

AARON HOLMES

BUSINESS SYSTEMS | INTEGRATIONS | AUTOMATION | TECHNICAL IMPLEMENTATION

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PROFESSIONAL PROFILE

Business systems and technical implementation specialist who connects operational needs to maintainable applications, integrations, and automation. Bridges requirements discovery, hands-on configuration, API troubleshooting, data quality, and user support across healthcare, restaurant SaaS, financial services, and client projects. Brings substantial business-operations leadership and practical product judgment to technical problem solving, vendor relationships, documentation, and adoption.

CORE CAPABILITIES

Business systems & delivery Application ownership · Requirements discovery · Process mapping · Workflow architecture · Solution design · Process improvement · Project/vendor coordination

Data quality & integration CRM data modeling · Field mapping · Normalization · Deduplication · Record validation/reconciliation · Exception handling · Imports/updates

Reliability & support Production troubleshooting · Root-cause analysis · Logs and alerts · Controlled testing · Dependency documentation · Automation cost analysis

Customer & product SaaS onboarding and support · Customer discovery · Product feedback · Usability · Stakeholder communication · Training and technical handoffs

PROFESSIONAL EXPERIENCE

TixWork | SaaS Implementation, Product and Customer Support · Current

- Support onboarding, issue triage, maintenance, and customer communications for TixWork, a restaurant-operations SaaS platform used across 100+ locations.
- Apply restaurant operations expertise during product demos and customer discussions to translate maintenance, staffing, and field workflows into useful product requirements.
- Bring operator feedback into feature and usability discussions, helping connect day-to-day product friction with practical workflows and development priorities.
- Investigate support issues with customers and developers, clarify symptoms and expected behavior, and coordinate follow-up in terms operators can understand.
- Contribute to ongoing product maintenance and evolving customer-acquisition and marketing work while supporting existing accounts.

Lincoln Health Supply | Business Systems Automation Engineer · Sep 2025–Aug 2026 | Remote

- Served as a primary technical resource for 400+ existing Zoho CRM workflows, about 150 existing Deluge functions, and hundreds of Zapier automations across intake, eligibility, prescriptions, documents, messaging, and orders.
- Built a custom multi-endpoint pVerify REST integration in Zapier, using bearer-token request authentication, patient/payer field mappings, response normalization, and CRM record updates; traced request and response failures in production.
- Redesigned centralized duplicate processing and intake rules around normalized identifiers, product/stage grouping, ownership and supplier routing, and a 30-day matching window; reviewed approximately 300 recent records for data-quality problems.
- Investigated request creation across multiple intake routes; traced owner/supplier misrouting to upstream Flow behavior and validated the correction.
- Connected Zoho Survey, Google Sheets, Zoho Flow, CRM, HCPCS/product logic, document generation, and order workflows for compression garments across differing intake processes.
- Repaired deductible update logic through text-to-numeric conversion and timestamped CRM fields; checked data consistency using controlled tests and follow-up validation.
- Developed DOB normalization and discrepancy alerts for Prospect and Patient records; used error notifications and exception review to surface failed or mismatched updates.

- Diagnosed failures across eligibility, intake, prescription records, fax/SMS services, and fulfillment; improved logs and dependencies documentation and trained another employee in support procedures.
- Analyzed high-volume Zapier runs, repeated CRM lookups, and task costs; proposed richer payloads and shared queries to reduce redundancy.
- Supported an existing AI-assisted medical-document keyword-extraction workflow and troubleshooted its connections with fax and medical-record processing.

AviKaiDo | Business Systems and Automation Consultant · Jan 2019–Sept 2025

- Delivered client websites, CRM workflows, data integrations, and operational automations across financial services, healthcare, publishing, and small businesses, from discovery and implementation through support.
- Built securities-backed lending intake and document workflows for High West Capital Partners, Global Stock Lenders, and International Liquidity Partners, using borrower/ticker data, historical market metrics, loan-to-value rules, and generated deal documents.
- Developed prospecting and referral-support workflows for Global Stock Lenders, aggregating public shareholder and company information for outreach research.
- Prototyped Ask Your Primary pharmacy QR intake and CRM/fax-to-record workflows, including patient-data mapping and document association.
- Implemented automated content-ingestion and rules-based classification workflows for TheRedZone and investigated website caching and application-performance problems.

Ascend Internet Marketing | Web Development, CRM and Client Delivery · Nov 2015–Dec 2018

- Delivered web and CRM projects for clients including Schafer Development and Cure Launcher, balancing implementation, troubleshooting, client communication, and ongoing support.
- Contributed to JK&T Wings' custom maintenance-tracking system, an early client solution that later developed into the TixWork SaaS product.
- Clarified business requirements, coordinated developers and vendors, tracked issues and milestones, and guided clients through technical project handoffs.

SELECTED INDEPENDENT WORK AND COMMUNITY INVOLVEMENT

- AI context workspace: architecting a portable, model-agnostic knowledge system with Markdown context routing, project-specific records, and selective retrieval so different AI assistants can reuse consistent context instead of reconstructing prior conversations.
- Offline knowledge migration: designed and tested a local Python/SQLite toolkit for conversation exports, provenance, sensitivity flags, and human review/publishing gates; keeps raw private archives separate from approved knowledge and supports controlled updates.
- FIRST robotics volunteer since 2021, mentoring student design, programming, fabrication, testing, and troubleshooting; supported middle-school FTC Team 8424 in its 2025 Michigan State Championship season.

TECHNOLOGY AND METHODS

Business Applications & Automation: Zoho CRM (custom modules, workflows, data architecture) · Zoho One · Zoho Flow · Zoho Survey · Zapier (multi-step automation, custom API integrations) · WordPress (custom development)

Connected Services & Workflows: pVerify (insurance eligibility APIs) · PandaDoc (document automation) · Phaxio · Telnyx · Sinch (fax/SMS integrations) · Google Sheets (data workflows) · PDF Generation

APIs, Queries & Scripting: REST APIs · Webhooks · JSON · API Authentication (Bearer Tokens) · Zoho COQL · Deluge · JavaScript · API Data Mapping & Validation

Development Tools & Languages: Python · TypeScript · SQL · Node.js · HTML/CSS · Astro · Playwright · BeautifulSoup · SQLite · Git/GitHub · Linux/WSL · VS Code

Cloud & Local AI: AWS Academy Labs (EC2, RDS, VPC, IAM, S3, Secrets Manager) · LM Studio · Local LLM Inference & APIs · Markdown Context Routing · Offline Knowledge Migration