

PATRICK STEVEN FERDIG

University Place, WA | Onsite, Hybrid or Remote | Open to Relocation
+1 253-222-9570 | pat.ferdig@gmail.com | [linkedin.com/in/pat-ferdig/](https://www.linkedin.com/in/pat-ferdig/) | www.patferdig.com

CHIEF CUSTOMER OFFICER | VP CUSTOMER SUCCESS | POST-SALE OPERATING EXECUTIVE

\$250M ARR Operating Leadership | \$312.5M Post-Sale P&L | Retention | Expansion | AI Customer Intelligence | Services | Support

EXECUTIVE SUMMARY

Post-sale operating executive with direct ownership across retention, expansion, renewals, Professional Services, Support, Customer Operations, and Customer Marketing. Built and scaled customer organizations across \$250M ARR environments, driving 125%+ NRR, 97%+ GRR, 95%+ renewal forecast accuracy, 42% churn reduction, 23-34% lower cost-to-serve, and 600 bps EBITDA margin expansion. Known for taking fragmented post-sale functions and turning them into one accountable operating system with clear revenue visibility.

SELECT OPERATING IMPACT

Retention	Expansion	Efficiency	Scale
125%+ NRR 97%+ GRR 42% churn reduction 95%+ forecast accuracy	\$14.8M expansion ARR \$12.5M Services business 48% upsell growth \$2.1M advocacy ARR	23-34% cost-to-serve reduction 48% MTTR reduction 68% ticket deflection 600 bps EBITDA lift	30,000 customers 1.6M users 62% of Fortune 50 teams scaled 12 to 1,200+

OPERATING FOCUS

I connect retention, expansion, support, services, onboarding, customer signal, and cost-to-serve into one post-sale operating system: clear ownership, measurable customer health, weekly renewal inspection, AI-enabled prioritization, services margin control, executive save-room cadence, and board-ready revenue visibility.

CORE COMPENTANCIES

Revenue & Retention: NRR, GRR, renewal forecasting, expansion strategy, churn reduction, revenue governance, revenue recovery

Customer Operations: CS, Support, Professional Services, Implementation, Onboarding, Renewals, Customer Marketing, Partner Success, Managed Services

AI & Data: customer intelligence, predictive health, telemetry, churn prediction, expansion propensity, signal architecture, human-in-the-loop governance

Executive Leadership: post-sale P&L, board reporting, investor readiness, M&A integration, organizational design, global scale, GTM alignment

Economics: cost-to-serve, LTV:CAC, services margin, profitability, capacity planning, EBITDA expansion

PROFESSIONAL EXPERIENCE

Founder & Embedded Operating Chief Customer Officer

Renewal Rocket | University Place, WA | Jul 2018 - Present

Embedded post-sale operator for SaaS, AI, MarTech, Security, and acquisition-readiness mandates across CS, Support, Services, Onboarding, Partner Success, Renewals, and CS Operations.

- Installed operating cadence across CS, Support, Services, Renewals, and Customer Ops; tightened control over churn risk, expansion movement, services margin, backlog, and forecast quality.
- Built digital CS playbooks, in-app education, and adoption journeys that doubled time-to-value, tripled adoption, and sustained 128%+ NRR with 31% YoY expansion growth.

- Deployed predictive renewal logic and behavioral scoring, lifting NRR to 99.5% (+14 pts) and GRR to 93% (+12 pts) within six months.
- Designed AI-enabled telemetry and health scoring across \$250M ARR environments; flagged renewal risk 90 days earlier, reduced churn 18%, and improved forecast accuracy to 96%.
- Unified CS, Support, Onboarding, and Services into one model; reduced cost-to-serve 24%, cut MTTR 48%, lowered cost per ticket 53%, and reduced escalations 35%.
- Monetized onboarding, integration, training, and premium support into \$3M+ annual Services revenue at 45% margin while improving CSAT 29 points.

Selected engagements

- MyAdvice: NRR to 99.5%, GRR to 93%, OpEx down \$1.3M.
- Ally.io/Microsoft: team scaled 6x, NRR to 124%, adoption up 21%
- Nextera: 100% GRR, upsell up 48%, escalations down 57%.
- Microsoft: scaled 2,300 agents across seven contact centers supporting 275% volume growth.

Chief Customer Officer

411 Locals | Las Vegas, NV (Remote) | Oct 2020 – Jul 2024

Owned post-sale P&L across CS, Support, Professional Services, Managed Services, Renewal Operations, Partner Enablement, and Customer Marketing for 20,000 SMB customers.

