

RAFAEL RICH

BUSINESS SYSTEMS CONSULTANT

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PROFESSIONAL SUMMARY

Business systems consultant with 7+ years of experience supporting companies and client organizations through systems analysis, process improvement, software implementation, workflow automation, and operational transformation. Skilled at translating business needs into practical system requirements, scalable workflows, integrations, SOPs, testing plans, and adoption strategies. Comfortable working directly with business leaders, operations teams, vendors, and technical stakeholders in remote and cross-functional environments.

CORE COMPETENCIES

Business Systems Analysis • Requirements Gathering • Process Mapping & Optimization • Workflow Automation • CRM / ERP Implementation • Systems Integration • UAT & Test Planning • Data Migration • Reporting & Dashboards • SOP Development • Change Management • Client Consulting • Vendor Coordination • Agile / SDLC

PROFESSIONAL EXPERIENCE

Independent / Contract Business Systems Consultant | Multiple Client Engagements

Aug 2023 – Present

Philippines / Remote

- Lead discovery sessions with business owners and functional teams to document current-state processes, pain points, system gaps, and future-state requirements.
- Design practical business-system solutions covering customer management, intake, operations, communications, billing, reporting, and internal workflow automation.
- Translate stakeholder needs into business requirements, process maps, user stories, functional specifications, configuration plans, and implementation roadmaps.
- Configure and improve cloud-based business applications, workflow tools, forms, dashboards, and integrations; coordinate technical work with developers and third-party vendors when needed.
- Plan and facilitate user acceptance testing, issue tracking, data validation, go-live readiness, user training, and post-launch stabilization.
- Create SOPs, process documentation, system guides, and governance standards that help client teams adopt new workflows consistently.
- Manage multiple client workstreams at once while communicating scope, risks, dependencies, decisions, and next steps to both business and technical stakeholders.

Business Systems Consultant | NexBridge Business Solutions

May 2021 – Jul 2023

Metro Manila, Philippines

- Consulted with client teams to evaluate business processes and identify opportunities to simplify work, reduce manual handoffs, and improve system visibility.
- Supported end-to-end system implementations from requirements and solution design through configuration, testing, deployment, and user support.
- Partnered with operations, finance, sales, customer service, and IT stakeholders to define workflows and ensure system changes aligned with real business needs.
- Built and maintained process documentation, requirements traceability, test scenarios, defect logs, training materials, and implementation status reporting.
- Assisted with data cleanup, mapping, migration validation, and reconciliation during system transitions and platform upgrades.
- Facilitated client workshops, status meetings, and solution reviews, helping stakeholders make decisions and resolve implementation blockers.

Metro Manila, Philippines

- Gathered and documented business requirements for internal systems, client-facing tools, operational workflows, and reporting needs.
- Mapped existing processes and collaborated with stakeholders to define more efficient future-state workflows and system controls.
- Supported application enhancements by preparing requirements, coordinating testing, validating results, and documenting changes for end users.
- Tracked defects, change requests, action items, and project dependencies while working closely with technical teams and business users.
- Prepared recurring reports and analysis to help managers monitor workflow performance, data quality, and operational issues.
- Provided user support, system documentation, and training assistance during new releases and process changes.

SELECTED CONSULTING PROJECT HIGHLIGHTS

- CRM & Customer Journey Modernization — Reworked lead intake, customer records, follow-up workflows, task routing, and management visibility for a growing service business.
- Operations Workflow Automation — Converted manual handoffs and repetitive administrative steps into standardized digital workflows with approvals, notifications, and exception tracking.
- Systems Integration & Data Migration — Supported field mapping, data cleansing, validation, migration testing, and cross-system coordination during platform changes.
- Reporting & Management Visibility — Defined operational KPIs and built requirements for dashboards and recurring reports that gave leaders clearer visibility into workload, pipeline, service levels, and exceptions.

TOOLS & METHODS

Business Analysis: requirements workshops, stakeholder interviews, process mapping, use cases, user stories, gap analysis, UAT, root-cause analysis

Platforms: Salesforce, HubSpot, Zoho CRM, Microsoft Dynamics 365, Airtable, Power Automate, Zapier, Make, Microsoft 365, Excel / Google Sheets, Jira / Confluence, Power BI / Looker Studio

Delivery Methods: Agile / Scrum, SDLC, implementation planning, change management, training, SOPs, issue and risk tracking

EDUCATION & CREDENTIALS

Bachelor of Science in Information Systems — Polytechnic University of the Philippines, Manila, Philippines | 2019

Professional development: Agile Business Analysis, Process Improvement, Power BI Reporting, and Workflow Automation