Eric Martin

Case Management & Automation Specialist

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SUMMARY

Case Management & Automation Specialist at OCRC, managing client cases from intake through delivery and building the systems that support tax efficiency and asset protection planning. Develops and maintains the Google Sheets financial models and Apps Script automation behind proprietary planning processes—handling depreciation schedules, basis tracking, cash flow projections, and client-specific scenarios requiring absolute accuracy.

Previously owned and operated a Chicago-based design and IT systems consultancy for nearly two decades (2005–2024), serving 1,300+ clients and scaling to six-figure revenue entirely through word-of-mouth referrals. Built secure portals for healthcare firms, custom CRMs for corporate clients, and workflow automation tools for Class A commercial properties—all requiring the same attention to accuracy, compliance, and multi-party coordination applied to financial case management today.

EXPERIENCE

Case Management & Automation Specialist

OH Corporate Resources Consulting (OCRC)
June 2024 – Present • Circleville, Ohio

- Manage client cases from intake through delivery for tax efficiency and asset protection planning, coordinating across advisors, attorneys, and clients to keep complex multi-party work on track
- Built and maintain the Google Sheets financial model and Apps Script infrastructure powering OCRC's proprietary WUA™ process—handling depreciation schedules, basis tracking, cash flow projections, and client-specific scenarios requiring absolute accuracy
- Developed the OCRC Tools menu system to automate repeatable workflows: client file creation, engagement agreements, entity request forms, WUA™ reports, illustration packets, and presentation decks
- Built supporting analysis utilities (price target refresh, capital gains tab generation, distribution optimizer) to give advisors tools without breaking the model
- Wrote comprehensive OCRC Tools User Guide documenting system functions, authorization protocols, and output locations for handoff and training

CEO, Design & Development Lead

Underground Professional LLC
January 2011 – September 2024 • Chicago, Illinois

- Owned and operated a design and IT systems consultancy serving 1,300+ clients across 19 years, scaled entirely through word-of-mouth referrals with zero advertising
- Built custom web applications, secure client portals, and workflow automation tools for clients ranging from nonprofit theaters to commercial real estate firms and healthcare consultancies

- Developed a secure physician portal for Specialdocs Consultants with HIPAA-level data privacy controls, including login authentication, encrypted data storage, and private Q&A; forum
- Created a three-system custom CRM for Grossman & Jack Talent (professional talent agency), enabling independent management across TV/film, theater, and commercial divisions
- Coordinated signage, tenant programs, and digital systems for Class A office properties including 111 S. Wacker Drive, managing multi-party coordination with property managers, vendors, and JLL
- Technical work included API integrations (payment processing, booking systems, ticketing platforms), custom database design (PHP/MySQL), and role-based content management systems
- Served as Brand Manager (volunteer) for Bailiwick Chicago Theater, handling compliance, city arts advocacy, and community organizing for diversity-focused programming

Owner / Lead Designer

Eric M Chicago Modern Design Solutions

2005 – June 2011 • Chicago, Illinois

- Sole proprietorship providing graphic design, web development, and technical support to small businesses in Chicago
- Built client base entirely through word-of-mouth referrals while developing fundamentals of client service, project management, and systems thinking
- Rebranded to Underground Professional LLC in 2011 as the business scaled and formalized

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SKILLS

Technical: Google Apps Script, Google Sheets (advanced), Financial Modeling, Process Automation, PHP/MySQL, JavaScript, API Integration, Database Design, CRM Architecture

Professional: Case Management, Multi-Party Coordination, Client Service, Project Management, Systems Documentation, Training & Onboarding, Compliance (HIPAA, financial regulations)

EDUCATION

Columbia College Chicago

B.A., Music Theater Performance • 2003–2006

Sinclair Community College

A.A., Theater Performance • 2001–2003

Wright State University

Computer Science Studies • 1997–2000