

**Stephen Alter**

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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.