ARIFUR RAHMAN | CRM & MARKETING AUTOMATION CONSULTANT

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CRM & Marketing Automation Consultant

I repair broken CRM and marketing automation systems, rebuild lifecycle logic, stabilize onboarding, fulfillment, and reporting across Keap, HubSpot, GoHighLevel, Ontraport, and WordPress - and I also build reliable systems from scratch when a clean implementation is the better path.

Independent CRM and marketing automation consultant with 12+ years of hands-on implementation work across coaching, education, membership, and service businesses. Focused on CRM cleanup, automation repair, onboarding and fulfillment workflows, reporting visibility, operational handoffs, and stable system ownership across Keap, HubSpot, GoHighLevel, Ontraport, Kajabi, WordPress, and Zapier.

EMAIL

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WEBSITE

arif.win

LINKEDIN

LinkedIn

UPWORK

Upwork

Proof

- 12+ years
- 250+ projects
- 16,280+ hours
- 100% Job Success
- Top Rated Plus

Current featured engagement

WendyDeRosa.com / School of Intuitive Studies

CRM Manager & Automation Administrator (Keap, Kajabi & GoHighLevel)

Dec 2023-Present

WHAT I HELP WITH

What I Help With

- **CRM cleanup and rebuilds:** Repair messy CRM structure, lifecycle stages, segmentation, and ownership when the current setup can no longer be trusted.
- **Automation repair and QA:** Fix broken follow-up, missed triggers, duplicate logic, and fragile automations across live systems.
- **Pipeline logic and reporting:** Make lifecycle reporting easier to trust by cleaning up statuses, handoffs, attribution paths, and dashboard logic.
- **Onboarding and fulfillment workflows:** Stabilize purchase, onboarding, course access, subscription, and customer handoff workflows across connected tools.
- **Integrations and operational cleanup:** Reduce manual work across forms, payments, scheduling, LMS, membership, and CRM connections.
- **Documentation and handover:** Leave client teams with cleaner systems, clearer ownership, and documentation they can actually use.

SERVICES

Services

- **CRM Automation Consulting:** Audit and improve CRM architecture, lifecycle structure, segmentation, and operational ownership. Best fit: Best fit when the CRM has grown messy, unreliable, or unclear. Result: A cleaner CRM foundation that supports follow-up, reporting, and team handoff.
- **Marketing Automation Consulting:** Repair nurture flows, campaign logic, webinar follow-up, launch automation, and day-to-day automation reliability. Best fit: Best fit when follow-up leaks, onboarding fails, or launch automations have become fragile. Result: More dependable automation and less manual cleanup around marketing operations.
- **AI Workflow Automation:** Use AI-assisted workflows where they reduce repetitive operational work around CRM administration, triage, drafting, and support. Best fit: Best fit when the team needs lighter-weight operational leverage without overengineering the stack. Result: Faster internal workflows around the systems that already run the business.
- **Implementation and Optimization:** Build new systems cleanly when patching is not enough, then optimize handoffs, QA, and maintainability. Best fit: Best fit for new implementations, migrations, or major rebuilds. Result: A reliable implementation that can be maintained without constant firefighting.

PLATFORM EXPERTISE

Platform Expertise

CRM / automation

Keap, HubSpot, GoHighLevel, Ontraport, ActiveCampaign, Pipedrive

Web / LMS / membership

WordPress, Memberium, LearnDash, Kajabi, Teachable, CustomerHub, Wishlist Member

Integrations / payments / scheduling

Zapier, Calendly, Stripe, PayPal, Webhooks, Custom APIs

HOW I WORK

How I Work

1. **Diagnose:** Audit the stack, trace the workflow, and identify where follow-up, access, payment, or reporting is breaking.
2. **Blueprint:** Map the desired lifecycle, handoffs, ownership, and system rules before changing live automation.
3. **Build and test:** Implement carefully, QA edge cases, and make sure the new system works under real operating conditions.
4. **Handover:** Document the setup, clarify ownership, and leave the client team with something they can maintain.

Common leaks I fix

- Follow-up goes missing
- Onboarding fails to trigger
- Payment data does not sync
- Reporting cannot be trusted
- Manual work piles up
- No one owns the system

What changes after the fix

- Follow-up becomes consistent
- Pipeline becomes clearer
- Tools work together reliably
- Reporting becomes more trustworthy
- Systems become maintainable by the client team
- Systems can be rebuilt cleanly from scratch when patching is not enough

SELECTED SYSTEMS WORK

Selected Systems Work

WendyDeRosa.com / School of Intuitive Studies systems administration

KEAP | KAJABI | GOHIGHLEVEL | WORDPRESS

An evolving CRM and course-delivery stack needed reliable day-to-day ownership, cleanup, and cross-functional support. Stepped in first to clean up Keap, then expanded into the primary CRM management and systems administration role across lead flow, customer journeys, course operations, subscriptions, and platform maintenance. The business has ongoing CRM ownership, cleaner data handling, and more dependable operational oversight across marketing, operations, and customer support.