- Owned \$68M post-sale P&L; restored retention discipline, unit economics, and operating control across a high-volume SMB portfolio.
- Rebuilt lifecycle execution with segmentation, VoC analytics, and automated playbooks, raising NRR from 78% to 104% and GRR to 92% in 12 months.
- Built digital onboarding and adoption programs that drove 118%+ NRR, 100%+ YoY upsell growth, and \$12.7M in CS-led expansion ARR.
- Embedded AI-assisted account research, renewal-risk briefs, support summarization, escalation prep, and lifecycle playbooks into daily post-sale workflows.
- Modernized support with tiered service models and AI-assisted routing; reduced MTTR 42%, increased SLA adherence to 97%, and cut backlog 33%.
- Scaled global post-sale team from 100 to 320 FTE across five countries, held voluntary attrition below 5%, and improved productivity 21%.
- Built a VoC engine with sub-14-day feedback loops, producing 120+ case studies and \$2.1M in advocacy-driven ARR.

Vice President, Customer Success

Nintex | Bellevue, WA | May 2014 – Jul 2018

Owned global post-sale strategy across Customer Success, Professional Services, Support, CS Operations, TAM, and Customer Experience during the license-to-SaaS transition.

- Owned \$160M global post-sale P&L across CS, Support, and Services for 30,000 customers, including 62% of the Fortune 50.
- Led retention and expansion through cloud migration, maintaining 92%+ retention, reaching 125% renewal attainment, and generating \$14.8M+ expansion ARR.
- Increased NRR by 32 points and LTV by 21% through redesigned segmentation, lifecycle plays, health governance, and automated journeys.
- Reduced cost-to-serve 23% by scaling digital engagement, standardizing coverage models, and aligning lifecycle motions to value and revenue potential.

- Built a Success Intelligence Hub integrating telemetry, adoption analytics, CSQL logic, health scoring, and next-best-action triggers across 30,000 accounts.
- Reduced annual churn from 12% to under 5% and improved forecast accuracy from 79% to 94% through renewal plays, risk governance, and executive dashboards.
- Scaled CS from 12 to 275 FTE across NA, EMEA, and APAC, reduced ramp time 40%, and enabled 20x customer coverage without proportional headcount growth.
- Built a \$12.5M+ Services organization, integrated four acquisitions, delivered 1,000+ annual implementations, and sustained 45-47% gross margin.
- Redesigned global Support with follow-the-sun coverage, AI-assisted routing, and structured triage, raising SLA adherence from 82% to 97% and reducing MTTR 38%.

PRIOR ROLES

Vice President, Global Customer Experience | Music Tribe | 2011 - 2014

Vice President, Customer Success | Avalara | 2008 - 2011

Director, Global Service | Loud Technologies | 2003 - 2008

POST-SALE REVENUE ENGINE, SYSTEMS, DATA & AI

Revenue Intelligence: renewal pipeline architecture, forecasting models, ARR waterfalls, cohort modeling, revenue attribution, board dashboards

Customer Signal Architecture: data unification, behavioral events, telemetry, lifecycle models, segmentation, adoption decay, dependency scoring

AI Adoption & Governance: operating model design, human-in-the-loop controls, use-case prioritization, responsible adoption, change management, adoption roadmaps

Predictive Intelligence: churn models, expansion propensity, predictive health, risk detection, renewal decisioning, account prioritization, next-best-action logic

Automation: trigger-based playbooks, lifecycle orchestration, renewal prep, escalation briefs, EBR insight generation

Support & Services AI: case routing, SLA monitoring, knowledge automation, ticket deflection, agent assist, theme analysis

Delivery Infrastructure: implementation frameworks, resource planning, utilization, margin control, delivery assurance, services profitability

Platforms: Salesforce, Snowflake, Gainsight, Zendesk, HubSpot, Tableau, Looker, ChurnZero, Planhat, Vitaly

Compliance & Risk: SOC 2, ISO 27001, HIPAA, GDPR, PCI, risk registers, controls review, BCP/DR

EDUCATION

Business Administration

Beacom School of Business

University of South Dakota

EXECUTIVE PROFILE

Revenue-Accountable Operator | Team Builder | Lifecycle-Driven | Data-Led | AI Adoption Leadership | Customer-Focused | Board-Visible