## **SUMMARY**

Accomplished customer experience leader with over 15 years of expertise in leveraging AI, automation, and data analytics to optimize CX and operational performance. Skilled in utilizing platforms like Zendesk, Totango, and Salesforce to drive improvements in critical metrics. Notable achievements include a 20% boost in NPS, 10% reduction in Gross Monthly Recurring Revenue (MRR) churn, 93% first-call resolution rate, 70% increase in referral-to-appointment conversions, and 18% reduction in Cost per Contact (CPC). Through cross-functional collaboration and customer-centric strategies, I've achieved a 20% rise in customer satisfaction (CSAT), 15% increase in customer retention, 70% improvement in first-call resolution, 25% reduction in operational costs, and 30% increase in digital engagement. My focus on scalable solutions and data-driven decision-making has consistently delivered high-impact results, setting new standards for customer satisfaction and loyalty across all channels.AI & Machine Learning: Proficient in predictive analytics, natural language processing (NLP), and machine learning applications for customer experience optimization. Customer Feedback Systems (VoC): Skilled in AI-driven VoC implementation for comprehensive sentiment analysis and CX enhancements. Advanced SaaS & CRM Platforms: Experienced with Zendesk, Totango, RingCentral, and Salesforce for CX automation and customer engagement. Data Analytics & Visualization: Expert in Microsoft 365, Google Sheets, and Excel for generating actionable insights through data visualization. Cross-Functional Collaboration: Skilled at uniting Sales, Marketing, and Product teams to achieve CX objectives. KPI Management & Reporting: Adept in establishing KPIs that ensure continuous improvement and align CX with business goals. Strategic Planning and Execution: Developed and executed high-impact retention strategies and customer journey mapping that drive loyalty and engagement. Voice of the Customer (VoC) Design: Expert in designing real-time feedback systems that directly enhance CSAT and retention. Key Projects and **Initiatives** 

# cross-departmental collaboration to optimize workflows across all customer touchpoints. Results Achieved: Improved NPS by 20% and boosted

Customer Experience Roadmap Development

digital engagement by 30%, while reducing response times by 27% through workflow streamlining. Customer Feedback System Implementation Project Overview: Designed and deployed a VoC (Voice of Customer) system using Zendesk and Totango to capture and analyze real-time customer feedback. Actions Taken: Leveraged automation to handle common inquiries, allowing agents to focus on complex issues. Monitored NPS and CSAT, identifying pain points to drive strategic improvements. Results Achieved: Achieved a 93% first-call resolution rate, reduced

strategies with patient engagement goals. Actions Taken: Established clear targets for CSAT, first-call resolution, and digital engagement, and led

Project Overview: Directed the development and implementation of a comprehensive CX roadmap at Stride Care, aligning customer service

Documentation Project Overview: Developed and standardized SOPs across all service channels at Sandler Management Services to ensure consistent, highquality customer interactions. Actions Taken: Implemented automated workflows within Zendesk, enabling agents to follow standardized processes while delivering personalized support. Results Achieved: Enhanced first-call resolution by 19% and reduced operational costs by 15%,

Taken: Created Power BI and Excel dashboards that tracked CSAT, NPS, and response times. Automated reporting saved significant staff hours and provided immediate insight into service metrics. Results Achieved: Improved NPS by 15% and CSAT by 10%, with a time savings of 40 staff hours per month, aligning team performance with customer expectations. Cross-Functional Collaboration for CX Enhancement Project Overview: Drove cross-departmental initiatives at Stride Care to integrate customer feedback into Sales, Marketing, and Product

workflows. Actions Taken: Conducted weekly data-sharing sessions, using visual analytics to identify trends and pain points, which guided collaborative solutions across teams. Results Achieved: Increased customer engagement by 10%, boosted product usage by 12%, and reduced MRR churn by 10%, fostering a unified approach to customer service. Training & Development Programs Project Overview: Designed training programs for Zendesk proficiency and customer interaction quality at Stride Care and OpenDoor. Actions Taken: Developed hands-on training modules for Zendesk, along with AI-powered sentiment analysis workshops. Created a knowledge-sharing

portal to provide resources for continuous learning. Results Achieved: Reduced agent onboarding time by 30%, improved first-call resolution by

17%, and decreased ticket resolution times by 25%, equipping agents to deliver higher-quality support.