Lead nurture rebuild

KEAP | ZAPIER | CALENDLY

Lead capture and nurture logic had become unreliable, and reporting was difficult to trust. Rebuilt nurture paths, cleaned segmentation logic, and restored the reporting structure. Follow-up resumed cleanly and the client had a setup the team could manage with more confidence.

Course launch and onboarding automation

GOHIGHLEVEL | KAJABI | STRIPE

Launch and onboarding automation depended on fragile handoffs between forms, payments, and delivery. Reworked the automation paths and QA across intake, payment, and access steps. The onboarding experience became more dependable for both the team and new customers.

Keap checkout and fulfillment automation

KEAP | STRIPE | PAYPAL

Installment handling, checkout logic, and post-purchase follow-up were creating extra manual cleanup. Implemented clearer purchase, installment, promo, and post-purchase workflows with stronger handoff logic. Purchase operations became easier to run and less dependent on manual intervention.

Built With Science ongoing CRM operations support

ONTRAPORT

A health education brand needed stable segmentation, campaign logic, and reporting across ongoing lifecycle work. Managed CRM operations

Webinar and event campaign operations

ONTRAPORT

Lead magnets, webinar registration, reminders, and follow-up needed to stay coordinated through live launch periods. Built and maintained campaigns for ad leads, PDF offers

SPECIALIZED IMPLEMENTATION PORTFOLIO

Specialized Implementation Portfolio

Checkout, payment plans, and promotions

Build and repair purchase flows that depend on installment logic, promo handling, fulfillment rules, and cleaner post-purchase follow-up. Key work: Keap checkout systems; Payment plans and promotional logic; Stripe and PayPal handoffs.

Purchase automation and access delivery

Connect payment, CRM, LMS, and membership rules so customers receive the right onboarding, access, and follow-up without manual patchwork. Key work: Purchase automation; Course access delivery; Subscription systems and fulfillment.

Webinar and event automation

Support live event workflows where reminder timing, registration quality, follow-up, and launch QA all matter. Key work: Webinar registration; Reminder and follow-up automation; Launch QA.

CRM operations, cleanup, and reporting

Stabilize day-to-day CRM operations through data cleanup, duplicate control, dashboard visibility, imports, exports, and structural maintenance. Key work: Data cleanup and backups; Duplicate merge and CRM hygiene; Reporting and dashboard review.

Membership and course delivery systems

Coordinate CRM, site, LMS, membership, and community workflows so customers move cleanly from purchase to access to support. Key work: Memberium and course access; Kajabi and WordPress course delivery; Wishlist Member support.

Multi-platform CRM administration

Provide ongoing systems ownership across multiple connected platforms instead of treating each tool in isolation. Key work: Keap administration; Kajabi and GoHighLevel administration; WordPress systems support.

WORKFLOW BLUEPRINTS

Workflow Blueprints

Sales and marketing workflow

Maps lead capture, segmentation, nurture, qualification, and reporting so follow-up does not depend on tribal knowledge.

Customer onboarding workflow

Covers payment confirmation, internal notifications, onboarding steps, delivery triggers, and early support handoffs.

Membership automation workflow

Defines how CRM data, access control, subscriptions, and customer status changes stay aligned over time.

Course platform system blueprint

Clarifies how checkout, CRM, course delivery, community access, and support workflows connect across platforms.

CURRENT ENGAGEMENT

Current Engagement

CURRENT FEATURED ENGAGEMENT

DEC 2023-PRESENT

WendyDeRosa.com / School of Intuitive Studies

CRM Manager & Automation Administrator (Keap, Kajabi & GoHighLevel)

Own the day-to-day CRM and platform operations stack across Keap, Kajabi, GoHighLevel, and WordPress for Wendy DeRosa and the School of Intuitive Studies.

- Took over an evolving CRM environment, initially to clean up Keap, then expanded into the company's primary CRM management and systems administration role.
- Fixed broken automation and system gaps across lead capture, follow-up, customer journeys, course access, and ongoing operational workflows.
- Performed CRM data cleanup, imports, exports, backups, and structural maintenance to improve data quality and platform reliability.
- Managed full CRM operations across Keap, Kajabi, and GoHighLevel, including WordPress administration, course delivery, subscription systems, and online community configuration.
- Supported marketing, operations, and customer support workflows as a cross-functional technical lead, helping the team work from a more reliable system.
- Stepped in during a marketing transition to keep Facebook ad lead flow moving into the automation stack and identified gaps in the previous setup that were limiting growth.
- Continue to provide ongoing support, maintenance, operational improvement, and systems oversight as the business evolves.

INDEPENDENT CONSULTING

Independent Consulting

eArif.Com / Independent consulting

INDEPENDENT CRM & MARKETING AUTOMATION CONSULTANT | 2011-PRESENT

Independent consulting across CRM rebuilds, automation repair, membership workflows, implementation, QA, documentation, and operational cleanup.

