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CHIEF CUSTOMER OFFICER | VP CUSTOMER SUCCESS | POST-SALE REVENUE OPERATIONS

\$250M+ ARR | \$312.5M Post-Sale P&L | NRR up to 134% | Revenue Durability | Expansion Discipline | Forecast Confidence

EXECUTIVE SUMMARY

Post-sale revenue operator who helps CEOs turn customer organizations into governed revenue systems that protect ARR, expose retention risk earlier, improve forecast confidence, and reduce executive escalation pressure. Led Customer Success, Customer Operations, Revenue Operations, Support, Services, Renewals, Account Management, and Customer Marketing through scale, turnaround, cloud migration, acquisition readiness, and retention recovery. Managed \$312.5M post-sale P&L across \$250M+ ARR environments; improved or sustained NRR up to 134%, improved GRR to 97%+, reduced churn 42%, and lifted forecast accuracy to 95%+. Builds AI-enabled customer intelligence, renewal governance, and lifecycle operating models that improve retention quality, expansion discipline, cost-to-serve, and executive decision quality.

EXECUTIVE SCORECARD

Revenue Ownership: Owned post-sale P&L responsibility up to \$312.5M across CS, Support, Services, Renewals, and Customer Ops.

ARR Control: Led post-sale revenue portfolios up to \$250M+ ARR across SMB, mid-market, enterprise, strategic accounts, and channels.

Retention Durability: Improved or sustained NRR up to 134%, improved GRR to 97%+, reduced churn 42%, and lifted forecast accuracy to 95%+.

Expansion Discipline: Generated \$14.8M expansion ARR, \$2.1M advocacy-influenced ARR, and 48% upsell growth through adoption, value realization, and executive alignment.

Operating Leverage: Reduced cost-to-serve 23-34%, cut ticket cost 53%, reduced MTTR up to 48%, and expanded EBITDA 600 bps.

Scale and Governance: Led teams serving 30,000 customers, 1.6M users, and 62% of the Fortune 50; scaled organizations from 12 to 1,200+ FTE.

OPERATING EDGE

Builds post-sale revenue systems that give CEOs clearer control over retention risk, forecast confidence, expansion readiness, support friction, services delivery, customer value realization, and cost-to-serve. Translates messy customer data into renewal inspection, executive save rooms, margin governance, AI-enabled customer intelligence, and board-visible action before revenue risk becomes visible in the numbers.

COMMERCIAL OPERATING CAPABILITIES

Revenue Protection & Growth: ARR protection, NRR, GRR, renewal management, retention risk, expansion, installed-base growth, churn reduction, revenue governance

Customer Revenue Operations: Enterprise CS, SMB CS, Account Management, CS Operations, Renewals, Support, Services, Onboarding, Customer Marketing, Partner Success

Stakeholder Influence: executive sponsorship, EBRs, board communication, customer governance, value realization, escalation control

Operating Discipline: segmentation, coverage design, lifecycle governance, forecast cadence, capacity planning, cost-to-serve, services margin, EBITDA, operating leverage

Commercial Leadership: turnaround, scale, acquisition readiness, transformation, cloud migration, global leadership

PROFESSIONAL EXPERIENCE

Embedded Operating Chief Customer Officer

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

Embedded operating CCO brought into companies during scale, turnaround, retention recovery, or acquisition-readiness periods to run post-sale revenue systems, rebuild operating cadence, expose renewal risk, improve expansion discipline, and reduce executive escalation dependency. Accountable for practical execution across CS, Support, Services, Partner Success, Renewal Operations, and CS Operations.

