

Customer Success Leadership Portfolio — Steve Alter

About Me

A Customer Success leader with over a decade of experience managing multimillion-dollar enterprise portfolios, building scalable CS frameworks, and leading high-performing teams. I specialize in transforming customer goals into measurable business outcomes through strategic engagement, data-driven decision-making, and empathetic leadership. Known for maintaining zero churn, driving adoption, and strengthening cross-functional alignment across sales, product, and support.

Signature Achievements

Zero Churn Across Enterprise Portfolio

- Managed a multimillion-dollar enterprise book of business with **0% churn** for multiple consecutive years.
- Strengthened executive relationships and aligned customer outcomes with product strategy.
- Built proactive risk-mitigation processes that reduced escalations and improved CSAT.

Scaled Customer Success Frameworks

- Designed and implemented onboarding, adoption, and retention playbooks used across teams.
- Reduced time-to-value by creating a structured onboarding program and customer journey map.
- Developed a health-scoring model that improved visibility into customer risk and expansion opportunities.

Leadership of High-Performing Teams

- Led a team of 20 CSMs through organizational restructuring while maintaining top CSAT scores.
- Mentored new hires, built coaching frameworks, and improved team performance through structured KPIs.

- Partnered with sales and products to drive strategic account growth and customer advocacy.

Cross-Functional Impact

- Collaborated with product teams to translate customer feedback into roadmap priorities.
 - Created executive-ready narratives that helped sales teams' close deals faster.
 - Built VOC programs that turned insights into actionable improvements.
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Portfolio Work Samples

(All samples are scrubbed of proprietary data and focus on structure, thinking, and outcomes.)

1. Customer Journey Map

- Full lifecycle from onboarding → adoption → maturity → renewal.
- Includes touchpoints, success metrics, and risk indicators.

Illustrates my approach to fostering consistency across multiple teams.

2. Onboarding Framework

- 30/60/90-day onboarding plan.
- Roles and responsibilities for CSM, customer, and cross-functional teams.
- Templates for kickoff decks, success plans, and milestone tracking.

3. Health Score Model

- Weighted scoring across product usage, sentiment, support activity, and business outcomes.
- Automated alerts for risk and expansion signals.
- Resulted in earlier intervention and improved retention.

4. QBR / EBR Template

- Executive-level deck structure showcasing:
 - KPIs

- ROI storytelling
 - Roadmap alignment
 - Strategic recommendations
- Used to elevate conversations with C-suite stakeholders.

5. Scaled CS Playbook

- Segmentation strategy
- Digital touchpoints
- Automated nurture sequences
- Self-service resource hub structure

6. Team Leadership Framework

- Coaching model for CSM development
- KPI dashboard for performance management
- Hiring rubric for evaluating CS talent

Testimonials & Feedback

Customer Feedback

“Steve is the most strategic and proactive partner we’ve had. He consistently anticipates our needs and drives outcomes that matter.”

Manager’s Feedback

“Steve is a stabilizing force. He builds trust quickly, leads with empathy, and consistently delivers measurable results.”

Peer Feedback

“A go-to mentor for new hires. Steve elevates the entire team.”

Tools & Technical Strengths

- Customer Success Platforms: Gainsight, Salesforce

- CRM: Salesforce
 - Analytics: Tableau, Power BI
 - AI & Machine Learning fundamentals
 - API and integration ecosystem fluency
 - Project management methodologies
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Leadership Philosophy

I believe Customer Success is a growth engine. My approach blends strategic partnership, operational excellence, and a deep commitment to customer outcomes. I lead with clarity, empathy, and accountability — empowering teams to deliver consistent, scalable, and measurable impact.

Contact

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