PORTFOLIO / SPECIALIST PROFILE

Better systems. Less friction. More clarity.

I build and maintain the systems behind the customer journey: lead capture, CRM pipelines, conditional follow-up, appointments, integrations, and reporting.

MY SPECIALTY

End-to-end CRM implementation and technical operations, with a focus on reliable logic, clean handoffs, and practical documentation.

CORE CAPABILITIES

CRM architecture
Pipelines, tags, fields, calendars

Workflow automation
Lead journeys, reminders, reactivation

Connected tools
Zapier, webhooks, integrations

Messaging operations
Email/SMS, A2P, notifications

Tracking & analytics
GA4, Meta Pixel, RedTrack

QA & documentation
Testing, troubleshooting, handoff

REMOTE / PHILIPPINES-BASED / US TEAM COLLABORATION

01 / HOME SERVICES / CRM IMPLEMENTATION

A connected CRM for a service business

A complete lead-management and follow-up system for a home-service team.

SYSTEM FLOW / ILLUSTRATIVE

Inquiry > CRM > Follow-up > Handoff

BUSINESS NEED

The business needed a predictable way to handle new inquiries, missed calls, estimates, customer replies, appointments, and review requests without losing the human handoff.

MY RESPONSIBILITY

CRM planning, workflow architecture, GoHighLevel configuration, QA, and a client-facing operational handoff.

WORK DELIVERED

- Built lead intake, pipeline structure, tags, and missed-call text-back.
- Configured new-lead and estimate follow-up sequences with response-based exits.
- Created appointment reminders, unanswered-message alerts, and review routing.
- Completed testing, client documentation, and activation after approval.

DELIVERY STATUS / OUTCOME

Core workflows were activated and the system was monitored as the client began using it. No unsupported uplift or revenue claims are included.

02 / INSURANCE / LEAD AUTOMATION

From website inquiry to scheduled call

Connected custom website forms to a CRM, booking calendar, and lead nurture journeys.

SYSTEM FLOW / ILLUSTRATIVE

Web form > Webhook > CRM > Booking

BUSINESS NEED

Multiple custom-coded forms were posting into a shared webhook. The process required form-source identification, accurate field mapping, a phone-call calendar, and clear follow-up states.

MY RESPONSIBILITY

Full CRM setup, Zapier mapping, workflow configuration, messaging compliance setup, testing, and quick-start documentation.

WORK DELIVERED

- Mapped form identifiers and page URLs into contact and pipeline records.
- Configured appointment booking, confirmation, reminders, and rebooking logic.
- Built new-inquiry and no-booking journeys with duplicate-prevention checks.
- Supported A2P registration and delivered CRM handoff documentation.

DELIVERY STATUS / OUTCOME

Forms, calendar, and approved automations were configured and launched following testing. No third-party AI integration outcomes are claimed.

03 / MARKETING AGENCY / OPERATIONS

Supporting a connected growth stack

Maintained automations and tracking across an agency CRM and marketing technology environment.

SYSTEM FLOW / ILLUSTRATIVE

Funnel > Events > CRM > Sales

BUSINESS NEED

Funnel variants, calling tools, CRM nurture campaigns, tracking scripts, and sales handoffs depended on consistent workflows and accurate event capture.

MY RESPONSIBILITY

CRM automation operations, tool troubleshooting, campaign setup, technical QA, and coordination with sales and marketing stakeholders.

WORK DELIVERED

- Created booking/no-booking paths with qualification and reply-based stop logic.
- Supported database reactivation campaigns and manual sales follow-up routing.
- Assisted CloudTalk migration, dialer/SMS testing, and automation adjustments.
- Checked Meta Pixel, GA4, RedTrack, Shopify and funnel tracking configurations.

DELIVERY STATUS / OUTCOME

Operational workflows and tracking setups were implemented and maintained. Campaign impact is not overstated or represented by unverified conversion metrics.