

# Daniel C. Hoffkins

📍 Redding, CT ✉ daniel.hoffkins@gmail.com ☎ (203) 496-7937 🔗 linkedin.com/in/dan-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.

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## 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

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## EXPERIENCE

### CertainlyCX

#### Head of Operations & Business Development (fractional)

Remote  
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.

### Nayya Health

#### Director, Customer Operations

New York, NY  
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****Senior Manager, Customer Success Operations**

San Francisco, CA

Jul 2022 – Jan 2023

- 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****Associate Director, Customer & Business Operations**

Stamford, CT

Jun 2020 – May 2022

**Manager, Client Services**

Jul 2018 – Jun 2020

- 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****Director, Support & Customer Operations**

New York, NY

Aug 2017 – May 2018

- 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****Associate Director, Platform QA**

Norwalk, CT

Apr 2015 – Jul 2017

**Systems Engineer, Tech Solutions**

Apr 2011 – Apr 2015

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**EDUCATION****Bachelor of Business and Technology**

Storrs, CT

University of Connecticut

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**INVOLVEMENT****Support Driven - Aspire Mentorship Program**

Remote

Mentor to Emerging CX Professionals