Ana Marie E. Escobido

Automation Virtual Assistant · Make.com & AI Workflows · Excel/VBA · Data & Reporting

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Portfolio: portfolio.anaescobido.com

Remote · available for US, Canada and Australia hours (PHT, UTC+8) · Dedicated workspace with backup internet and power

Professional Summary

Automation Virtual Assistant with 11+ years supporting North American clients in retirement, benefits and healthcare insurance operations. Builds Make.com scenarios that connect Gmail, Google Sheets, Docs, Drive, Slack, Tally and AI models (Claude, OpenAI) to automate form intake, email triage, data validation, routing, reporting and notifications, including an appointment-booking workflow that prevents double bookings. Backed by a strong data foundation in Excel/VBA, SQL and Power BI. BS in Information Technology; detail-oriented, well documented and trusted with confidential data.

Technical Skills

- **Automation:** Make.com (multi-step scenarios, webhooks, routers and filters, iterators and aggregators, scheduling, error and fallback handling), Excel VBA / macros; familiar with Power Automate and Power Apps
- **AI in workflows:** Claude and OpenAI for classification, prioritization, routing and draft replies, with structured (JSON) output and a human review step
- **Apps & integrations:** Gmail, Google Sheets, Google Docs, Google Drive, Slack, Tally, Facebook Pages, LinkedIn, Microsoft 365
- **Data & reporting:** SQL, advanced Excel (lookups, pivot tables, formulas), Power BI dashboards, data validation, reconciliation, data cleanup
- **Process & operations:** workflow analysis, process mapping, SOPs and process documentation, requirements gathering, quality assurance, troubleshooting, client and stakeholder communication
- **Industries:** pension and benefits administration, healthcare insurance, transaction processing

Automation Projects

Built and tested in Make.com. Interactive step-by-step demos and real screenshots for each project are in my **portfolio**.

- **AI Email Triage Workflow** · Make, Gmail, Claude, Google Sheets, Slack
  Watches a support inbox, uses Claude to classify each email as urgent, billing or general and draft a reply for review, logs every email in Google Sheets, and alerts Slack when an email is urgent or unclear.
- **Customer Email Classifier** · Make, Gmail, OpenAI, Google Sheets, Slack
  Uses OpenAI to set each customer email's category, priority, sentiment and department, logs it, posts it to the right one of 10 Slack channels and labels it in Gmail, flagging Critical and High priority emails as urgent.
- **Lead Capture & Notification System** · Make, Tally, Google Sheets, Gmail
  Captures Tally form enquiries through a webhook, skips leads already in the sheet, saves new ones, sends an instant thank-you email, and sends the team a lead summary that flags high-budget leads as priority.
- **Weekly Sales Report Automation** · Make, Google Sheets, Google Docs, Gmail
  Runs every Monday: pulls the past week's paid orders, totals revenue, orders and units by product, fills a Google Docs report template and emails it as a PDF.
- **Social Media Scheduler** · Make, Google Sheets, Facebook, LinkedIn
  Publishes posts marked Ready in a Google Sheets content plan to Facebook, LinkedIn or both, and writes the result back to the sheet, including the reason when a post fails.

- **Email Attachment Filing System** · Make, Gmail, Google Drive
  Saves email attachments into a Google Drive folder for each sender, creating folders as needed and renaming files by date so nothing gets lost in the inbox.

Professional Experience

Willis Towers Watson (WTW)

Aug 2019 – Present

Technical Support Senior Specialist, North America Retirement

- Build Excel/VBA automations for data processing, validation and recurring reports, cutting manual effort and rework.
- Review existing workflows for repetitive tasks and bottlenecks, then design and implement automation and standardization fixes.
- Extract and analyze data with SQL and present it in Excel reports and Power BI dashboards for operations teams and clients.
- Turn client requests into clear requirements, processing steps and calculations; troubleshoot issues with clients and cross-functional teams.
- Reconcile data and investigate exceptions to find root causes and prevent repeat errors.
- Deliver time-sensitive annual and ad hoc projects (pension increases, benefit statements, data imports) while handling confidential member data.
- Write process documentation and support knowledge transfer during process transitions.

Accenture

Feb 2015 – Apr 2019

Transaction Processing Analyst, North America Insurance

- Processed high-volume healthcare insurance transactions for North American members and providers, following client business rules.
- Validated member and provider data, corrected missing or inconsistent records and resolved duplicate transactions.
- Ran quality checks before release and analyzed error trends to flag recurring issues and improvement opportunities.

Awards

- **A-List Business Operator Award** for exceeding service levels, timelines and quality targets
- **Pintig Monthly MVP** for consistently strong performance and client support

Education

BS in Information Technology
Father Saturnino Urios University, Butuan City · 2014