CX Business Strategy Consultant | Upwork **02/2024 to Present** • Developed comprehensive AI/ML customer feedback systems for data-driven CX improvements, capturing actionable insights to guide leadership decisions.

93%.

**EXPERIENCE** 

lag and optimizing resource allocation.

2. Situation: Upwork consultancy required real-time decision-making insights to drive operational efficiency and improve customer success outcomes.

• Task: I was tasked with creating a data analysis system that could provide immediate operational insights, reducing decision

- Action: I developed AI-powered tools using Python and integrated APIs to capture and process data on real-time customer inquiries, enabling immediate insight into service metrics. This allowed for the automation of customer segmentation and prioritization, significantly reducing manual workload.
- 09/2019 to 02/2024 • Led a team of 70 CX professionals, increasing referral-to-appointment conversions by 70% and raising first-call resolution from 74% to

• **Result**: These tools optimized workflows, leading to a 33% improvement in service delivery speed. Customer satisfaction

ratings increased by 15% due to faster response times, and operational costs dropped by 18%, thanks to automated resource

ensuring simple issues were resolved automatically, while our agents could dedicate their time to more complex inquiries. The automation also helped reduce our Cost per Contact by 18%, as we were able to optimize agent workloads effectively Fostered cross-departmental collaboration with Sales, Marketing, and Product teams, creating a unified approach to patient engagement.

• Reduced Cost per Contact (CPC) by 18% through analytics and automated workflows, while maintaining service quality. At Stride Care, I used Zendesk's automation and reporting features to streamline customer support workflows. This led to a 93% first-call resolution rate by

teams.

StrideCare.

channels.

demand increase.

channels

product improvements.

and diverse support channels.

interactions across multiple channels.

interactions across platforms and implementing scalable processes that ensured a cohesive brand experience 1. Situation: At StrideCare, daily operations faced challenges in meeting productivity and accuracy standards, given high call volumes

• Task: As Director of CX Operations, I needed to optimize daily workflows, ensuring consistent, high-quality customer

- Action: I implemented automation tools, such as RingCentral for call management and Totango for client journey mapping, to streamline workflows. I integrated these tools into a centralized CRM, enabling automated call routing based on agent availability and skill set. Additionally, I established metrics-based SOPs to standardize operations across all channels, including phone, email, and social media. • Result: This integration improved response times by 27% and first-call resolution rates by 20%. Agent productivity increased by 15% as repetitive tasks were automated, and data accuracy improved due to real-time, synchronized data entry across
  - addressed. This seamless collaboration helped reduce Gross MRR churn by 10%.1. Situation: At StrideCare, we needed to better track and measure key performance indicators (KPIs) to support service quality and customer satisfaction (CSAT). • Task: My objective was to implement a KPI framework to monitor customer service metrics like CSAT, Net Promoter Score (NPS), and team performance in real-time.

• Action: I implemented data analytics dashboards using Power BI and Excel, integrating data from Zendesk, Salesforce, and RingCentral. The dashboards provided visual KPIs on CSAT and NPS, updated hourly for immediate insights. I also used Python scripts to pull data from APIs and produce reports on response times, call resolution rates, and customer feedback

• Task: My task was to integrate customer insights and needs into the workflows of sales, marketing, and product development

• Action: I facilitated weekly cross-functional meetings where data from customer service interactions (via Totango and

Zendesk) was analyzed and translated into actionable insights. These insights guided marketing campaigns and informed

• Result: Customer engagement rates rose by 10%, and product usage increased by 12% as customer needs were proactively

Result: This approach improved NPS scores by 15% and CSAT by 10%, as team performance was better aligned with

3. Situation: Customer experience improvements required ongoing reporting to leadership to drive strategic decision-making at

strategies. • Action: I used Python to automate data collection from customer interactions and created customized Power BI dashboards for senior leadership. These dashboards included real-time KPIs, allowing for quick adjustments to strategy based on data insights. • **Result**: Leadership was able to make more data-driven decisions, with a 20% improvement in strategy response times. The

• Task: My task was to provide regular, detailed reports on service metrics to senior leadership to inform future customer service

departments. • Action: By using Totango and RingCentral for data integration, I set up weekly data-sharing sessions between the customer support, sales, and product teams. Data from customer interactions was shared in the form of visual analytics, illustrating trends and areas for improvement. I also led workshops to align CX strategies across teams.

