Blackstone in 2018, later named as Refinitiv-an LSEG Business)
Sales Support Specialist
April 2017 - June 2021 (4 years 3 months)
Mumbai, Maharashtra, India

• Act as first line support for Account Managers on order process and system queries

• Liaise with Order Management Specialists (OMS) to provide administrative support for quote to cash cycle including:

Order processing support

Credits procedures incl. billing accuracy and reconciliation, appropriate escalation and support resolution

Entitlements support such as permission error handling, user list pulls and sends, etc.

Document handling – Accuracy of order forms, contract franking and follow-ups, support obtaining signed contracts and order forms from customers, process and validate cancellation requests/terms

Manage indexing and storage of signed contracts and order form hard copies, handle contract and order form copy retrieval requests

• Develop customer relationships to address administrative issues, working closely with internal stakeholders to resolve issues

• Administer complex deals in collaboration with Account Managers and OMS

• Manage Free Trials for setup and extension

• Respond to ad hoc data requests from sales management

• Monitor Account Managers' pipeline clean-up, accuracy, and adherence to best practices

• Work closely with the Business Operations lead

• Strengthen working relationship with OMS and other support functions such as credit control, Sales Process etc.

• Play a supporting role in the annual price increase process e.g. reporting on contractual exceptions and business exceptions.

Monginis
Business Analyst
April 2015 - September 2016 (1 year 6 months)

• Integrating Excel with various databases like SQL server for Data maintenance & Quick retrieval data from dumped Excel files and store them in database.
• Using SQL queries to retrieve custom reports, create tables, Delete Database, Insert Data, Database management, and many more functions.
• Monitoring and analyzing daily Sales figures / Retail/Franchise wise and comparing it with Business Plan for ensuring the organizational growth.
• Analysis of Sales Trends Brand wise / Business wise at State / Distributor level.
• Monthly sales reporting analysis by product and category - highlighting variances for the month and the year to date viz. Distributor Sales Analysis & Variance Analysis
• Incentive calculation for Sales Employees / Distributor reward and incentive program. Monitoring the performance of Sales employee.
• Responsible for Collecting & analyzing information from the market about products for better sale, including data collection, data analysis & data presentation.
• Working closely with business head to provide analytical support.
• Provided technical support to clients for all Ad-hoc Reports, escalating issues etc.

Mahindra & Mahindra
MIS Analyst
January 2013 - April 2015 (2 years 4 months)

• Design and develop reports for Sales reps and Sales managers globally using Tableau.
• Developed quarterly Monthly reports on the major competitors in the industry and current industry trends.
• Preparation of volumes report, quality reports and ensuring that the MIS is recorded accurately and on time.
• Collecting, collating and carrying out complex data analysis in support of Management & customer requests. Also involved in reporting statistical findings for senior managers and Business Head.
• Coordinating with Export Department for Container Sales invoices and generating Collection report week wise and month wise at Operational and Business head level.
• Assist in analyzing financial information and reports to provide accurate and timely financial analysis that can form a base of recommendations to management for decision making purposes.

• Assisted purchasing and logistics Team in creating a delivery schedule that would keep each Pack houses with most popular products.
• Analyzed data and translated them into graphical presentation so it can be easily understood by the Senior Manager & Business Head.
• Assist in preparing presentations to CEO and Senior Management Team.

Nextservices
Associate
March 2010 - December 2012 (2 years 10 months)

• Generating weekly collection reports, Delinquent Account Reports, Reimbursement Reports, patient Balance Reports, Charges vs. Payments reports, AR Summary Reports, Quarterly Analysis reports, KPI reports etc.
• Collect data in form of reports from different departments of the organization and compile them together to prepare a summarized report
• Generating CNR (Charge Not Received) reports through automated tool and verifying them.
• Payments posting for patient and through ERA, check, Visa and others.
• Insurance Payments posting
• Billing of Charges as per physician's notes
• Verification of patient insurance through online, IVR or through insurance calling

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Education

Symbiosis Institute of Business Management
Post graduate Diploma in Operation Management, Operation Management · (2014 - 2015)

The ICFAI University, Tripura
Master's degree, Statistics · (2012 - 2014)

Mumbai University Mumbai
Bachelor's degree, Statistics · (2005 - 2008)