

Juan Fernandez

GoHighLevel Funnel Builder | CRM and Marketing Automation Specialist

Metro Manila, Philippines | +63 905 489 1486 | hello@planwithjuan.com | [linkedin.com/in/waneff](https://www.linkedin.com/in/waneff)

PROFESSIONAL SUMMARY

GoHighLevel builder with two years of hands-on funnel, workflow and pipeline experience, supported by nine years in consultative sales and four years in software quality assurance. Build and maintain the complete GoHighLevel stack behind a live advisory practice serving 200-plus clients: landing pages, quiz-based lead capture funnels, automated email and SMS follow-up, appointment calendars and multi-stage lead pipelines. Test every form, workflow trigger and tracking path before launch, a discipline carried over from four years of manual QA on enterprise Oracle systems. Available for part-time, project-based or full-time remote work.

Live funnel built and still running: planwithjuan.com/parenting-journey (quiz, automated follow-up, live pipeline)

CORE SKILLS

GoHighLevel: Funnel and landing page building, workflow automation, pipeline and opportunity management, calendar and appointment booking, email and SMS campaigns, forms and surveys, quiz funnels, trigger links, custom fields and values, tags and segmentation, snapshots, sub-account setup, whitelabel and agency configuration

CRM and Marketing Operations: Lead capture, lead qualification and scoring, nurture sequence design, appointment reminders and confirmations, no-show recovery, database reactivation and recall campaigns, missed-call text back, CRM data hygiene, campaign and pipeline reporting

Sales and Client Support: Consultative selling, discovery calls, appointment setting, client onboarding, aftersales and retention, team training and coaching, bilingual English and Filipino communication

Quality Assurance: Test case design, workflow and automation testing, negative and edge case testing, UAT support, defect tracking, Oracle SQL

Tools: GoHighLevel, Oracle SQL, Google Workspace, Microsoft Office, Zoom, Canva

PROFESSIONAL EXPERIENCE

Financial Planner | FWD Insurance

September 2023 to Present | Metro Manila, Philippines

- Build and maintain every GoHighLevel asset the practice runs on: landing pages, quiz-based lead capture funnels, automated email and SMS follow-up sequences, appointment calendars and multi-stage lead pipelines.
- Designed a quiz funnel that segments incoming inquiries by situation and routes each segment into a different automated nurture track, replacing manual follow-up that previously depended on memory.
- Configured pipeline stages, tags, custom fields and trigger conditions so every lead has a visible owner and next action.
- Test all forms, workflow triggers, message delivery and tracking paths before launch, including duplicate submissions, after-hours inquiries, opt-out handling, rescheduled bookings and failed sends.
- Lead a team of financial planners: product training, sales process coaching, and the onboarding modules used for new planners.
- Manage a client book of 200-plus through policy servicing, scheduled check-ins and structured aftersales that generates referrals.

Unit Manager | Pru Life UK (self-employed)

January 2021 to August 2023 | Metro Manila, Philippines

- Owned sales operations and recruitment advertising for an advisory unit: sourcing, pitching and onboarding new consultants.
- Ran a full-cycle recruitment and client acquisition funnel from advertisement through to onboarding, the same structure later rebuilt in GoHighLevel.
- Coached new consultants through their first client conversations and closes.

Assistant Unit Manager, promoted from Financial Planning Consultant | Pru Life UK

August 2017 to December 2020 | Metro Manila, Philippines

Part-time and concurrent with the Software Quality Engineer role below until August 2018.

- Grew from part-time consultant to assistant unit manager by winning and retaining individual and family clients on protection and investment planning.
- Ran consultative discovery conversations, diagnosing client needs before recommending a solution.

Software Quality Engineer | CheQ Systems, Inc.

May 2014 to August 2018 | Metro Manila, Philippines

- Performed manual and backend quality assurance on Oracle database systems supporting a telecom client's IT billing platform.
- Designed and executed test cases, logged and tracked defects to closure, and supported UAT cycles ahead of each release.

EDUCATION

Technological University of the Philippines

BS Computer Science, IT Project Management | 2010 to 2014

LICENSES AND CERTIFICATIONS

Licensed Insurance Agent (Accident, Health, Life and Variable Life), Philippine Insurance Commission, 2017