

PROFESSIONAL EXPERIENCE

allUP

Customer Success Lead

January 2025 - February 2026

- **CUSTOMER SUCCESS LEADERSHIP:** Owned the customer success function at allUP, building ticketing workflows, documentation systems, and support processes that established a scalable foundation for client support.
- **OPERATIONS MANAGEMENT:** Managed customer communication and support operations, handling 17,000+ messages annually while maintaining systematic tracking and resolution workflows.
- **KNOWLEDGE BASE DEVELOPMENT:** Built and maintained a comprehensive company knowledge base for Front and Claude AI integration, creating documentation that enabled efficient customer support.
- **PRODUCT COLLABORATION:** Partnered with founders and product teams to act as the voice of the customer, structuring qualitative and quantitative feedback into actionable insights that shaped the product roadmap.
- **AI AUTOMATION DEVELOPMENT:** Collaborated with engineering leadership to develop an AI-powered customer support system using OpenAI Agents SDK that automatically generates contextual email draft replies.
- **AI AGENT TRAINING:** Built and trained specialized AI agents for message categorization and response generation, achieving 98%+ categorization accuracy through iterative prompt engineering and evaluation workflows across rejection, positive, and support scenarios.
- **TESTING INFRASTRUCTURE:** Developed comprehensive testing infrastructure including evaluation datasets, TypeScript test scripts, and manual review processes; reviewed 100-300 traces per batch to achieve high-quality draft outputs and continuous improvement.
- **TECHNICAL WORKFLOW:** Established end-to-end development workflow integrating Cursor IDE, Git version control, OpenAI Agent Builder, and Braintrust for continuous agent improvement and systematic performance tracking.

Advekit, Inc.

Senior Patient Onboarding Coordinator, Customer Success

June 2022 - April 2024

- **OPERATIONAL SYSTEMS:** Built a comprehensive Notion workspace that enhanced transparency and refined operational processes, increasing sales revenue and strengthening client retention through improved visibility and streamlined workflows.
- **ACCOUNT MANAGEMENT:** Managed patient onboarding and client accounts, guiding customers through the completion of initial sessions while ensuring smooth handoffs and positive early experiences that set the foundation for long-term engagement.
- **RETENTION CAMPAIGNS:** Developed retention campaign materials including patient explainers and targeted email sequences that reignited revenue growth among inactive clientele, bringing dormant accounts back into active treatment.
- **WEB DESIGN:** Designed and created engaging web pages to attract mental health providers, optimizing for user engagement and conversion rates that supported provider acquisition goals.
- **DATA MANAGEMENT:** Streamlined account reconciliations and client data consolidation, effectively supporting therapist acquisition efforts and driving increased sales through improved data accuracy and operational efficiency.

Patient Onboarding Coordinator

Jan 2021 - June 2022

- **INSURANCE VERIFICATION:** Verified plan coverage data for patients nationwide through clearinghouses like Availity and communicated directly with Insurance Consultants.
- **COVERAGE OPTIMIZATION:** Ensured optimal coverage utilization for each client by communicating anticipated cost plans to clients and providers.
- **REFERRAL MANAGEMENT:** Led submissions of referral requirements to insurance companies for patients and providers, eliminating obstacles and ensuring seamless processes that accelerated time-to-treatment.
- **CRM AUTOMATION:** Employed CRM platforms such as HubSpot to automate targeted outreach campaigns, enhancing efficiency and effectiveness of patient acquisition efforts.

Therapist Acquisition Specialist

July 2020 - Jan 2021

- **ONBOARDING MANAGEMENT:** Oversaw onboarding process for mental health providers, ensuring an effortless and dependable customer experience.
- **STAKEHOLDER ENGAGEMENT:** Presented company mission and operations to engage prospective providers, establishing relationships as a trusted third-party while consistently meeting monthly KPIs.

SKILLS

Mandarin	Microsoft: Excel, PPT, Word	Cursor IDE	Notion	Customer.io
Python, R, SQL	Adobe: Photoshop, Illustrator, InDesign	Anthropic Claude / Claude Code	Figma	Front
TypeScript	OpenAI Agents SDK	Git / GitHub	Braintrust	HubSpot

EDUCATION

Boston University | Bachelor of Science, Advertising (Minor: Business Administration) | 2020