Tobey Tobias

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Business systems consultant with 10+ years of experience across operations, automation, AI, analytics, and project delivery. Built and run the backend, from CRMs and automations to AI tools, for businesses in compliance, e-commerce, SaaS, financial services, and logistics.

WORK EXPERIENCE

Business Systems Consultant | Automation, AI & Project Execution **2022 – Present**

- **AI Systems & Build**: Ship developer-level builds, websites, scripts, custom integrations, internal tools, and MVPs, using AI-assisted development instead of traditional coding, delivering in days instead of weeks. Built an internal AI operating system the team runs daily that acts as both assistant and coach, lifting productivity and efficiency while helping the team adopt and implement new systems. Builds include an AI sales-development system that handles inbound end to end (classify, route, draft, book).
  Stack: Claude; ChatGPT; Gemini; n8n; API integrations

- **Project & Operations Management**: Led 10+ technology implementations including CRM migrations, compliance automation builds, and workflow redesigns for SaaS, e-commerce, and retail clients, while authoring 25+ process runbooks, training cross-functional teams of 5–10 users and delivering projects that reduced operational overhead by 20–40% within 90 days.
  Stack: Monday.com; Notion; Asana; ClickUp

- **Workflow Automation & Systems Integration:** Built 50+ automations that improved operations and marketing for field teams, account managers, and operations staff across compliance, field services, and e-commerce, and automated lead capture, nurturing, scheduling, job tracking, reporting pipelines, and cross-department handoffs, removing 30+ hours per week of manual coordination. Used AI-assisted development to create custom integrations, internal tools, and MVPs without traditional coding, delivering functional prototypes in days instead of weeks.
  Stack: Zapier; Airtable; GoHighLevel; ChatGPT; Claude; Gemini

- **Systems and Technical Support:** Served as the primary technical resource for 5–30 person teams, resolving integration issues and configuring CRMs, booking platforms, AI tools, and communication systems to support daily operations. Reduced downtime by 30% through systematic documentation and proactive platform optimization, and evaluated and onboarded new tools based on business needs to ensure teams could adopt technology efficiently without dedicated IT support.
  Stack: Google Workspace; HubSpot; Zoho; Salesforce

- **Data & Reporting Systems**: Built 15+ Power BI and Tableau dashboards that consolidated data from 5–8 systems, including CRMs, project management platforms, and accounting tools, serving teams of 20–50 users. Developed automated ETL workflows that eliminated 10+ hours of weekly manual reporting and enabled real-time data visibility, giving executives and operations leaders immediate insights into sales performance, project health, inventory status, and key operational metrics.
  Stack: Power BI; Tableau; SQL; Google Sheets; Excel

Assistant Project Manager – Appen Services **Jun. 2021 – Jun. 2022**

- Created report dashboards using Power BI and Power Query to track project performance and team productivity.

Sales Compensation Analyst – Service Source **Sep. 2020 – Jun. 2021**

- Processed sales compensation for global employees, managed reconciliation reports, and communicated with managers and executives regarding incomplete data.

Workforce Management Team Lead – Sykes Asia **Oct. 2016 – Sep. 2020**

- 2018–2020: Supervised a team of Real-Time Analysts, Report Analysts, and Schedulers, aligning WFM strategies with business goals and delivering timely reporting to Account Directors.