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Portfolio: 3593-Steve/Portfolio

Enterprise Customer Success & Renewal Framework

1. Renewal Strategy & Revenue Protection

Stephen's renewal framework centers on proactive engagement, value alignment, and predictable execution. He manages renewal portfolios up to **\$26M** and consistently delivers industry-leading outcomes, including **100% renewal rates** in multiple fiscal years. His approach includes:

- Early renewal forecasting and risk scoring
- Executive alignment on business objectives and value realization
- Structured renewal playbooks and cross-functional coordination with Sales
- Data-driven insights from Pendo, Gainsight, and platform telemetry

2. Identifying & Rescuing At-Risk Accounts

Stephen is known for stabilizing distressed portfolios and rescuing high-risk customers. His method includes:

- Rapid root-cause analysis across product, process, and organizational factors
- Executive-level intervention and escalation of ownership
- Rebuilding trust through transparent communication and structured recovery plans
- Demonstrated success: **14 at-risk customers retained**, generating **\$2.5M in renewal revenue**

3. Customer Health Score Methodology

His health model blends quantitative and qualitative indicators:

- Product usage depth and breadth
- Adoption of high-value features tied to business outcomes
- Support trends, open escalations, and SLA adherence

- Executive engagement strength
- Sentiment signals from QBRs, surveys, and stakeholder interviews
He operationalizes these insights through automated alerts, playbooks, and one-to-many programs.

4. Escalation Management Model

Stephen has repeatedly served as the primary escalation lead for enterprise SaaS customers. His model includes:

- Clear triage and prioritization framework
- Cross-functional war-room coordination with Product, Support, and Engineering
- Executive-level communication cadence
- Post-escalation retrospectives to prevent recurrence
This approach has consistently improved CSAT and reduced churn risk across HCM and ERP portfolios.

5. Adoption Acceleration Strategy

Stephen drives adoption by aligning product capabilities with customer business objectives. His strategy includes:

- Feature utilization mapping
- Workflow optimization and best-practice guidance
- One-to-many enablement programs
- Proactive insights from Pendo and Gainsight to identify adoption gaps
His work has repeatedly increased long-term value realization and strengthened customer stickiness.

6. Partnership with Sales for Expansion

Stephen partners closely with Sales to drive expansion and revenue predictability:

- Joint account planning and opportunity identification
- Reference management and customer advocacy development
- Alignment on pipeline visibility and renewal-expansion interplay

- Executive storytelling that ties usage to ROI and future-state vision
This collaboration has supported consistent uplift and expansion across his portfolios.