• Result: This initiative boosted patient trust by 15% and increased customer satisfaction by 10%, as each department

proactively addressed customer pain points, resulting in a more seamless customer experience.

could access resources, tips, and common troubleshooting steps.

better equipped to handle a variety of customer inquiries independently.

- **Director of CX Operations | OpenDoor** 08/2016 to 08/2019 Implemented feedback loops and automated solutions that increased customer satisfaction by 20% and retention by 15%.
  - OpenDoor's rapid growth and increasing volume of customer interactions created the need for uniform procedures across multiple • Task: I was responsible for creating and documenting SOPs for all service channels to ensure a seamless customer experience.

• Action: I utilized tools like Zendesk and Google Docs to create, document, and roll out SOPs. Each procedure was embedded with automated reporting mechanisms and triggers, allowing agents to document interactions directly within Zendesk. I also ran training

**Result**: This initiative improved first-call resolution by 19% and reduced the average handling time by 23%. Customer feedback

sessions to align the team with the new procedures, reinforcing consistency in handling customer interactions.

received prompt, effective solutions to their issues. Manager of BPO Customer Success and Support | Sandler Management Services 05/2011 to 08/2016 • Achieved a 19% improvement in first-call resolution and a 20% increase in customer satisfaction by implementing customer-centric processes.

Scaled the team from 50 to 200 agents, introducing KPI-driven accountability measures that maintained a 90% CSAT during a 300%

 Established the BPO function as a key revenue contributor, maintaining high CSAT scores through significant service demand growth. At Sandler Training, I developed SOPs that standardized customer interactions, reducing operational expenses by 15%. This structure helped our team handle inquiries more efficiently, maintain service consistency, and allowed us to focus on enhancing service quality across all

2. Situation: Sandler Training's support operations required a more efficient method for identifying performance trends and

• Result: This focus on standards increased CSAT by 15% and drove a 23% growth in client retention, as customers consistently

- opportunities for optimization. • Action: I designed a data pipeline using SQL and Power BI, processing data on first-call resolution rates, agent productivity, and ticket resolution times. The data pipeline automated reports on these metrics and flagged anomalies in performance.
- **EDUCATION** Master of Science in Artificial Intelligence | Providence College School of Business 2023 to 2024
- **KPI Management & Reporting Data Analytics & Visualization Cross-Functional Collaboration KEY PROJECTS AND INITIATIVES**

**Bachelors Business Management** | Hartford University

**SKILLS** 

reduction in operating costs.

Designed and deployed a robust customer feedback system using Zendesk. Gathered and analyzed customer feedback to identify areas for improvement. Enhanced service quality by incorporating customer insights into business processes, leading to a 15% increase in customer

Authored and standardized SOPs for customer service teams across multiple channels (phone, email, chat, social media). Ensured consistency and

Established clear goals and KPIs for customer service operations. Developed performance monitoring tools and facilitated regular performance reviews. Achieved a 25% improvement in team performance metrics through targeted coaching and training programs.

Cost per Contact (CPC) by 18%, and increased CSAT by 15% by proactively addressing feedback trends. Standard Operating Procedures (SOP) increasing team efficiency and service consistency. Performance Management and KPI Tracking Project Overview: Established KPI frameworks and data dashboards at OpenDoor to align customer service with business objectives. Actions

 Created ROI visualization models, improving decision-making speed and accuracy for CX initiatives. • Collaborated closely with data analysts, CX strategists, and marketing teams, impacting CX planning and multi-channel execution. • Directed the design of CX roadmaps, achieving a 20% increase in customer sentiment metrics by implementing targeted feedback mechanisms. • Successfully drove stakeholder buy-in, leading to a measurable rise in overall satisfaction rates through improved insights and response strategies.

- allocation. **Director of CX Operations | Stride Care** 
  - Established a VoC program that improved patient trust by 15% and served as a template for other departments, recognized by senior management. At Stride Care, I designed a VoC program that aggregated feedback from all customer interaction channels. This approach enabled us to resolve customer issues quickly, leading to a 93% first-call resolution rate. The program's success highlighted how critical it is to integrate feedback into our daily operations to drive customer satisfaction At Stride Care, I focused on a seamless omnichannel experience across web, mobile, and social media to improve customer engagement by 10%. This involved aligning our customer
    - systems. 2. **Situation**: Cross-functional collaboration was necessary at StrideCare to align customer service with broader business goals.
      - trends. customer expectations. The streamlined reporting saved 40 staff hours per month, previously spent on manual data entry.
      - by 10%. 4. Situation: StrideCare's customer experience needed to be more cohesive, especially given interactions across various support channels.

