

Daniel C. Hoffkins

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SUMMARY

Senior customer experience and operations leader with 10+ years building and scaling post-sale success functions across SaaS and healthcare technology. Proven track record leading enterprise teams through complex client integrations, driving retention and revenue through process design, data visibility, and cross-functional alignment. Skilled at bridging commercial and technical domains to ensure seamless partner onboarding, adoption, and growth.

CORE SKILLS

Leadership & Strategy

Customer Experience (CX) Strategy | Operational Excellence | Voice of the Customer (VoC) | Budget & Resource Planning | Change Management | Team Coaching & Development

Customer Support Operations

Omnichannel Support (Phone, Chat, Email) | Escalation Management | SLA & FCR Performance | CSAT & CES Optimization | Post-Sale Implementation & Support Models | Incident Management

Systems & Tools

Zendesk | Salesforce | HubSpot | Looker | Tableau | Talkdesk | Notion | Confluence | Jira | SOP Playbooks | AI & Automation

EXPERIENCE

CertainlyCX

Remote

Head of Operations & Business Development (fractional)

Dec 2024 – Present

- Built and optimized scalable onboarding and integration workflows to support enterprise client implementations, improving delivery readiness and time-to-value.
- Partnered cross-functionally with client success and sales leadership to align operational readiness with commercial commitments and SLAs.
- Designed onboarding materials, SOPs, and QA playbooks to support service consistency and scale.
- Automated workflows in HubSpot and Notion to streamline implementation and improve visibility.

Naya Health

New York, NY

Director, Customer Operations

Jan 2023 – Dec 2023

- Led a 14-person blended post-sale operations team responsible for onboarding, integration success, and enterprise client retention.
- Reduced average time-to-integration from 21 to 14 days by redesigning and implementing proactive onboarding workflows and feedback loops, improving CSAT and NPS by 20% within two quarters.
- Collaborated with Product and Engineering to refine integration processes and data flows across Salesforce and Zendesk.
- Reported on client adoption, retention risk, and integration health to inform strategic renewal and expansion conversations.
- Created workforce reports in Salesforce and Zendesk, improving volume forecasting accuracy by 30%.
- Provided after-hours support for critical escalations and ensured 24/7 incident coverage through on-call rotation planning.

Virta Health	San Francisco, CA
Senior Manager, Customer Success Operations	Jul 2022 – Jan 2023
<ul style="list-style-type: none"> Managed customer onboarding and integration operations for high-growth healthcare clients, bridging product capabilities and enterprise systems. Built and automated dashboards in Looker and Salesforce to track integration health, engagement, and retention trends, enabling data-driven decisions across Customer Success and Product teams. Reduced manual troubleshooting time by 10 hours per week by streamlining onboarding workflows and documentation. Implemented data-driven engagement and retention strategies that improved integration adoption and long-term client health. 	
Sema4	Stamford, CT
Associate Director, Customer & Business Operations	Jun 2020 – May 2022
Manager, Client Services	Jul 2018 – Jun 2020
<ul style="list-style-type: none"> Directed onboarding and systems integration for 25+ enterprise healthcare clients, aligning implementation milestones with technical and commercial objectives. Implemented omnichannel support (email, phone, portal) using Salesforce and Talkdesk, enabling 50% faster response times. Designed onboarding materials, SOPs, and QA playbooks to support service consistency, including call/case audits and agent feedback loops. Managed internal and BPO support teams serving diagnostic and oncology client populations. Created Tableau dashboards to track KPIs, drive performance, and ensure audit readiness. Reduced response times by 50% and cut manual work by 25% through automation and documentation improvements. Collaborated across compliance, product, and field sales to ensure integrated service delivery and sustained client satisfaction. 	
Flatiron Health	New York, NY
Director, Support & Customer Operations	Aug 2017 – May 2018
<ul style="list-style-type: none"> Improved team productivity by 10% and cut urgent ticket resolution time by 80% via revamped SOPs and shift coverage strategies. Oversaw a 24/7 enterprise support and integration team supporting oncology clients using EHR and data-driven research platforms, ensuring reliability and uptime across client systems. Built team SOPs and performance dashboards to improve responsiveness and internal coordination. 	
FactSet Research Systems	Norwalk, CT
Associate Director, Platform QA	Apr 2015 – Jul 2017
Systems Engineer, Tech Solutions	Apr 2011 – Apr 2015

EDUCATION

Bachelor of Business and Technology	Storrs, CT
University of Connecticut	

INVOLVEMENT

Support Driven - Aspire Mentorship Program	Remote
Mentor to Emerging CX Professionals	