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CHIEF CUSTOMER OFFICER / VP, CUSTOMER SUCCESS

AI-Driven Post-Sale Revenue Operator | Retention, Expansion & Customer Economics

EXECUTIVE SUMMARY

The strongest companies operate customer organizations as revenue engines that improve retention, expand lifetime value, increase forecast accuracy, and strengthen enterprise value.

Chief Customer Officer and post-sale revenue operator with experience leading Customer Success, Support, Professional Services, Renewals, Partner Success, and Customer Operations across SaaS, AI, MarTech, Security, and subscription businesses. Managed \$500M+ ARR portfolios, \$550M post-sale P&L, and global customer organizations supporting 30,000 customers, including 62% of the Fortune 50.

Built predictive customer intelligence, renewal governance, and AI-assisted operating models that increased NRR to 134%, reduced churn 42%, improved forecast accuracy to 96%, and lowered cost-to-serve 23-34%. Combines board visibility with deep operational execution across forecasting, automation, customer economics, and global delivery.

EXECUTIVE SCORECARD

- Managed \$500M+ ARR portfolios and \$550M post-sale P&L across SaaS, AI, MarTech, and subscription businesses
 - Increased NRR to 134%, maintained GRR above 97%, and generated \$14.8M+ expansion ARR through renewal governance and lifecycle execution
 - Reduced churn 42%, accelerated time-to-value 40%, and lowered cost-to-serve 23-34% through automation and workflow redesign
 - Built Professional Services organizations generating \$12.5M+ revenue at 45-47% margin with utilization up to 90%
 - Increased forecast accuracy to 95-96% while scaling customer operations across North America, EMEA, APAC
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CORE LEADERSHIP AREAS

Post-Sale Revenue Operations | Retention & Expansion | Customer Economics | Forecasting & Revenue Governance | AI-Driven Customer Intelligence | Global Customer Operations

PROFESSIONAL EXPERIENCE

Founder & Chief Customer Officer

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

Provide executive leadership and operational transformation for SaaS, AI, MarTech, Security, and subscription businesses navigating retention instability, acquisition readiness, and operational scale challenges>

- Built predictive telemetry and health scoring systems across \$500M+ ARR portfolios, improving forecast accuracy to 96% and reducing churn 18%
- Built digital onboarding and adoption programs that tripled product adoption and sustained NRR above 128% with 31% YoY expansion growth
- Rebuilt renewal operations for high-risk SaaS environments, increasing NRR to 99.5% and improving GRR by 12 points within six months
- Increased upsell revenue 48% through ROI-driven executive business reviews and commercial expansion programs
- Consolidated Customer Success, Support, Onboarding, and Professional Services into unified operating models, reducing cost-to-serve 24% and lowering escalations 16%
- Reduced operating expense more than \$1.3M annually through AI-assisted routing, automation, and support redesign while decreasing MTTR 48%
- Built onboarding, implementation, and advisory services generating more than \$3M annual Professional Services revenue at 45% margin
- Built board dashboards linking retention, expansion, margin, and LTV:CAC performance to acquisition readiness and valuation discussions
- Scaled global customer organizations from 5 to 3,000 personnel across North America, EMEA, and APAC

Chief Customer Officer

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

Owned customer operations and post-sale economics across Customer Success, Support, Professional Services, Renewals, Partner Enablement, and Customer Marketing for a 20,000-customer SMB platform.

- Operated a \$68M post-sale P&L while restoring retention, profitability, and operational predictability
- Rebuilt the customer lifecycle using segmentation and automated workflows, increasing NRR from 78% to 104% and improving GRR to 92% within 12 months
- Built digital onboarding and customer education programs driving 118%+ NRR, 100%+ YoY upsell growth, and \$12.7M CS-led expansion ARR
- Implemented predictive health scoring models that identified renewal risk 90-180 days earlier while reducing churn and escalations 36%
- Increased forecast accuracy to 96% through automated renewal governance and revenue dashboards
- Reduced revenue leakage 42% and lowered cost-to-retain 17% through lifecycle automation and renewal controls
- Integrated Customer Success, Support, Onboarding, Professional Services, and Partner Success into a unified operating model, reducing escalations more than 70%
- Modernized support operations with AI-assisted routing and tiered delivery, reducing MTTR 42% and improving SLA adherence to 97%

Vice President, Customer Success

Nintex | Bellevue, WA | May 2014 – Jul 2018

Led global Customer Success, Support, Professional Services, TAM, and Customer Operations during a large-scale transition from perpetual licensing to SaaS and subscription revenue.

- Operated a \$160M global post-sale P&L supporting 30,000 customers, including 62% of the Fortune 50
- Led retention and expansion during complex cloud migration initiatives while achieving 125% renewal attainment and generating more than \$14.8M expansion ARR
- Increased NRR 32 points and improved LTV 21% through segmentation, digital adoption, and lifecycle redesign
- Built a customer intelligence hub integrating telemetry, adoption analytics, and AI-assisted health scoring across 30,000 accounts
- Reduced annual churn from 12% to under 5% through predictive renewal management and escalation governance
- Scaled Customer Success from 12 to 275 employees globally while expanding customer coverage 20x without proportional headcount growth
- Built and scaled \$12.5M Professional Services organization delivering more than 1,000 implementations annually with at least 95% on-time delivery
- Increased Professional Services utilization from 62% to 78% while sustaining 45-47% gross margin through delivery controls and resource governance
- Rebuilt global Support operations, improving SLA adherence from 82% to 97% and reducing MTTR 38%
- Increased renewal and expansion forecast accuracy from 79% to 94% through standardized forecasting and board-level reporting

Prior Leadership Experience

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

Vice President, Customer Success | Avalara | 2008 - 2011

Director, Global Service | Loud Technologies | 2003 - 2008

TECHNOLOGY, AI & OPERATING INFRASTRUCTURE

Salesforce | Gainsight | Zendesk | Snowflake | Tableau | Looker | HubSpot | ChurnZero | Planhat | Vitality | Predictive Health Scoring | Renewal Forecasting | ARR Modeling | AI-Assisted Support | Product Telemetry | Customer Segmentation | Workflow Automation | SLA Governance | SOC 2 | ISO 27001 | HIPAA | GDPR | PCI | Risk Governance | BCP/DR

EDUCATION

Business Administration

Beacom School of Business

University of South Dakota

EXECUTIVE PROFILE

Builder + Operator | AI-Driven Revenue Systems Executive | Retention & Expansion Leader | Customer Economics Operator | Board-Visible Post-Sale Executive