

**Morgan Lee**

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## **Professional Summary**

**Enthusiastic Junior Account Manager with 2+ years of experience supporting client relationships and driving account growth in the SaaS and marketing sectors. Skilled in project coordination, client communication, and delivering tailored solutions to meet business objectives. Proven ability to increase client satisfaction scores by 20% through proactive engagement and problem-solving. Passionate about building trust, collaborating with teams, and contributing to revenue goals with a customer-first mindset.**

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## **Core Competencies**

- **Client Relationship Management**
- **Account Coordination & Support**
- **Project Management Basics**
- **CRM Tools (Salesforce, HubSpot)**
- **Data Analysis & Reporting**
- **Negotiation & Upselling**
- **Team Collaboration**
- **Presentation & Communication Skills**
- **Time Management & Prioritization**

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## **Professional Experience**

- **Junior Account Manager**
- ***PeakPulse Software, Austin, TX***

***July 2022 – Present***

- **Manage a portfolio of 15+ small-to-mid-sized SaaS clients, maintaining a 95% retention rate by addressing needs and resolving issues promptly.**

- Collaborate with sales and product teams to upsell features, contributing to a 10% increase in account revenue over 12 months.
  - Prepare and deliver quarterly business reviews to clients, using Salesforce dashboards to highlight KPIs and recommend growth strategies.
  - Streamlined onboarding processes for new accounts, reducing setup time by 15% and improving client satisfaction scores by 20%.
  - Account Coordinator
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- *Vivid Marketing Agency, Dallas, TX*

#### *June 2021 – June 2022*

- Supported 3 senior account managers in managing 25+ client accounts, ensuring timely delivery of marketing campaigns and reports.
  - Acted as the primary point of contact for client inquiries, resolving 90% of issues within 24 hours and earning positive feedback in surveys.
  - Assisted in creating project timelines and tracking deliverables using Asana, keeping 95% of projects on schedule.
  - Compiled performance data into client-facing reports using Excel and Google Sheets, improving transparency and trust.
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### **Education**

- Bachelor of Business Administration (Major in Marketing)
- *Texas State University, San Marcos, TX*

#### *Graduated: May 2021*

- Cumulative GPA: 3.6/4.0
  - Member, Business Networking Association
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### **Certifications**

- HubSpot Sales Software Certification – 2022
  - Google Project Management Certificate – 2023
  - Certified Customer Success Manager (Level 1), SuccessHACKER – 2022
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### **Technical Skills**

- **Tools:** Salesforce, HubSpot, Asana, Slack, Microsoft Office Suite (Excel, PowerPoint)
  - **Platforms:** Google Workspace, Zoom, Tableau (basic proficiency)
  - **Other:** CRM data entry, email marketing tools (Mailchimp)
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## **Projects**

- **Volunteer Account Support**
- *Local Nonprofit, Austin, TX*

### ***September 2022 – Present (Part-Time)***

- **Assisted in managing donor relationships and coordinating fundraising campaigns, raising \$5K+ for community programs over 6 months.**
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## **Additional Information**

- **Languages:** Fluent in English, conversational Mandarin
- **Interests:** Photography, networking events, podcasts on customer success