

I build the *working layer* between a business and the tools it already owns.

AI systems consultant with 20+ years in enterprise IT. I turn operational requirements into tested workflows, search and answer-engine visibility, borrower and lead interfaces, CRM automation, voice-agent handoffs and client-ready applications.

carlosboyd@gmail.com

[LinkedIn](#)

Kansas City, Missouri



20+

years in enterprise IT

17

pipelines mapped in one live environment

115

GHL workflows audited

3

financial-services builds featured

01 / SELECTED CLIENT WORK

Mortgage and insurance systems with the status stated plainly.

01

MORTGAGE TECHNOLOGY · PRIVATE CLIENT WORK

Talent Home Lending

[Intelligent Borrower Interface](#)

DEMO + ARCHITECTURE

Built the borrower-facing platform demo that the client assessed as 70–75% complete, then mapped a backend-agnostic integration approach for Encompass and ICE Mortgage Technology.

The production integration was deferred while the client evaluated mortgage AI vendors. The work remained at demo and architecture stage; no production or borrower-outcome claims are made.

02

INSURANCE · ACTIVE CLIENT

PEH Financial Services

[Lead Capture, CRM and Ava Voice AI](#)

DELIVERED + ACTIVE

Connected SPWL and Medicare lead generation to mapped GHL fields, follow-up workflows and the Ava voice agent so qualified prospects can move from form submission to a booked conversation.

Work includes the SPWL lead form, nine-stage pipeline, T65 Medicare guide campaign, lead-capture funnel, follow-up logic, state eligibility and client-side voice-agent review and testing.

03

FINANCIAL SERVICES · PRODUCTION SYSTEM

Marathon Financial

[Branded Funnel and Lead-Handling Layer](#)

LIVE

Built the production website, booking path, calculator, compliance foundation and GHL lead-capture layer around an existing Tina voice AI system.

Carlos's scope covered landing pages, GHL verification and integration, forms, A2P 10DLC approval, Meta retarget infrastructure, content assets, Vercel hosting and the schedule-first funnel. Tina's original voice system was delivered before the handoff.

02 / OPERATING PROOF

Working systems, operating evidence and practical teaching.

01

SELECTED PRESENTATION · JULY 30, 2026

GrowthHub365 CHL Walkthrough

Booked to lead a live, nontechnical walkthrough showing content creators how to use Claude with tools already included in their GrowthHub365 GHL account. Framework: Describe, Draft, Design, Deploy, Debrief.

02

LIVE ENVIRONMENT SNAPSHOT · JULY 7, 2026

GHL Operating-System Audit

Audited an active Apex GHL environment containing 115 workflows and 17 pipelines, documented workflow gaps and reduced pipeline clutter to five working boards.

03

COMPLETED · JULY 6, 2026

Native Caller-Name Enrichment

Built a GHL-native workflow that uses Twilio Lookup to enrich unknown callers with caller-name and line-type data without Make.com or a local server.

04

STRATEGY + OPERATING FRAMEWORK

SEO, AEO and GEO Visibility Architecture

Built a search engine optimization, answer engine optimization and generative engine optimization framework covering local intent, quick answers, crawlable pages, schema, citation consistency, Google Business Profile signals, reviews and measurement across Google, ChatGPT, Gemini and Perplexity.

2024–Present · Kansas City, Missouri

Apex Resolution / Carlos Boyd Consulting LLC

- Founder and AI Systems Consultant**
- Builds AI, CRM, voice, lead-capture and follow-up systems for service and financial-services businesses.
 - Turns scattered operational requirements into documented workflows, tested integrations, search-visible content and working client-facing tools.
 - Leads platform audits, SEO/AEO/GEO visibility strategy, compliance implementation, client training and technical delivery across GHL, Vercel, Cloudflare, Meta and Twilio.

July 2022–October 2023 · Overland Park, Kansas

Diabsolut

- Consultant**
- Administered Salesforce systems supporting public-sector contract workflows from intake through closeout.
 - Built automated KPI dashboards and reporting for contract performance and compliance monitoring.

November 2016–December 2019 · Kansas City, Missouri

Federal Reserve Bank of Kansas City

- Technical Specialist**
- Monitored mission-critical systems against performance metrics and service-level requirements.
 - Led technical staff and improved incident, change-management and compliance documentation.

19-year tenure

Sprint

- Enterprise Infrastructure Operations**
- Maintained enterprise infrastructure requiring 99.9% uptime and developed the operating discipline now applied to small-business systems.

CORE CAPABILITIES

- 01 AI workflow and agent design
- 02 SEO / AEO / GEO visibility strategy
- 03 GoHighLevel CRM and automation
- 04 Voice AI integration and testing
- 05 Lead funnels and field mapping
- 06 API and webhook architecture
- 07 A2P 10DLC compliance implementation
- 08 Web applications and client portals
- 09 Technical training for nontechnical teams

EDUCATION

MBA, Baker University

BS, Computer Information Systems, Missouri State University

CREDENTIALS

IAAIC Certified AI Consultant · AI ethics certification · Salesforce Certified Administrator · Google AI Essentials · Google Prompting Essentials

“Prompt, professional and courteous service.”

Pamela Hoggard · PEH Financial Services · Public Google review