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## PROOF SNAPSHOT

### Executive Customer & Post-Sale Revenue Leadership

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#### OPERATING PROFILE

Customer organizations should not function as reactive support layers. The strongest post-sale organizations operate as governed revenue systems that improve retention quality, expansion consistency, forecasting confidence, executive visibility, and long-term valuation resilience.

Over the last 25+ years, I have built and led global Customer Success, Support, Professional Services, Renewals, and Customer Operations organizations across SaaS, AI, MarTech, Security, subscription, and usage-based business models. My focus has consistently been the same: Create calmer, more measurable post-sale operating systems.

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#### SELECTED OPERATING OUTCOMES

##### Revenue & Retention

- Increased NRR from **78% to 120%+** within 12 months by rebuilding retention discipline, renewal visibility, and expansion governance.
- Improved or sustained net revenue retention up to **134%** through lifecycle governance, adoption systems, and expansion discipline.
- Improved gross revenue retention to **97%+** through structured success planning, renewal governance, and risk visibility.
- Reduced churn **42%** through predictive risk detection, customer health governance, and lifecycle intervention.
- Managed post-sale revenue portfolios up to **\$250M+ ARR** across SaaS, AI, MarTech, Security, and subscription businesses.
- Owned post-sale P&L responsibility up to **\$312.5M** across Customer Success, Support, Services, Renewals, and Customer Operations.
- Generated **\$14.8M expansion ARR** by connecting adoption, executive value realization, and expansion triggers.

##### Forecasting & Executive Visibility

- Improved renewal forecast accuracy to **98%+** through automated forecasting, governance, and board-grade dashboards.
- Built executive operating cadences across **\$250M+ ARR** portfolios for renewal inspection, risk escalation, and customer revenue quality.
- Implemented customer health frameworks across **30,000 customers** using operational signals rather than sentiment scoring alone.

- Improved visibility into churn, adoption, support risk, implementation drag, expansion readiness, and renewal probability across SMB, mid-market, enterprise, and strategic customer environments.

## Support & Operational Scale

- Reduced cost-to-serve **23-34%** through segmentation, automation, digital engagement, and operating model redesign.
- Reduced MTTR up to **48%** through tiered support models, AI-assisted routing, and operational rigor.
- Scaled global customer environments supporting **30,000 customers**, including **62% of the Fortune 50**.
- Improved ticket deflection **68%** through digital self-service, knowledge automation, and support workflow redesign.
- Built operating frameworks across onboarding, support, success, services, renewals, and customer operations for teams scaling from **12 to 1,200+ FTE**.

## Leadership & Organizational Design

- Scaled global customer organizations from **12 to 1,200+ employees** across Americas, EMEA, APAC, and India.
- Led post-sale operating teams across Customer Success, Support, Professional Services, Renewals, and Customer Operations with accountability for up to **\$312.5M post-sale P&L**.
- Supported **30,000 customers**, including **62% of the Fortune 50**, across SMB, mid-market, enterprise, and strategic segments.
- Reduced founder and executive escalation dependency through governance models tied to renewal inspection, customer health, risk visibility, and operating cadence.
- Partnered directly with CEOs, CROs, COOs, CFOs, and executive teams on retention strategy, forecast confidence, operating discipline, and customer revenue quality.

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## OPERATING PRINCIPLES

**Customer health is not a score** - It is the accumulation of operational signals: usage behavior, support patterns, adoption depth, implementation friction, executive engagement, renewal behavior, and expansion quality.

**Retention is a lagging indicator** - By the time retention declines visibly, the operational signals were usually present months earlier.

**Forecast confidence matters** - Revenue organizations break when renewal predictability becomes subjective.

**Customer organizations should reduce executive chaos** - The right operating model lowers escalation pressure, improves accountability, and creates calmer execution.

**Expansion quality matters more than expansion volume** - Healthy expansion follows value realization, operational adoption, and measurable customer maturity.

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## BEST-FIT ENVIROMENTS

Strongest alignment typically includes:

- Subscription or usage-based revenue models
- Founder or executive escalation overload
- Retention and expansion strategically tied to valuation
- Support scale pressure
- CEO, CRO, COO, or board-level visibility expectations

- Renewal predictability concerns
  - Customer organizations requiring stronger operating discipline
  - Post-sale functions that need clearer ownership, governance, and operating cadence
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## **FUNCTIONAL LEADERSHIP**

- Customer Success
  - Renewals
  - Forecast Governance
  - AI-Enabled Operations
  - Customer Support
  - Customer Operations
  - Customer Intelligence
  - Lifecycle Governance
  - Professional Services
  - Revenue Retention
  - Escalation Management
  - Post-Sale Operating Systems
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## **EXECUTIVE SUMMARY**

The strongest companies do not treat customer organizations as cost centers or reactive support functions. They treat them as operating systems that influence retention quality, expansion consistency, forecast confidence, executive visibility, and enterprise value. That has been the focus of my career: building post-sale revenue systems that make customer risk visible earlier, improve operating discipline, and create calmer execution at scale.