

# Karthik Kasala

## Contact Info

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## Certifications and Skills

Salesforce Certified Administrator

Classic to Lightning Migrations

Lightning Implementations

Change Management

Lightning Flow

SSO & Integrations

## Educational Experience

University of North Carolina - Wilmington,  
Accountancy, M.S.

East Carolina University,  
Quantitative Economics, B.S.

## Professional Experience

Nov 2021 –  
Nov 2024

### Salesforce Administrator/Jr. Developer

*Marcum LLP - Philadelphia, PA*

- Administered a Salesforce Lightning org for 720 users at a top 10 accounting firm, ensuring 100% SOX compliance.
- Led a 9-month Salesforce implementation, successfully transitioning from Microsoft Dynamics and HubSpot, which improved cross-departmental data alignment by 40% and increased CRM adoption by 200%.
- Investigated CRM pain points through stakeholder interviews and system log analysis, developing targeted testing scenarios. Executed tests with 100% alignment to business requirements and delivered enhancements on time.
- Integrated custom solutions with Flow, Apex, and LWCs for client and engagement creation into Deltek ERP while incorporating InTapp iPaaS to allow 2800 non-Salesforce users to enter data.
- Executed the migration of 100% of workflow rules and Process Builder processes to Flow.

July 2018 –  
Nov 2021

### Salesforce Administrator

*FS Investments - Philadelphia, PA*

- Administered Lightning Salesforce org with 300 users for a \$20B+ AUM alternative investments firm.
- Transitioned many workflow rules and Process Builder flows to Lightning Flow to observe Salesforce best practices and maximize efficiency, especially pertaining to order of execution and governor limits.
- Collaborated daily with sales operations and platform strategy teams while managing third party integrations such as Marketo, Conga, and OpenPrise.
- Implemented configuration/automation via case management so end users can minimize pain points and maximize productivity in Service Cloud.
- Created territory focused reporting and dashboards so business development and sales teams could focus efforts on prospects that would yield the highest returns in Sales Cloud.
- Spearheaded efforts to transition organization from Classic to Lightning over an eight-month project for Sales/Distribution and Client Relations teams, before going firm-wide.
- Organized articles into a collective Knowledge Base and provides training for end users to better utilize new Salesforce functionality.
- Applied gathered knowledge in change management, Data Loader, Excel, Flow, and release updates to set up production environment for success.

Jan 2018 –  
June 2018

### Salesforce Project Coordinator

*CSS Technical Services - Media, PA*

- Assisted implementation Partner that oversaw Implementations, managed services, Lightning Migrations, and org optimization for local, national, and international clients.
- Worked with key client stakeholders to understand business challenges, gather business requirements, and develop a roadmap to reach future state goals and achieve scope success in projects.
- acted as salesforce administrator for internal 100% Lightning-migrated org while using Quip, Slack, and TaskRay for project management.
- Managed User Requests, Dashboards, Reports, Forms, Templates, Page Layouts, Point and Click Automation, Custom Objects, Standard and Custom Fields.

Sep 2017 –  
Dec 2017

### Linux Technical Specialist

*Linode - Haddonfield, NJ*

- Worked within Client Support team to resolve client server and Linux application issues in fast-paced startup environment.
- Delivered high level and detailed solutions to customers via support tickets, email, IRC, and phone calls while identifying and escalating recurring issues to system and network engineers.

Sep 2016 –  
Mar 2017

### Salesforce Operations Analyst

*Windsor Circle - Durham, NC*

- Worked closely with Director of Data Services to identify areas for improvement, implement automation, and increase reporting efficiencies for clients' weekly, monthly, and requested ad hoc reporting.
- Acted as the central hub within Salesforce for both client success & internal inquiries, ensuring proper routing, escalation, and timely responses when addressing client issues for assigned client portfolio of over 120 clients.