

Lisa René

BUSINESS SOLUTIONS • TECHNOLOGY • CRM • AUTOMATION
WEBSITES • OPERATIONS • DESIGN

South Florida | solutions.lisarene.love | LinkedIn



PROFESSIONAL PROFILE

Business solutions and technology consultant with more than 20 years of experience helping organizations improve operations, systems, technology, communications, and business processes. Expertise spans CRM and Salesforce, workflow automation, websites and digital systems, operations, project management, marketing technology, graphic design, data management, reporting, documentation, training, and user adoption.

Special strength: seeing how the pieces of a business connect and translating complex needs into practical, sustainable solutions across technology, operations, marketing, and design.

CORE EXPERTISE

- CRM & Salesforce Solutions
- Website & Digital Systems
- Operations & Organizational Systems
- Marketing Technology & Communications
- Project & Vendor Management
- Technology Assessment & Implementation
- Workflow & Process Automation
- Business Process Analysis
- Data Management, Reports & Dashboards
- Graphic Design & Brand Support
- HR & Employee Onboarding Systems
- Documentation, Training & User Adoption

CURRENT LEADERSHIP & CONSULTING EXPERIENCE

Lisa René Solutions

Founder & Business Solutions Consultant | July 2022 - Present

- Provide strategic, technical, operational, and creative solutions to small businesses and nonprofit organizations across multiple industries.
- Engagements include CRM and Salesforce development, automation, operations, websites, marketing technology, data management, design, and specialized systems projects.

CAPE Universal Director of Operations	Ecstatic Living Florida / The Womb Marketing Director
Provide operational leadership for a nonprofit arts and youth-development organization, supporting programs, contracts, funder requirements, invoicing, systems, communications, documentation, website management, and day-to-day operations.	Lead marketing and digital communications for The Womb, including brand strategy, website and event promotion, content, social media, graphic design, email communications, and supporting digital systems.

Selected Consulting Work

- **CRM & Salesforce:** administration, architecture, process analysis, data management, reports, dashboards, automation, documentation, and optimization.
- **Business Systems & Automation:** CRM pipelines, workflows, automated communications, lead management, appointment systems, reporting, and operational improvements.
- **Websites & Digital Technology:** design and management across Wix, Wix Studio, GoHighLevel, Duda, forms, CRM integrations, email systems, and supporting technology.

- **Marketing & Communications:** strategy, email campaigns, branded collateral, presentations, reports, brochures, digital content, and graphic design.

Representative Client Sectors

Nonprofit & Community Organizations • Education & Youth Development • Professional Services • Property Management & ADA Compliance • Automotive & Specialty Trades • Legal Education & Notary Services • Health, Wellness & Events • Payments & Financial Services

PROFESSIONAL EXPERIENCE

Navisite | Remote

Project Manager / Salesforce Administrator | October 2019 - July 2022

- Managed multiple Salesforce consulting projects and teams, coordinating client discovery, execution, ticketing, documentation, testing, and deployments.
- Served as project manager, Salesforce administrator, and solution architect across engagements.
- Designed solutions using standard Salesforce functionality and coordinated with developers when custom development was required.
- Led client meetings, translated business processes into system requirements, and managed deployments using Gearset, ClickDeploy, and change sets.

MedPro Staffing | Sunrise, Florida

Sr. Salesforce Administrator • Director of Salesforce Development • Director of Information Technology | March 2013 - September 2019

- Designed and built an integrated finance solution connecting TargetRecruit and Accounting Seed.
- Designed and built a custom HR system for Benefits Enrollment, Professional Development & Training, PTO, Time Entry, Employment Events, and Performance Management.
- Worked directly with leadership to identify business requirements and design technology solutions.
- Configured, tested, documented, deployed, and continuously enhanced Salesforce functionality.
- Created extensive technical, training, and process documentation, including a 90-page system manual.
- Managed vendor relationships, specialized development, IT staff, infrastructure, office relocation, and expansion projects.
- Identified opportunities to streamline operations and eliminate manual processes through technology.

Nonprofits First | Boynton Beach, Florida

Help Desk Manager / Salesforce Administrator / Graphic Design Specialist | September 2006 - November 2012

- Administered and extensively customized Salesforce to support organizational operations and nonprofit service delivery.
- Worked with management to document departmental business processes and configure Salesforce around those processes.
- Conducted staff Salesforce training with an emphasis on user adoption and sustainable internal processes.
- Supported nonprofit clients through technology assessments, outsourced IT services, vendor and contract management, project coordination, and client service.
- Provided graphic design and communications support and trained staff in Adobe Creative Suite.

Earlier Technology & Design Experience

1995 - 2006

Early career experience included graphic design, ACT! database management, computer support, help desk technology, and business systems. This established the technical and creative foundation for later Salesforce administration, systems development, and technology leadership.

TECHNOLOGY & PLATFORMS

CRM & SALESFORCE	BUSINESS & DIGITAL PLATFORMS
Salesforce Custom Objects, Apps, Flow, Formula Fields, Validation Rules, Record Types, Reports, Dashboards, Security, User Management, Lightning, Data Management, Testing, Training & Documentation	GoHighLevel, Wix, Wix Studio, Duda, Google Workspace, Microsoft 365, Canva, Adobe Creative Suite, AI-assisted business and content tools
BUSINESS APPLICATIONS	PROJECT / DEPLOYMENT TOOLS
Accounting Seed, TargetRecruit, DocuSign, TaskRay, DemandTools, Data Loader, Elements.cloud	Gearset, ClickDeploy, Jira, documentation and testing workflows

PROFESSIONAL TRAINING

Salesforce Administrator Training (ADM201)
Orlando, Florida

MCSA Program
Boca Raton, Florida

Salesforce Advanced Administrator Training (ADM301)
Chicago, Illinois

Hardware/Software Support Program
Boca Raton, Florida