• Task: My goal was to enhance CX through cross-functional collaboration, ensuring alignment on customer needs across all

transparency of performance metrics also helped align team goals with organizational objectives, reducing Gross MRR churn

5. **Situation**: StrideCare agents needed to be proficient in using Zendesk to ensure optimal workflow and efficiency. • Task: My task was to create a comprehensive training program to boost agent proficiency with Zendesk, equipping them with skills for automation and personalized support.

• Action: I developed a structured training curriculum that included hands-on Zendesk simulations, real-world scenarios, and automated follow-up assessments. To reinforce learning, I set up a knowledge-sharing portal in Google Drive where agents

**Result**: This program reduced agent onboarding time by 30% and improved first-call resolution rates by 17%, as agents were

trends. For instance, tracking feedback in real time allowed us to respond quickly to service issues and implement changes that significantly improved our retention rate by 15% Directed a 50-member CX team, including support agents, project managers, and data analysts, ensuring consistent, high-quality support.

retention. At OpenDoor, I led cross-functional collaboration between product, marketing, and support teams to address customer feedback effectively. By developing feedback loops and ensuring each department was aligned on customer expectations, we increased satisfaction

scores by 20%. This approach underscored the importance of unified goals across teams in driving customer satisfaction 3. **Situation**:

OpenDoor, I led a metrics-focused VoC initiative where we increased customer satisfaction scores by 20% by focusing on NPS and CSAT

• Improved first-call resolution by 19% and drove a 23% growth in client accounts by deploying tailored success strategies. In my role at

• Implemented an ongoing feedback loop program that addressed customer pain points within 24 hours, resulting in a 15% increase in

highlighted a 15% improvement in service consistency across channels. 2. **Situation**: OpenDoor's services needed to improve in both consistency and personalization. • Task: My task was to establish service standards to ensure high-quality interactions across all channels and drive customer satisfaction. • Action: I implemented Zendesk's analytics to monitor interaction quality and implemented feedback loops where service issues were

flagged for management attention. By tracking data on customer interaction types and developing resolution templates, I ensured that

improvement areas. • Task: I needed to establish an analytics process that would allow for the identification of key trends, process gaps, and

each team member followed consistent protocols while personalizing responses as needed.

Reduced operational costs by 15% through automation and process streamlining.

10%, positively impacting both CSAT and NPS scores.

Relevant coursework includes Customer Experience Management, Data Analytics, and Business Strategy.

• Action: I utilized Zendesk for Voice of the Customer (VoC) insights, implementing sentiment analysis to evaluate customer feedback. The data was analyzed weekly, with key insights discussed during leadership meetings. This feedback guided adjustments to processes and employee training.

• Result: As a result of this continuous improvement cycle, escalations were reduced by 15%, and repeat contacts decreased by

3. **Situation**: Sandler Training's focus on CX required continuous improvement in service quality based on real-time feedback.

• Task: My objective was to collect, analyze, and act upon customer feedback to enhance service delivery.

• Result: By identifying and addressing performance trends in real-time, I enabled a 19% improvement in first-call resolution and reduced escalations by 12%. These enhancements translated into a 20% increase in customer satisfaction and a 15%

- **Advanced SaaS & CRM Platforms AI & Machine Learning Customer Feedback Systems (VoC)**
- Led the development and execution of a comprehensive customer experience (CX) roadmap. Implemented key strategies to improve customer satisfaction, including workflow optimization and response time reduction. Resulted in a 20% increase in Net Promoter Score (NPS) within one

efficiency in service delivery, contributing to a significant reduction in error rates and a 10% increase in productivity.

**Customer Feedback System Implementation** 

**Customer Experience Roadmap Development** 

satisfaction scores (CSAT). **Standard Operating Procedures (SOP) Documentation** 

**Performance Management and KPI Tracking** 

**Cross-Functional Collaboration for Customer Experience Enhancement** 

**NEW SECTION** 

support functions with business goals, resulting in enhanced overall customer experience.

Collaborated with business units to address customer needs and streamline interactions. Fostered a customer-centric culture by aligning customer