

TRAVIS TAYLOR

Business Operations & Customer Success Professional

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Sales Operations | Account Management | Customer Success | Project Management

Dynamic and strategic Business Operations & Customer Success Manager with over 7+ years of experience in executing high-profile clients across various industries. Proven track record in managing projects with multiple deadlines and budgets exceeding \$5M. Proficient in analyzing complex business requirements and implementing effective solutions.

Skilled In

Account Management | Client Relations | Customer Success | Data Analytics | Market Research | Onboarding & Training | Pipeline Management | Product Demo | Project Management | SaaS Sales Enablement | Sales Operations | Strategic Planning

Technical Skills

Calendly | Canva | Chat GPT Pro | Copy AI | DocuSign | Google AdWords | Google Analytics | Google Business Suite | Google Docs | Google Meets | HubSpot | Magento | Microsoft Office 365 | Monday | MS Teams | Omnichannel | RingCentral | Salesforce | Shopify | Slack | Zendesk | Zoom | ZoomInfo

Professional Experience

Customer Success Manager

Bringg | Remote – Contract | Chicago, IL

Apr 2023 – Jul 2023

- Managed a diverse portfolio of clients across the U.S., ensuring their success, satisfaction, and long-term retention.
- Fostered and cultivate strong client relationships, acting as a trusted advisor and internal advocate, driving value realization, renewal, and expansion opportunities, while effectively mitigating risk and reducing churn.
- Collaborated closely with client teams to develop and execute Joint Success Plans, aligning on long-term objectives, defining milestones, and establishing key performance indicators (KPIs) to drive strategic business outcomes.
- Achieved significant improvement in client satisfaction and loyalty, elevating the Net Promoter Score (NPS) from 5.0 to 8.0 within a swift 2-month timeframe.
- Facilitated cross-functional collaboration with internal teams to optimize customer experiences and proactively address any emerging issues.
- Tracked and analyzed customer data to measure satisfaction levels, identify trends, and drive continuous improvement initiatives.

Customer Success Manager

Visiting Media | Remote | Portland, OR

Apr 2021 – Apr 2023

- Successfully managed a diverse portfolio of over 100 accounts, including both SMB and Corporate clients, with an Annual Recurring Revenue (ARR) exceeding \$2M.
- Led the client onboarding process, ensuring seamless transitions, and evaluating post-sales packages to align with key performance indicators (KPIs).
 - Achieved an average increase in client spend of \$30 per month following onboarding.
- Orchestrated the seamless build-out of final products for each account, overseeing both client and internal levels.
- Provided comprehensive training to teams, equipping them with the necessary knowledge and tools to maximize the value of products and services, resulting in enhanced client return on investments (ROIs).
- Proactively identified opportunities to upsell additional products and services based on client needs, resulting in increased revenue and heightened client satisfaction.
- Leveraged Google Analytics to measure client happiness and product usage, employing a Success Cadence approach to drive continuous product adoption and measurable ROI.
- Contributed to internal initiatives by assisting in the training of new hires and actively improving processes and procedures.
 - Achieved a notable 15% increase in accuracy and efficiency through these efforts.

Sales Operations Manager

Lightspeed Commerce | Hybrid | New York, NY

Jan 2018 – Jan 2021

- Monitored employee productivity, implementing proactive measures to optimize procedures and drive cost reduction.
- Identified inefficiencies within operations and provided valuable recommendations for process improvements.
- Demonstrated effective cost control strategies, resulting in the development and management of operation budgets.
- Proactively analyzed financial data and operational metrics to identify opportunities for cost savings and operational efficiencies.
- Collaborated cross-functionally with teams to streamline operations and enhance productivity, contributing to overall business success.
- Implemented effective cost control measures to align with financial goals and optimize resource allocation.
- Developed and maintained strong relationships with key stakeholders, fostering a collaborative and results-driven work environment.

Business Development Representative

Lightspeed Commerce | New York, NY

Nov 2017 – Jan 2018

- Collaborated closely with Account Executives, providing support, and attending customer meetings as required to ensure seamless communication and alignment throughout the sales process.
- Demonstrated strong selling and influencing skills to effectively set up qualified appointments, driving the sales pipeline and fostering revenue growth.
- Actively participated in sales meetings, vendor training sessions, and local trade shows to stay updated with the latest technology trends and industry developments.
- Utilized proactive outbound prospecting and lead activity management techniques to generate appointments and quotes, effectively qualifying and marketing our solutions to potential customers.
- Leveraged persuasive selling and influencing skills to successfully establish qualified appointments, expanding the sales pipeline and driving business opportunities.

Office Operations Manager

Scout Realty, LLC | Freelance | Brooklyn, NY

May 2016 – Sep 2016

- Provided freelance office operations management services to Scout Realty, LLC, ensuring smooth functioning and optimizing efficiency.
- Offered guidance and support to administrative staff, delivering training and performance evaluations to drive excellence in office operations.
- Collaborated with agents and brokers to streamline transactions, monitor contract timelines, and enhance client experiences.
- Implemented and managed real estate software systems to improve data management and streamline operations.
- Acted as a point of contact for clients, addressing inquiries, resolving issues, and providing exceptional customer service.

Sales Operations Manager

Brooklyn Industries | Brooklyn, NY

May 2015 – Nov 2017

- Conducted comprehensive market analysis, leveraging industry research and customer insights to identify new product opportunities and assess market demand.
- Developed and executed highly effective sales promotions and monthly mailers, resulting in increased customer engagement and substantial sales growth.
- Streamlined internal processes and proactively addressed workflow issues, leading to improved efficiency, reduced costs, and enhanced productivity.
- Monitored and evaluated marketing campaigns, tracking key performance metrics to assess effectiveness and optimize ROI.

Certifications

Technical Analyst Career Fit Achievement | Authorized by IBM | Issued by MyInnerGenius

Mar 2021

Education

University of North Carolina | Bachelor of Arts in Communication Studies | Charlotte, NC

2011-2014