

Jomar Palmes

CRM & Automation Systems Specialist | GoHighLevel

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PROFILE

CRM and automation specialist with a background in insurance operations, client management, and web development. Builds GoHighLevel workflows, pipelines, and integrations that support lead follow-up, client servicing, and retention.

CORE SKILLS

CRM & automation

GoHighLevel (GHL), Zapier, workflow automation

Client operations

Pipelines, appointment reminders, follow-ups, lifecycle and retention systems

Integrations

APIs, webhooks, data handling, system logic

Process improvement

Requirements gathering, troubleshooting, operational support

Web development

WordPress, HTML, CSS, JavaScript, PHP

Digital performance

Landing pages, lead capture, technical SEO

PROFESSIONAL EXPERIENCE

CRM & Automation Specialist

Insurance Industry | Present

- Build and maintain GoHighLevel workflows and CRM pipelines for insurance lead management and client servicing.
- Configure appointment reminders and follow-up sequences to support timely communication across the client lifecycle.
- Develop lifecycle and retention systems, connecting tools and data through webhooks and API integrations.
- Troubleshoot automation issues, improve processes, and provide day-to-day systems and operational support.

Education Solutions Manager

First Datacorp - Pisara Solutions Unit | Jul 2025 - Apr 2026

- Optimized CRM pipelines for lead tracking, follow-ups, and conversions; identified process gaps and automation opportunities.
- Coordinated sales, technical, and support teams while developing education-sector go-to-market strategies.

Associate Unit Manager

Pru Life UK | Jul 2018 - Mar 2026

- Trained financial consultants in sales and client servicing; advised 100+ clients on insurance and investment plans.
- Built structured follow-up and servicing systems to support client retention and referrals.

Project Manager

Generali Life Assurance Philippines Inc. | Sep - Nov 2022

- Coordinated delivery against client requirements, tracked progress, managed stakeholders, and resolved escalations.

Account Manager / Developer

Semicolon Connects | 2019 - 2022

- Built websites and landing pages with lead capture, tracking, and conversion flows; translated client needs into technical solutions.

Front-End Developer

Hælttech Philippines Inc. | 2018 - 2019

- Developed responsive insurance web applications with cross-browser and device compatibility.

Website Developer

Filweb Asia Inc. | 2016 - 2018

- Built and optimized e-commerce websites for usability, performance, and responsive design.

Junior Software Developer

Software Algo Solutions, LLC | 2015 - 2016

- Built and maintained applications, debugged issues, and supported deployment and releases.