

DHRUVIN SHAH

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PROFESSIONAL SUMMARY

Revenue Operations & Customer Success Leader with 9+ years driving sustainable growth in SaaS and FinTech across North America and EU markets. Proven expertise in:

- Scaling high-performing teams (0-70 advisors) with 97% client retention
- EU Compliance & GDPR implementation across multi-jurisdiction operations
- Revenue Operations optimization using Salesforce, HubSpot, and data-driven analytics
- Enterprise account management with focus on CLV optimization and NRR growth
- Cross-functional leadership in fast-paced, growth-stage environments

Currently based in Helsinki with valid work permit. Seeking Customer Success Manager, Sales Operations, or Compliance Operations roles where English is the working language.

CORE COMPETENCIES

Customer Success & Account Management: Client Onboarding | Product Adoption | Enterprise Account Management | Customer Retention | Upsell/Cross-sell Strategy | Business Reviews | CLV Optimization | NRR Focus

Sales Operations & Revenue Operations: Sales Process Design | CRM Management (Salesforce, HubSpot) | Pipeline Forecasting | Revenue Forecasting | Sales Methodology Implementation | Compensation Management | Performance Dashboards

EU Compliance & Regulatory Operations: GDPR Compliance | Data Privacy & Protection | EU Regulatory Framework Implementation | Multi-jurisdiction Compliance | Risk Assessment & Mitigation

Team Leadership & Development: Team Building & Scaling | Recruitment & Talent Development | Staff Training & Onboarding | Performance Management | Cross-functional Collaboration

Technical Skills: Salesforce CRM | HubSpot | SQL | Data Analysis & Visualization | Excel | Advicent NaviPlan | Thomson Reuters Eikon | Riskalyze | DocuSign

PROFESSIONAL EXPERIENCE

Senior Marketing Director / Financial Advisor

Transamerica Financial Advisers, San Jose, CA | May 2019 – November 2025

Business Growth & Team Scaling:

- Built and scaled financial advisory agency from 0 to 70 licensed advisors serving 600+ clients, maintaining 97% client persistency rate (industry benchmark: 85%)
- Led expansion strategy across 4 major locations driving 40% revenue growth and establishing market presence across 14 US states
- Achieved #1 Producer and #1 Recruiter recognition in Northern California (2017-2018)
- Earned Million-Dollar Agency Award (2020) and Chairman Award for Persistency - 97% (2020)

Revenue Operations & CRM Implementation:

- Implemented integrated CRM systems (Salesforce + HubSpot) and standardized sales processes improving team efficiency by 35%
- Designed compensation and incentive programs that increased sales performance by 25% while improving team retention
- Maintained regular business reviews with key clients ensuring 95%+ satisfaction scores and identifying \$2M+ annual upsell opportunities

Compliance & Risk Management:

- Established compliance frameworks for multi-state regulatory requirements, ensuring 100% adherence to financial regulations
- Managed client data privacy across multiple jurisdictions, implementing best practices for regulatory compliance

Customer Success & Adoption:

- Conducted financial briefings for US National Guard achieving 90% conversion ratio
- Implemented client onboarding processes that reduced time-to-productivity by 30% and improved new client satisfaction scores

Marketing Director / Financial Advisor

Transamerica Financial Advisers, San Jose, CA | March 2017 – May 2019

- Developed and executed marketing strategies building wealth management network of 300+ clients
- Managed \$50M+ client portfolios and delivered consistent revenue growth through strategic account management
- Trained 50+ advisors in financial needs analysis, establishing standardized sales methodology

Licensed Financial Associate

Transamerica Financial Advisers, Fresno, CA | October 2016 – March 2017

- Provided financial advisory services for 100+ clients, achieving 85% client conversion rate
- Supported team training and development initiatives, onboarding 15+ new advisors

EDUCATION

Master of Arts in Economics

Sabarmati University, Ahmedabad, India | December 2022 | GPA: 3.7

Specialization: Financial Markets, Risk Analysis & Regulation

Bachelor of Arts in Economics

California State University, Fresno | May 2016 | GPA: 3.4

Specialization: Macroeconomics, Statistics & Financial Markets

PROFESSIONAL CERTIFICATIONS

- Certified Customer Success Manager (CCSM) – Success Coaching
- Certified Revenue Operations Professional (CROP) – Revenue Collective
- FinTech Industry Professional (FTIP®) – Corporate Finance Institute
- Salesforce AI Specialist Certification – Salesforce Trailhead
- HubSpot Revenue Operations Certification – HubSpot Academy
- CFTE FinTech Masterclass – Centre for Finance, Technology & Entrepreneurship

LANGUAGES

English – Fluent (Business & Professional) | Hindi – Native | Gujarati – Native

KEY ACHIEVEMENTS

97% Client Retention (vs 85% benchmark) | 40% Revenue Growth | 35% Efficiency Improvement | 25% Sales Performance Increase | 100% Compliance Adherence | 90% Conversion Rate | \$2M+ Annual Upsell Opportunities | 0-70 Team Scaling

ADDITIONAL INFORMATION

Current Location: Helsinki, Finland

Work Authorization: Valid work permit

Availability: Available to start immediately

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