



MERIN MATHAI

CUSTOMER SUCCESS MANAGER

PERSONAL PROFILE


I am a Customer Success Manager. With overall 7 + years in SaaS industry and client-facing experience. I like to provide a solution tailored to the customer's needs is what drives me every day to work.

WORK EXPERIENCE


Sr.Manager Customer Success (Syndication Pro)
First Principles Management Pvt Ltd | Oct 2022 - till now

- Onboard and assist customers as needed with product demonstration, setup, navigating, and training of the software.
- Establish frequent touchpoints with the customer to improve customer experience.
- Managed **500 + SMB accounts** and was responsible for driving **cross-sales and up-sales of \$25000**.
- Maintain a detailed understanding of products and services with **Salesforce CRM**, assist customers with questions, and suggest the best products for their needs.
- Optimize existing processes within the company and actively enhance all Customer Success initiatives with **Salesforce CRM & with the help of ASANA**.
- Experience work week to promote the value of the product and upsell services and products with brand image and promoting value through customer experience.
- Review customer complaints and concerns and seek to improve all aspects of the customer experience with the help of the internal support team.
- Schedule **EBR meetings** and establish clear retention goals and process milestones for the client to work toward.
- Minimize customer churn

CONTACT ME AT

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SKILLS SUMMARY

HUBSPOT CRM

ZOHO CRM

ACCOUNT MANAGEMENT

CUSTOMER RELATIONSHIP
MANAGEMENT

SaaS CUSTOMER SUCCESS

CROSS SALES,UPSELL

MS - POWERPOINT

MS - EXCEL

RENEWAL MANAGEMENT

ASANA

SALESFORCE CRM

CUSTOMER ONBOARDING

PRODUCT TRAINING

SKILLS SUMMARY

DATA VISUALISATION

POWER BI

FRESHDESK

FRESHCHAT

STRIPE PAYMENTS

SLACK

SALES ENABLEMENT

LEADSQUARED CRM

RENEWAL MANAGEMENT

CHURN MANAGEMENT

VLOOK- UP & PIVOT TABLE

CUSTOMER DELIGHT

CUSTOMER DELIGHT

COST MANAGEMENT

DATADOG

ZOOM , G - MEET, CISCO WEBEx

NOTION

CUSTOMER MANAGEMENT

MS WORD

Onboarding Manager (SaaS Company)
Plum Benefits Pvt Ltd | Aug 2021 - Sept22

- **Implementation:** Onboarding clients such as SME, MSME, converting them through mails and calls.
- Managing 100 + accounts as Onboarding Manager in **HUBSPOT CRM**
- Handle **Churn Management** of existing clients, **Manage Renewals**.
- Managing low failure rates of services, handling customer through **freshchat & freshdesk**.
- Managed admin training session and employee training session
- Handling follow up with insurers for policy copies.
- Handled internal stakeholder communication with **Slack** channel.
- Responsible for maintaining a high-performing customer retainment through by followups with internal stakeholders in **Slack** Channel
- Making sure about the internal SLA are met
- Ensuring that policy copy is duly availed on TAT promised.
- Managing low failure rates of services, handling customer queries/tickets through **Tawk. co** and **Freshdesk** as a Customer Success Executive.

Customer Success Manager (Cloud SaaS Company)
Tracxn Technologies Pvt Ltd | Sep 2019 - Jul 2021

- **Customer Acquisition and Conversion:** Source new opportunities through onboarding and convert them through mails and calls.
- Handle **Churn Management** of existing clients; **drive Referral Programs, Manage Renewals**.
- Managing low failure rates of services, handling customer queries through **INTERCOM** as a Customer Success Manager.
- Creating operational efficiencies, customer delight, and wow the customers through service on Tracxn Dashboard
- Responsible for managing operations (quality of service and escalations) through automated spreadsheets ensuring high quality customer experience
- Responsible for maintaining a high-performing customer retainment with enhanced verbal and written communication through **ZOHO CRM**
- **Cost management:** For all clients, to keep costs under guidelines.

CERTIFICATIONS

- Advance Post Graduate Programme in Strategic Mngt. (IIM Kashipur)
- HUBSPOT CRM CERTIFICATION
- GOOGLE DIGITAL - UNLOCKED CERTIFICATION ON DIGITAL MARKETING CERTIFICATION
- Google Project Management
- HUBSPOT SALES MANAGEMENT CERTIFICATION
- HUBSPOT INBOUND SALES CERTIFICATION
- HUBSPOT SALES ENABLEMENT CERTIFICATION
- HUBSPOT SOCIAL MEDIA MARKETING CERTIFICATION
- HUBSPOT CONTENT MARKETING CERTIFICATION
- LINKEDIN CUSTOMER SUCCESS FUNDAMENTALS
- CCCBC - CERTIFICATE FOR CROSS COUNTRY BUSINESS COMMUNICATION.
- CLOUD COMPUTING FROM GREAT LEARNINGS
- SAAS in CLOUD COMPUTING CERTIFICATION
- POWER BI CERTIFICATION

Business Development Manager

Indusind Bank Pvt Ltd | 2018 - 2019

- Responsible for achieving the business objectives of the Retail Liabilities Sales Team for the branch and meet value and channel productivity metrics.
- Generated revenue through the sale of CASA and third party products
- Drive numbers and values
- Organized various lead generation activities for the branch
- Ensured defined parameters are met for the opening of a new account are met in terms of documents collected i.e IP Cheque etc
- Ensure quality of service is maintained as per the standard set
- Training new recruits on the launch of new products

Officer - Product Operations

Tesco HSC | 2016 - 2018

- Ensuring new product set up is done in ORMS - Oracle Retail Management System.
- Handling price management through ORPM - Oracle Retail Promotion Management
- Managing all promotion on dashboard
- Being the key liasion between internal stakeholder and external stakeholder.
- Conducted meeting often between ireland stakeholders and indian stakeholder.
- Drive the changes in ORMS
- Responsible for the changes in promotional code that runs ORMS.
- Making sure about SLA is met.
- Handling Invoice Queries • Loading Promotions in ORPM for ROI Stores
- Worked on Margins Queries with suppliers
- Handling Store Invoicing Queries
- Promotion Amendments

STRENGTH

PATIENCE

DILIGENCE

DEDICATION

COORDINATION

SELF - MOTIVATED

STRATEGY BUILDING

STRONG RELATION BUILDING

Education

- 2021 -- Advance Post Graduate Programme in Strategic Management from IIM Kashipur
- 2014 -2016 -- Post Graduate Diploma In Management (Marketing & Finance) from Institute of Professional Education and Research (IPER), Misrod, Bhopal (Approved by AICTE, GoI, New Delhi).
- 2011 - 2014 -- Bachelor of Management (B.A Management) from Bhopal School Of Social Science (BSSS), Barkatullah University, Bhopal.

Personal Profile

Date of Birth : 13th November 1992

Nationality : Indian

Linguistic Skills : English & Hindi (Spoken & Written)

Hobbies : Basket Ball, Fooseball, Surfing OTT platform.

Passport No. : U5281946 valid up to 31-03-2031

Current Address : Flat No 102,Rajathaadri
Apartment,Kadubeesanahalli,Marathalli Road,Bangalore

Dated: 02-08-2023
MERIN MATHAI)