

Travis McGimsey

Skills

- CRM Administration
- Critical Thinking
- Information Management
- Cross Functional Leadership
- Strong Microsoft Knowledge
- Workflow Automation
- Effective Communication
- Marketing Technology
- Process Optimization

Summary

Sales and revenue operations professional with over 6 years of experience building scalable CRM and marketing systems that drive growth and operational efficiency. Expert in bridging the gap executive strategy and technical execution, with a background spanning solar energy, automotive finance, and independent consulting.

Work Experience

Independent Consultant

August 2024 - Present

- Provide CRM and sales operations consulting, assessing pipeline structure, lead routing logic, and follow up sequence design for small business clients
- Built a multi-step Power Automate workflow to automate employee onboarding from SharePoint trigger through Entra ID account creation, permission assignment, and welcome email delivery, eliminating all manual steps after the initial trigger
- Earned Google AI Professional Certificate, Google IT Support Professional Certificate, and CompTIA A+

IT Systems Specialist and Funding Manager | Lending Arts

January 2021 - December 2023

- Operations and systems resource for a 25 person team with no dedicated IT department, owning workflow automation, operational support, and process documentation across all departments
- Designed and built 35+ Power Automate flows to automate reporting, approval routing, real time Teams notifications, and cross departmental data management, ultimately reducing sales and funding delays by approximately 12%
- Redesigned the funding intake process using Microsoft Forms and Power Automate to automatically route submitted data to SharePoint, eliminating manual data entry and reducing errors at the point of submission
- Collaborated with executive leadership (CEO, COO, CTO) on system rollouts, KPI reporting infrastructure, and long-term technology planning across all departments
- Manage and train Loan Consultants on system process, financial documentation, sales strategies, and communication tactics with customers

Marketing and Operations Direction | GCC

June 2019 - January 2021

- Built the full CRM environment and Pipedrive from scratch, including customer pipelines, lead routing rules, automated follow up sequences, Twilio SMS integration, and data integrity controls for a distributed multi-state sales team
- Built lead routing automations via Zapier connecting all ad platforms, landing pages, and lead capture tools to the CRM, ensuring every inbound lead was captured, tagged, and routed correctly without manual intervention
- Rebuilt the company's digital presence and launched targeted campaigns across Google, YouTube, and Facebook, increasing monthly lead volume 57% over prior neighborhood canvassing methods

Certifications

Google AI Professional Certificate | April 2026

Google IT Support Professional Certificate | January 2026

CompTIA A+ | September 2024

Education

High School Diploma | Penn Foster | 2013