

Robert Wagner

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PROFESSIONAL SUMMARY

I'm a Customer Success Professional with a background in SaaS, Finance and Banking, Sales, and Education. At Universal Tech, I drove growth from 15 to 50+ accounts, and at MVi I generated \$300K+ in customer success revenue in 2023. I look forward to leveraging my experience with my next employer, and driving continued customer success.

PROFESSIONAL EXPERIENCE

T1C – Salt Lake City, UT | Director of Sales and Marketing (*Part-Time - Contractor*)
June 2024 – Present

T1C is a Start-up that provides emotional KPI solutions, unifying teams' collective capacities, engaging individuals, and improving productivity, satisfaction, and tenure.

- Created content for this month's email marketing campaign which resulted in a successful 35% open rate, and 4% conversion as I began processing leads.
- Run customer sales presentations, leveraging technical and marketing documentation, and enhancing customer knowledge of T1C's products and solutions.
- **Tools** | ZOHO CRM, Email Campaign, Snagit, Figma, Microsoft Suite, and ChatGPT AI.

MVi – Salt Lake City, UT | Applications Support Engineer & Technical Writer
Nov 2017 – May 2024

MVi provides SaaS Solutions for Regulated Industries such as Financial Institutions and Municipalities as a Value-Added Reseller (VAR) for Laserfiche

- Secured additional \$300K in customer revenue by leading 30+ IT projects in 2023.
- Provided product education for many of our 200+ customers, driving deeper engagement, and identifying cross sales opportunities, supporting our sales team.
- Developed custom documentation for software deployment, use, and troubleshooting, driving customer success, and product engagement.
- Created 1000's of technical case notes, how-to, and training documents supporting banking SaaS solutions for financial institutions and municipalities.
- **Special Project** | Upgraded MVi's Annual Review Form from a fillable PDF to a user-friendly, dynamic, web form, improving efficiency, collaboration, and engagement for the entire team for years.
- **Tools** | Laserfiche Server, Client, Workflow, Forms, and Import Agent, Microsoft Suite, CRM, SQL Server, SSMS, HTML, XML, CSS, PHP, JS.

Robert Half – Lehi, UT | Recruiting Manager

Mar 2017 – Oct 2017

- Expanded my talent pool by 800% in six months through strategic networking, cold calling, and consistent, balanced follow up with qualified accounting resources.
- Fostered long-term customer relationships by prioritizing objectives and delivering results, sourcing director-level talent in less than 30 days.
- Regularly collaborated with internal teams prioritizing collective success.
- **Tools** | Salesforce CRM, Indeed, LinkedIn, Monster, Microsoft Word, Outlook, Teams, Excel, and Adobe products.

Utah First Credit Union – Midvale, UT | Assistant Branch Manager

Jan 2016 - Feb 2017

- Designed and executed branch-specific marketing campaign, adding local dealership partners, and driving the branch's loan pipeline.
- Reduced branch turnover from 75% to 25% through effective team-building, active listening, and emphasis on making each individual feel valued on the team.

Universal Technical Institute – Rancho Cucamonga, CA | Field Admissions Representative

Feb 2012 – Dec 2015

***Universal Tech.** provides technical career training for Automotive, Diesel, and motorsports industries. My role covered Bakersfield, Palmdale, Arroyo Grande and surrounding areas.*

- Expanded active accounts from 15 to 50+, generating between \$800K-1.2MM/annually.
- Delivered 1000's of career presentations in over 50 High Schools annually.
- Conducted 100's of student / family interviews, identifying qualified future technicians.
- Built strategic business relationships throughout a 350-mile territory where travel, communication, follow up, customer service, and project management were essential for the above successes.
- Ran event planning throughout territory, which drove about 15% of our business.
- **Tools** | Smart CRM, Microsoft Suite, Prezi, and Territory Account Management.

BECU (Boeing Employees Credit Union) – Maple Valley, WA | Member Consultant

Jan 2006 – Feb 2012

- Drove new membership through branch marketing campaigns and content creation.
- Achieved top 10% performance in customer service, enhancing member satisfaction.
- Coordinated financial literacy programs, boosting youth membership applications.

Yellow Book, USA | Account Executive - Advertising

Oct 2004 – Dec 2005

- Generated \$200K+ in annual revenue through cold calling, follow up, and consulting with SMBs on their brand, services, and Yellow Pages/Online marketing campaigns.
- Designed and built a full-page ad for an Insurance firm, achieving a 50% improvement in qualified call conversions.

EDUCATION & QUALIFICATIONS

Bachelor of Science in Web Design & Development

BYU – Rexburg, Idaho

Certification in Snagit Screen Capture and Video Software

TechSmith – Online Training

Certification in Web Media

BYU – Rexburg, Idaho

Associate of Science in Arts/Business

Green River – Auburn, WA

ABOUT ME

My co-workers describe me as optimistic, fun, easy to work with, and creative. My strengths are communication, relationship building, and team collaboration, and hobbies include camping, hiking, basketball, and spending time with family.

Professional Recommendations available [here](#).