

EXPERIENCE

Customer Success Agent - Voatz, Boston, MA

(April 2020 - Present)

- Temporary Customer Success Agent helping support mobile voting application on a contract basis.
- Guiding end users through the voting process over the phone, email and ZenDesk support tickets.
- Beta testing the Voatz end user app and the Voatz Event Manager app through TestFlight.

Customer Success Manager - LinkSquares, Boston, MA

(May 2019 - September 2019)

- The primary point of contact throughout the customer lifecycle, developing relationships with key stakeholders and maintaining a focus on driving business value from on-boarding through renewal.
- Engaged clients via strategy calls and emails, securing buy-in for growth and resolving inquiries by aligning clients with the appropriate internal and external resources.
- Proactively identified expansion opportunities and introduced new products and features that enabled clients to achieve their goals.
- Project managed the onboarding and implementation process for new clients.
- Led client training sessions as part of onboarding and ongoing product adoption.
- Worked with the product team to discuss client feedback and feature requests to drive product enhancements.
- Managed 65+ accounts amounting to roughly \$1M ARR.
- Utilized CRM to keep track of key account data, opportunities, logging calls and relevant notes.
- Handled all support tickets for my assigned clients and contributed to our knowledge base.
- Tools: Salesforce CRM, Zoom Meetings, Gong, Outreach, Trello, ZenDesk, Google Suite, Dashlane.

Client Success & Performance Analysis - State Street Corporation, Boston, MA

Senior Associate (June 2016 - April 2019)

Associate 2 (September 2015 - June 2016)

- Managed book of assigned clients as main contact for all State Street Investment Analytics related inquiries.
- Strategic partner for client executives working to align our products with their goals and vision.
- Led client demos and training sessions for our cloud-based reporting platform and query tools through WebEx.
- Monitored client deliverables and maintained documentation of scope of service, contacts and deadlines.
- Completed change management for new fund, report updates, custom benchmark setup, fund closings.
- Led weekly and monthly strategic calls to discuss current projects and changing industry standards.
- Audited preliminary data and partnered with accounting to resolve discrepancies.
- Collaborated with IT and support teams to troubleshoot platform and reporting issues.
- Provided client feedback to product team to drive product enhancements.
- Designed and configured performance reporting templates based on client specifications.
- Tools: MS Outlook, Excel, Powerpoint, WebEx, Salesforce.

Operations Specialist - State Street Corporation, Boston, MA

Associate 1 (August 2014 – September 2015)

EDUCATION

Bachelor of Arts, International Business (May 2014)

Saint Anselm College, Manchester NH

Honors: Presidential Scholar; Dean's List

Coursera:

- Digital Product Management: Modern Fundamentals (University of Virginia) - (January 2020)

Udemy:

- Customer Success Manager 101: Foundations to Your CSM Career - (December 2019)
- Customer Success: How to Exceed Your Customers' Expectations - (December 2019)

Drift

- Conversational Marketing Certified (April 2020)
- Conversational Sales Certified (April 2020)

HubSpot

- Inbound Certified (March 2020)
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