- Ran customer revenue operations across CS, Support, Services, Renewals, and Customer Ops in \$250M+ ARR environments; strengthened backlog control, renewal forecasts, escalation discipline, and cost-to-serve visibility.
- Rebuilt expansion and renewal-risk playbooks across post-sale portfolios; improved or sustained NRR up to 134% through lifecycle governance, adoption systems, and expansion discipline.
- Architected AI-enabled telemetry, lifecycle automation, and health scoring across post-sale revenue systems; flagged renewal risk 90 days earlier and lifted forecast accuracy to 96%.
- Aligned EBRs to ROI, value realization, and installed-base triggers; increased upsell revenue 48% through disciplined expansion management.
- Unified CS, Support, Onboarding, and Professional Services into one revenue engine; reduced cost-to-serve 24% while improving lifecycle accountability.
- Reduced MTTR 48%, lowered ticket cost 53%, and cut annual OpEx \$1.3M+ through coverage redesign, automation, and ownership rules.
- Developed onboarding, integration, training, and premium support offers; produced \$3M+ annual revenue at 45% margin while improving CSAT 29 points.
- Coordinated acquisition-readiness inputs for Ally.io; scaled team 6x, raised NRR to 124%, increased adoption 21%.

Chief Customer Officer

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

Owned global post-sale strategy and operating performance for an AdTech and digital marketing business serving 20,000 SMB customers, with scope across Customer Success, Account Management, Services, Support, CS Operations, TAM, Partner Success, and Customer Experience.

- Managed \$68M post-sale P&L across CS, Support, Professional Services, and Partners; restored retention discipline across 20,000 SMB customers.
- Redesigned lifecycle execution using segmentation, VoC analytics, and automated plays; raised NRR to 104% and GRR to 92% in 12 months.
- Codified digital onboarding, adoption, and in-app education; drove 118%+ NRR, 100%+ YoY upsell growth, and \$12.7M CS-led expansion ARR.
- Owned CEO and board dashboards tying AI health signals to NRR, GRR, churn, expansion pipeline, cost-to-retain, and LTV:CAC.
- Influenced Product, Sales, Finance, and Executive teams to identify profitable, recoverable, and misaligned segments; adjusted coverage models to improve unit economics.
- Modernized global support with tiered models and AI-assisted routing; raised SLA adherence to 97%, reduced MTTR 42%, and cut backlog 33%.
- Managed global coverage, capacity, margin, and performance routines while scaling post-sale from 100 to 320 FTE across five countries.
- Created VoC engine with sub-14-day feedback loops; produced 120+ case studies and \$2.1M advocacy-influenced ARR.

- Managed partner delivery and premium support; accelerated time-to-value 28% and generated \$3M+ high-margin Professional Services revenue.

Vice President, Customer Success

Nintex | Bellevue, WA | May 2014 – Jul 2018

Owned global post-sale strategy across Enterprise CS, Account Management, Services, Support, CS Operations, TAM, and Customer Experience during the shift from license to subscription delivery, protecting revenue while building repeatable expansion and renewal motions.

- Managed \$160M global post-sale P&L across CS, Support, and Professional Services for 30,000 customers, including 62% of the Fortune 50.
- Led cloud migration retention strategy; protected ARR during model transition while reaching 125% renewal attainment and \$14.8M+ expansion ARR.
- Increased NRR 32 points and LTV 21% through 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 revenue potential.
- Reduced annual churn from 12% to under 5% through renewal plays, risk governance, and executive intervention routines.
- Improved forecast accuracy from 79% to 94% with renewal and expansion dashboards, strengthening revenue predictability.
- Scaled Customer Success from 12 to 275 FTE across NA, EMEA, and APAC; reduced ramp time 40% and enabled 20x customer coverage.
- Governed services utilization, pricing, scoping, and margin; raised utilization from 62% to 78% while sustaining 45-47% gross margin.
- Served as Executive Sponsor for top 50 enterprise accounts representing \$50M+ ARR; shaped retention strategy, stakeholder alignment, and expansion planning.

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, forecast governance, ARR waterfalls, cohort modeling, attribution, board reporting

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

AI-Enabled Operations: predictive health scoring, renewal risk detection, support routing, knowledge automation, human-in-the-loop controls

Support and Services Systems: SLA monitoring, ticket deflection, agent assist, case routing, utilization, margin, delivery governance

Data and BI: Salesforce, Snowflake, Gainsight, Zendesk, HubSpot, Tableau, Looker, ChurnZero, Planhat, Vitality

Risk and Governance: risk registers, controls review, BCP/DR, security-compliance workflows, responsible AI adoption

EDUCATION

Business Administration | Beacom School of Business | University of South Dakota