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CHIEF CUSTOMER OFFICER | VP CUSTOMER SERVICES & SUCCESS

Builder of Post-Sale Revenue Engines for High-Growth SaaS and AI Companies

Customer Success | Professional Services | Implementation Delivery | Renewals & Expansion | SaaS & Automation Platforms

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EXECUTIVE SUMMARY

Chief Customer Officer with 25+ years leading post-sale revenue organizations across B2B SaaS and AI companies. Responsible for retention, expansion, Professional Services margin, and support cost-to-serve across customer portfolios exceeding $160M. Track record includes NRR up to 124%, GRR ≥95%, $14.8M expansion ARR, and renewal forecast accuracy above 95% while scaling global customer organizations supporting 30,000+ customers across enterprise, SMB and consumer segments.

Builds lifecycle operating systems that convert customer adoption into durable revenue. Implements telemetry-driven health models, automated renewal forecasting, AI-enabled support operations, and services monetization programs that improve retention economics and expansion growth. Executive partner to CEOs and boards delivering customer value realization reporting, retention forecasting, and expansion strategy across growth-stage SaaS companies.

EXECUTIVE PERFORMANCE AND LEADERSHIP SCALE

Revenue & P&L Ownership: Led global post-sale portfolios up to $160M revenue with $175M post-sale P&L accountability, supporting organizations operating in $500M+ ARR environments.

Customer Portfolio Scale: Supported 30,000 customers (486K users) including 62% of Fortune 50, with customer lifetime values ranging from <$10K to $2M+.

Retention and Expansion Economics: Net Revenue Retention up to 134% (+40 points) | Gross Revenue Retention 97%+ | churn reduced 42% | generated $14.8M expansion ARR & $2.1M advocacy-influenced revenue.

Professional Services Performance: Built $12.5M services business delivering 45–47% margins, 82–90% utilization, & 95%+ on-time implementation delivery across 1,000+ deployments annually.

Customer Adoption & Operational Efficiency: Accelerated platform adoption 3× while reducing time-to-value 40%, support MTTR 48%, & cost-to-serve 23–34% through lifecycle automation & segmentation.

Financial Performance & Capital Efficiency: Expanded EBITDA margin +900 bps, increased revenue per employee $185K to $262K (+42%).

Global Leadership Scale: Scaled customer organizations from 12 to 1,200+ employees across Americas, EMEA, & APAC, including hybrid in-house & outsourced delivery models.

CORE COMPETANCIES

Post-Sale P&L Ownership | Net Revenue Retention (NRR) | Gross Revenue Retention (GRR) | Customer Lifecycle Governance | Expansion Revenue Strategy | Renewal Forecasting | Predictive Customer Health Models | Professional Services Monetization | Customer Profitability | Global Customer Operations | Digital Customer Success | Customer Experience Strategy | Voice of Customer Programs | Executive Customer Sponsorship | Strategic Account Management |

Organizational Design & Scaling | Support Operations Leadership | Board & Investor Reporting | Cross-Functional GTM Alignment

PROFESSIONAL EXPERIENCE

Chief Customer Officer / VP Customer Success (Interim Operating Roles)
Renewal Rocket — University Place, WA   Jul 2018 – Present

Operate as an embedded executive leader within SaaS & AI companies during growth, turnaround, or leadership transition periods, running customer success, professional services, onboarding, renewals, & support organizations. Brought in by founders, CEOs, & investors to stabilize or scale customer organizations between permanent executive hires.

Leadership Scope

Functions: Customer Success | Professional Services | Onboarding | Support | Renewals | Customer Operations

Revenue Environment: $500M+ ARR environments across SaaS & AI platforms

Geography: Americas | EMEA | APAC

Key Impact

- Implemented predictive health scoring & renewal forecasting improving renewal forecast accuracy to 95–96% within two quarters across multiple engagements.
- Reduced customer time-to-value up to 40% by standardized onboarding methodology & implementation governance.
- Built & monetized services offerings generating $3M+ annual revenue with 45% margin across onboarding, integration, & consulting packages.
- Introduced customer segmentation & digital success programs increasing CSM coverage ratios 3× while reducing cost-to-serve 20%+.
- Served as executive sponsor for enterprise accounts representing $50M+ ARR, restoring retention to 95%+ GRR through adoption recovery & renewal strategy.
- Implemented lifecycle governance frameworks improving retention outcomes & achieving NRR up to 124% across select engagements.

