Jeet Mehta

- **7+ years of total experience in Customer Success, Project Management and Technical Evangelist with a demonstrated history of working in the Product (SaaS) and Services (web/app) based industry.**
- **Skilled in Project Management, Product Management, Customer Management, Technical Pre-sales, and Post-sales.**
- **Serve as the primary point of contact and lead the relationships for a specific set of accounts to ensure projects are delivered on time withing the specified SOW, defined deliverables and as per the Project Charter. Working closely with product, BA and sales team to define SOW and deliverables.**
- **Working with C-level suite to create vision and goals of the project and ensuring quick product adoption.**
- **Key communicator between stake holders.**
- **Customer Onboarding: Managing and Streamlining end-to-end customer onboarding process, ensuring seamless and positive customer experience.**
- **Strong Product management and services with professionally focused on Output orientation.**
- **Automation and API integration.**

Flexible and Open to adopt new changes.

Skills

- **Account Management**
- **Project Management**
- **Customer Success**

- **Planning and Risk Management**
- **Interpersonal**
- **Pre-sales and Post-sales**

- **Customer Relationship Management (CRM)**
- **Adaptive**
- **Meeting Facilitation**

- **Product Management**
- **Customer Advocacy**
- **Agile Scheduling**

- **Scope and Requirements Management**

Experience

Customer Success Manager
Simform
Ahmedabad, Mar 2023 – Present

- Customer Advocacy, Act as customer advocate withing the company, communicating customer needs and feedback to the product and services team.
- Acting liaison between Customer and Development team
- Customer Onboarding: Ensuring customer have a smooth onboarding experience and providing ongoing support to address issues encountered by customer. Nurturing and Keeping Customer engaged by conducting training sessions, monitoring customer feedback to improve the process.
- Project initiation: understanding the project by going through contracts and other available documents.
- Project Kick-off: Set up right expectations within the team to understand the Project Scope and Customer kick-off to set correct expectations.
- Ensuring a positive customer experience, keeping an eye on blockers and showstoppers in the product development process.

Client Account Manager
Cygnet Infotech
Ahmedabad, Mar 2022 – Mar 2023

- Customer Success and Experience
- Customer Onboarding and Created end-to-end customer journeys.
- Understanding the Business Objective to define macro-Primary goal and micro-Actions in Data Collection and keeping track of the user stories.
- Leadership Calls with Internal and External Stake holders
- Project Management and end-to-Implementation - UAT Testing
- Data Analysis and Data Massaging (cleaning up to and setting logics to make it usable)
- Interaction with various members of cross-functional teams to ensure focus and delivery of services and solutions. Work with product, sales, and onboarding for the appropriate client journey
- Business Requirement Document (BRD), Functional Requirement Document (FRD), Software Requirement Specification, (SRS) Scope of Work (SOW) Elicitation as well as Preparation
- User Stories, Requirements Gathering and CR (Change Request) Documents
- Process Flow Diagrams, prioritization of content
- Closely working with customer onboarding policies, technical integration of fintech products and web/app-based products
- Summarize product requirements, business objectives, project as well as product planning, success, and implementation.
- Purchase Automation, ERP Integration, Intelligent Document Processor
- Tax Tech and FinTech Product Management, Automation, Services and Solution
- Techno Integration and Automation

Technical Evangelist

ASC Technology Solutions LLC, Mumbai

Mumbai, Mar 2020 - Feb 2022 (2 years)

*Trisita and ASC are sister concern companies. Till 6+Years I have worked under the same Management

- Project Management and Product Management
- Technology Solution Provider and defining the project scope
- Agile and Responsive to changing business needs
- Customer Success and Experience- Working with cross-functional Team
- Up-selling and Cross-selling
- Maintaining strong customer Relationship and Customer Retention
- Delivering Actionable insights for Customer Experience Improvement
- Aligning stakeholders around the vision for the product
- Understanding and representing user needs
- Monitoring the market and developing competitive analyses

- Defining a vision for a product and Prioritizing product features and capabilities
- Application Pre-sales and Technical Product Management
- Tailormade software demonstration as per client's scope
- Working with cross-functional Team
- Collaborating with top architects and construction professionals pan India
- Investigate and resolve issues that are reported on time
- Adopting Industry Trend and Technology
- Extensive Travel and Clients meeting
- From presenting application to implementation stage cycle
- Defining SOW to meet clients' expectations.

Technical Manager

Trisita Engineering PVT Ltd.

Mumbai, Feb 2018 - Feb 2020 (4 years 1 month)

- AEC (Architecture, Engineering and Construction) Industry
- Software/Application Pre-sales and Post-sales activates
- Software Demonstration as per client's scope
- Maintaining Customer Relationship to gain insights
- CAD application technical support specialist
- Software/Application Pre-sales and Post-sales
- Onsite Autodesk Products Implementation
- Network License Management and Tracking
- Agile Problem Solving
- Priority handling and escalation of critical issues and monitoring of service level compliance

TRISITA **Senior Technical Support Specialist**

Trisita Marketing (P) Ltd.
Mumbai, Feb 2017 - Feb 2018 (1 years 1 month)

TRISITA **Technical Support Executive**

Trisita Marketing (P) Ltd.
Mumbai, Feb 2016 - Feb 2017 (1 year 1 month)

Education

SARDAR VALLABHBHAI PATEL INSTITUTE OF TECHNOLOGY, VASAD, 041

GUJARAT Technological University

Bachelor of Engineering - BE, Civil Engineering (2009 – 2015)

Licenses & Certifications

Inbound Marketing Certificate - HubSpot Academy
Issued Jul 2018 - Expires Aug 2020

Social Media Strategy - HubSpot Academy
Issued Jul 2018 - Expires July 2020