

LITO M. ABRENICA

CRM & AI Automation Specialist | Virtual Assistant

Philippines | Flexible Availability

PROFESSIONAL SUMMARY

Detail-oriented Virtual Assistant with experience in data entry, document verification, records management, reporting, and administrative support, plus developing expertise in Customer Relationship Management (CRM) setup, lead management, and Artificial Intelligence (AI)-powered business automation.

Supports lead organization, customer information management, automated follow-ups, faster inquiry response, and accurate recordkeeping using GoHighLevel, CRM systems, Google Sheets, and Microsoft Excel.

Comfortable following established processes, handling confidential information, conducting online research, and completing repetitive tasks with accuracy and consistency.

CORE COMPETENCIES

- **CRM & AI Automation:** GoHighLevel CRM setup and organization; lead capture and management; pipeline setup; automated follow-up workflows; appointment booking automation
 - **Conversational & Retention Automation:** AI-powered FAQ and inquiry responses; lead routing and team handoff; review request and customer retention workflows
 - **CRM Operations:** CRM data entry and organization; workflow testing; basic troubleshooting
 - **Administrative Support:** data entry and validation; online research; document verification; records management
 - **Reporting & Quality:** Microsoft Excel; Google Sheets; data accuracy and quality checking; reports and documentation
 - **Client & Information Support:** administrative support; confidential information handling; customer follow-up
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PROFESSIONAL EXPERIENCE

Account Officer | CARD Bank Inc. – A Microfinance-Oriented Rural Bank

October 2018 – August 2020

- Processed and verified loan applications and supporting documents.

- Conducted client interviews and field visits to gather and validate information.
 - Performed document verification, prepared and maintained Know Your Customer (KYC) documentation, and maintained accurate client records.
 - Calculated loan amounts, interest, and payment schedules accurately.
 - Monitored client payments and updated records.
 - Performed data entry and maintained organized client information.
 - Prepared reports and documentation using Microsoft Excel and other office tools.
 - Followed up with clients regarding applications, payments, and required documents while handling confidential client and financial information.
 - Used banking and loan management systems for recordkeeping and transactions.
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PROJECT EXPERIENCE

CRM & AI Automation Specialist — Demonstration Project

GoHighLevel / CRM Automation

Created a demonstration CRM automation system designed for a small agricultural business.

- Lead capture and CRM organization
- Sales pipeline setup
- Automated lead follow-ups
- Appointment and booking workflow
- AI-powered FAQ and inquiry responses
- Lead routing and team handoff
- Review request and customer retention workflows

3G's Foliar Philippines — System Demo Walkthrough

Demonstration project — not client work.

TECHNICAL SKILLS

GoHighLevel | CRM Systems | Microsoft Excel | Google Sheets | Google Workspace | Canva | CapCut | Basic short-form video editing | ChatGPT | AI Tools | Online Research Tools

EDUCATION

Bachelor's Degree | Partido State University | Graduated 2012

ENGLISH PROFICIENCY

Understands most simple English work instructions, communicates with clients in English while occasionally needing clarification, and writes simple, professional emails.

ADDITIONAL STRENGTHS

Detail-oriented | Accurate | Organized | Reliable | Fast Learner | Process-Driven | Flexible | Willing to Learn