Select Operating Engagements

VP Customer Success | MyAdvice

- Retention Turnaround: Increased NRR to 99.5% & GRR to 93% through lifecycle redesign & renewal governance.
- Support Operations: Reduced MTTR 48%, escalations 35% via support workflow automation & tiered service models.

CCO | Ally.io (acquired by Microsoft)

- Customer Organization Scaling: Expanded global customer organization 6× during rapid SaaS growth.
- Adoption Acceleration: Reduced time-to-value 18% through structured onboarding & adoption programs.
- Professional Services Expansion: Launched consulting & enablement programs generating new services revenue.

Chief Customer Officer
411 Locals — Las Vegas, NV (Remote)   2020 – 2024

Led global customer organization responsible for onboarding, professional services, customer success, support, & renewals for a 20,000 Services / SaaS platform.

Leadership Scope

Revenue Portfolio: $68M post-sale P&L

Customer Base: 20,000 SMB customers

Organization: 320 employees across five countries

Key Impact

- Increased Net Revenue Retention from 78% to 104% within 12 months via lifecycle redesign & renewal governance.

- Generated $12.7M ARR expansion pipeline through adoption-driven upsell programs & executive business reviews.
- Built professional services organization generating $3M+ annual services revenue with 45% margin.
- Reduced cost-to-retain 17% through segmentation & digital lifecycle engagement programs.
- Improved global support SLA adherence from 82% to 97% while reducing MTTR 42% through operational redesign.
- Launched Voice of Customer programs generating $2.1M advocacy-influenced ARR via reference programs & customer case studies.
- Scaled global post-sale organization from 100 to 320 employees across five countries while maintaining voluntary attrition below 5%.

Vice President, Customer Success
Nintex — Bellevue, WA 2014 – 2018

Workflow & digital process automation platform serving 30,000 customers including 62% of Fortune 50 enterprises. Led global customer organization responsible for onboarding, professional services, customer success, & support.

Leadership Scope
Revenue Portfolio: $160M global post-sale revenue portfolio

Organization: 275 employees across North America, EMEA, & APAC

Delivery Scale: 1,000+ workflow automation implementations annually

Key Impact
- Increased Net Revenue Retention 32 points during the company transition from license model to SaaS subscription.
- Generated $14.8M expansion ARR through executive value realization programs & adoption initiatives.
- Built & scaled $12.5M Professional Services org delivering implementations across ent. & mid-market customers.
- Reduced enterprise churn from 12% to under 5% through predictive health scoring & proactive renewal management.
- Improved global SLA adherence from 82% to 97% via standardized support governance & follow-the-sun operations.
- Delivered 1,000+ workflow automation implementations annually with ≥95% on-time delivery.

TECHNOLOGY

Customer Success & Lifecycle Platforms: Gainsight | ChurnZero | Totango | Planhat

CRM & CS & EX Operations: Salesforce | HubSpot | Zendesk | Intercom | Freshdesk | ServiceNow | Jira

Product Adoption & Customer Intelligence: Pendo | Amplitude | Mixpanel | Gainsight PX

Data, Analytics & Executive Reporting: Snowflake | Tableau | Looker | Power BI | Gong | Clari

Automation & Workflow Systems: Zapier | Nintex | Workato | Segment

AI-Enabled Customer Operations: OpenAI / ChatGPT | Zendesk AI | Intercom AI | AI-driven customer health scoring

Collaboration & Operations: Slack | Notion | Confluence | Asana

Security & Compliance Governance: SOC 2 | ISO 27001 | HIPAA | GDPR | PCI

EDUCATION

Business Administration   Beacom School of Business   University of South Dakota

EXECUTIVE PROFILE

Revenue-Accountable Operator | Lifecycle-Driven | Data-Led | Customer-Focused | Board-Trusted