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CHIEF CUSTOMER OFFICER

Post-Sale Revenue Transformation | NRR Growth | Forecast Predictability | SaaS & AI Scale

EXECUTIVE SUMMARY

Chief Customer Officer specializing in transforming unpredictable post-sale revenue into governed, forecastable growth engines for high-growth SaaS and AI companies.

Recruited by CEOs and investors to eliminate churn volatility, restore Net Revenue Retention to 120%+, and establish board-grade forecasting through AI-driven customer intelligence, lifecycle governance, and unified operating models across Customer Success, Support, and Professional Services.

Consistent track record of rebuilding fragmented customer organizations into disciplined, metrics-driven systems that increase retention, expand revenue, and improve capital efficiency. Trusted partner to Product, Sales, and Finance, embedding the voice of the customer into roadmap, growth strategy, and valuation outcomes.

REPEATABLE EXECUTIVE IMPACT

- Repeatedly restored NRR from <100% to 120–134%+ by replacing reactive retention with lifecycle governance and expansion systems
 - Established 95%+ forecast accuracy through governed renewal pipelines and revenue intelligence models
 - Eliminated churn volatility using AI-driven risk detection, reducing churn up to 42%
 - Built and scaled unified post-sale operating models across CS, Support, and Services supporting \$500M+ ARR
 - Generated \$30M+ expansion ARR through structured value realization and growth systems
 - Improved capital efficiency by reducing cost-to-serve 20–30% through automation and segmentation
 - Built Professional Services organizations to \$12M+ revenue with 45%+ margins and scalable delivery infrastructure
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CORE COMPETENCIES

Post-Sale Revenue Transformation | Net Revenue Retention NRR Growth | Churn Elimination Strategy | Forecast Predictability & Revenue Governance | Expansion & Customer Growth Systems | Customer Lifecycle Strategy & Value Realization | Customer Profitability & Unit Economics | Customer Success, Support & Professional Services Leadership | Global Team Scaling & Organizational Design | Voice of Customer & Product Alignment | AI-Driven Customer Intelligence | Operational Excellence & Process Discipline | KPI Systems & Board-Level Reporting | Cross-Functional Revenue Alignment

PROFESSIONAL EXPERIENCE

Founder & Fractional Chief Customer Officer

Renewal Rocket | 2018 – Present

Recruited by CEOs and investors to fix underperforming post-sale revenue systems in growth-stage SaaS and AI companies, stabilizing retention, restoring expansion, and building predictable, scalable customer revenue engines. Diagnose churn drivers, forecasting gaps, and operational fragmentation, then implement AI-driven lifecycle systems, renewal governance, and unified operating models across the post-sale org.

- Repeatedly reversed sub-100% NRR caused by reactive retention by implementing lifecycle segmentation and renewal governance, restoring NRR to 120–128%+
- Systematically eliminated churn blind spots by building AI-driven lifecycle intelligence across \$500M+ ARR, enabling 90-day risk detection
- Corrected forecast inaccuracy by unifying Customer Success, Sales, and Finance into governed renewal pipelines, improving accuracy to 95–96%
- Standardized fragmented post-sale execution by integrating CS, Support, and Services into a unified operating model, reducing cost-to-serve 24%
- Increased expansion revenue by aligning engagement to ROI and value realization, driving up to 48% ARR growth
- Reduced operating costs \$1.3M+ through automation, AI-assisted support, and digital engagement
- Converted onboarding and services into revenue streams, generating \$3M+ ARR at ~45% margin
- Built board-level reporting systems linking NRR, GRR, LTV:CAC, and renewals to valuation metrics
- Scaled global customer organizations to 3,000+ employees through standardized operating cadence and governance
- Built and scaled global Customer Success, Support, and Professional Services functions with clear KPIs, operating cadence, and leadership structure
- Embedded Voice of Customer into Product and GTM workflows, improving adoption, retention, and CSAT

Chief Customer Officer

411 Locals | 2020 – 2024

Recruited to turn around a high-churn, fragmented customer organization and restore retention, predictability, and unit economics across a 20,000-customer portfolio.

- Reversed declining retention by redesigning lifecycle and renewal governance, restoring NRR from 78% to 104%+ and GRR to 92%
- Increased expansion revenue through structured growth programs, generating \$12.7M ARR and 100%+ YoY upsell
- Eliminated reactive churn by deploying predictive health scoring, reducing churn and escalations 36%
- Corrected forecast inconsistency by implementing renewal governance systems, improving accuracy to 96%
- Reduced cost-to-retain 17% through lifecycle automation
- Unified Customer Success, Support, Services, and Product into a single operating model, reducing escalations 70%+
- Modernized support operations with AI, improving SLA adherence to 97% and reducing MTTR 42%
- Built VoC system generating \$2.1M advocacy-driven ARR
- Scaled organization from 100 to 320 FTE while improving productivity 21%

- Built end-to-end customer journey across onboarding, adoption, support, and expansion, increasing CLTV and experience consistency
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Vice President, Customer Success

Nintex | 2014 – 2018

Promoted to lead global post-sale transformation during SaaS transition, stabilizing retention and building scalable systems across 30,000 customers.

- Increased NRR by 32 points; generated \$14.8M ARR through lifecycle redesign and expansion strategy
 - Reduced churn from 12% to <5% through predictive risk modeling and renewal governance
 - Built AI-enabled customer intelligence platform integrating telemetry and GTM data
 - Improved forecast accuracy from 79% to 94% through pipeline governance
 - Scaled Customer Success from 12 to 275 FTE globally
 - Built \$12.5M Professional Services organization with 45–47% margins
 - Modernized global support operations, improving SLA adherence to 97%
 - Standardized operations across acquisitions, creating a unified global post-sale model
 - Partnered with Product to translate customer data into roadmap priorities, improving adoption and value realization
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POST-SALE REVENUE ENGINE | SYSTEMS, DATA & AI

Revenue Intelligence Infrastructure - Renewal Pipeline Architecture | Forecasting Models and Accuracy Systems | ARR Waterfall and Cohort Modeling | Revenue Visibility and Attribution Frameworks

Customer Data & Signal Architecture - Customer Data Unification | Behavioral Event Tracking and Product Telemetry | Data Models Enabling Lifecycle Decisioning | Segmentation Logic for Risk and Growth Identification

Predictive & AI Systems - Churn Prediction Models | Expansion Propensity Modeling | Customer Health Scoring Algorithms | AI-Driven Risk Detection and Prioritization | Generative AI for Insight Extraction and Support Automation

Automation & Decisioning Systems - Trigger-Based Playbooks | Automated Customer Workflows | Lifecycle Orchestration Engines | Digital Engagement Systems for Scaled Execution

Delivery & Services Infrastructure - Implementation Frameworks | Resource Planning Models | Utilization and Margin Control Systems | Program Governance and Delivery Assurance

Support Systems Architecture - AI-Assisted Case Routing | Tiered Support Design | SLA Monitoring Systems | Knowledge Automation and Ticket Deflection

Platforms & Data Ecosystem - Salesforce | Snowflake | Gainsight | Zendesk | HubSpot | Tableau | Looker | ChurnZero | Planhat | Vitally

EDUCATION

Business Administration

Beacom School of Business

University of South Dakota

EXECUTIVE PROFILE

Post-Sale Revenue Operator | AI-Enabled | Forecast-Driven | Governance-Oriented | Board-Influencing