- Delivered CRM rebuilds, automation repair, integrations, membership workflows, checkout automation, and operational cleanup for international clients.
- Work spans audit, implementation, QA, documentation, and handoff across Keap, Ontraport, WordPress, Zapier, GoHighLevel, HubSpot, Kajabi, LearnDash, and related tools.
- Long-term delivery history includes direct clients, retained support, and Upwork engagements built around stable systems ownership rather than one-off fixes.

SELECTED LONG-TERM ENGAGEMENTS

Selected Long-Term Engagements

- **WendyDeRosa.com / School of Intuitive Studies** | CRM Manager & Automation Administrator | Dec 2023-Present. Current featured engagement across Keap, Kajabi, GoHighLevel, and WordPress.
- **Built With Science** | Ontraport Manager and Administrator | 2020-2023. Ongoing lifecycle automation, segmentation, campaign logic, and reporting support.
- **Pediatric Board Review** | WordPress, Keap, and Wishlist Member Support | 2019-2023. Ongoing support for WordPress, Keap, ecommerce, and enrollment-period operations.
- **Amazon Blue Sky Training Program** | Ontraport Expert and Administrator | 2019-2023. Webinar, lead offer, follow-up, and launch support campaigns.
- **eArif.Com / Independent consulting** | Independent CRM & Marketing Automation Consultant | 2011-Present. Direct client work across CRM rebuilds, automation repair, implementation, and handover.
- **Upwork** | Long-term delivery history | 2011-Present. Top Rated Plus delivery history across CRM, automation, LMS, and operational support work.

EXPERIENCE THEMES

Experience Themes

Current featured engagement

WendyDeRosa.com / School of Intuitive Studies - CRM Manager & Automation Administrator - Dec 2023-Present

CRM rebuilds and lifecycle repair

Keap lead capture and nurture rebuilds; Pipeline logic, segmentation, and reporting cleanup; Automation repair across live client systems

Membership, LMS, and course systems

Kajabi and WordPress course delivery; Wishlist Member support; Subscription systems and online community configuration

Checkout, payment, and fulfillment systems

Keap checkout and fulfillment automation; Installment, promo, and post-purchase logic; Stripe and PayPal connected workflows

Webinar and event automation

Ontraport campaigns for webinar registration and reminders; PDF offer and ad-lead campaigns; Launch QA and follow-up workflows

Ongoing CRM administration and reporting

Built With Science ongoing Ontraport administration; WendyDeRosa.com systems ownership across marketing, operations, and support; Long-term retained support and Upwork delivery history

CLIENT FEEDBACK

Client Feedback

Arifur is a gem. He grew from helping clean up our Keap CRM into becoming our main CRM manager, bridging marketing, operations, and customer support. He is detail-oriented, proactive, strategic, and consistently goes above and beyond for our company.

WENDY DEROSA - JAN 2025

Working with Arif is a joy. I know I can trust him to get the job done.

Thank you for the great work. We truly appreciate it and look forward to working with you again.

CREDENTIALS

Credentials

Upwork standing
Top Rated Plus and 100% Job Success

Delivery history
12+ years, 250+ projects, and 16,280+ hours

Working model
Audit, repair, rebuild, QA, and documentation / handover

Availability
US Eastern Time alignment with dedicated home-office support

SOFTWARE BREADTH

Software Breadth

CRM
Keap, HubSpot, GoHighLevel, Ontraport, ActiveCampaign, Pipedrive

LMS / membership
Kajabi, LearnDash, Memberium, Teachable, CustomerHub, Wishlist Member, WordPress

Payments / checkout
Stripe, PayPal, Keap checkout systems

Scheduling / integrations
Calendly, Zapier, Webhooks, Custom APIs

AI tools
ChatGPT Pro, Gemini Pro, Claude Pro

BUYER CONFIDENCE

Buyer Confidence

- **Can you fix what is already broken?** Yes. A large part of the work is diagnosing unreliable CRM logic, automation gaps, missed triggers, broken handoffs, and reporting issues inside an existing live stack.
- **Can you work with my existing stack?** Yes. The work is usually done inside existing Keap, HubSpot, GoHighLevel, Ontraport, Kajabi, WordPress, membership, checkout, and integration setups rather than forcing unnecessary replacement.
- **Can you build from scratch when needed?** Yes. When the current setup is too brittle to repair cleanly, the approach shifts to a better implementation plan, a cleaner build, and stronger QA before handover.
- **Do you provide documentation and handover?** Yes. Documentation, QA, and handover are part of the delivery model so the client team can keep using the system after the build or repair work is complete.
- **Do you offer ongoing support?** Yes. Several engagements have involved ongoing CRM administration, maintenance, operational improvement, and retained support after the initial repair or implementation work.

CONTACT

Contact

For consulting, retained support, CRM cleanup, automation repair, or full implementation work.

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