

# KATIE KELLY

## Customer Success & Implementation Executive | Onboarding & Platform Adoption

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### Executive Summary

Customer success and implementation executive specializing in activation, onboarding, and adoption for growth-stage fintech and SaaS platforms. Track record implementing operating models for 50+ person global organizations and building high-performing multi-manager CS teams (25+ professionals, 5+ managers) from the ground up. Expert at scaling operations across Scaled, Commercial, and Enterprise segments while improving activation rates, reducing time-to-value, and partnering with Sales, Product, and Finance to drive retention and expansion.

### Key Achievements

#### Leadership & Team Building

- Built customer success organization from 3 to 25+ professionals with 5+ managers in 12 months following promotion.
- Implemented operating model for 50+ person global delivery organization with direct management of Mid-Market and SMB segments, achieving 60% efficiency improvement while increasing output 20% despite 25% workforce reduction.
- Doubled annual implementation volume from 250 to 500+ while maintaining enterprise-grade delivery.

#### Customer Success & GTM Impact

- Led 75+ client-facing platform and SaaS implementations in regulated financial environments, delivering 95%+ on time.
- Improved time-to-value by 50% by reducing implementation timelines from 3 months to 6 weeks for SMBs and mid-market clients.
- Partnered with Sales, Account Management, and Product to drive \$500K in annual savings through strategic product automation.
- Set strategic vision for global client delivery operations, directing a 50+ person organization to align delivery standards.

### Experience

#### iCapital

New York/Boston

#### Senior Vice President, Operations and Client Delivery

01/2024 - Present

Promoted to build and lead specialized customer success and implementation organization for alternative investment fintech platform. Own post-sale activation, onboarding, and platform adoption across Scaled, Commercial, and Enterprise segments, reducing time-to-value and driving spend ramp for wealth managers, advisors, and asset managers.

- **CS Organization Building:** Built customer success organization from 3 to 25+ professionals within 12 months, establishing multi-layered leadership model with 5+ frontline and second-line managers. Created scalable frameworks for hiring, coaching managers and ICs, and career development that elevated team performance and increased retention.
- **Activation & Platform Adoption:** Own post-sale activation journey driving product adoption and time-to-value. Drive 500+ annual product onboardings across Scaled, Commercial, and Enterprise segments. Improved time-to-value by 75%, reducing product implementation timelines from 8 weeks to 2 weeks through systematic rollout redesign.
- **Playbooks & Scalable Processes:** Developed standardized onboarding playbooks, templates, and SOPs across customer segments. Created role-task matrices, coverage ratios, and documentation infrastructure that enabled consistent delivery quality while scaling capacity. Reduced employee ramp time by 75% (3 months to 4 weeks) through systematic training frameworks.
- **GTM Partnership & Alignment:** Partner closely with Sales on implementation handoffs and with Account Management on expansion signals throughout the GTM funnel. Collaborate with Product and CX to design workflows and feedback loops that drive adoption, retention, and expansion.
- **Metrics & Performance Management:** Instrument dashboards tracking activation effectiveness, spend ramp velocity, product adoption by feature, time-to-value, and team productivity. Use data to identify bottlenecks, optimize onboarding playbooks, and forecast key business outcomes. Report segment performance to senior leadership.
- **Operational Excellence:** Doubled annual implementation volume from 250 to 500+ while maintaining enterprise-grade delivery across complex regulatory and integration requirements. Drive consistent quality and outcomes across customer tiers.
- **Culture & Team Excellence:** Established high-performing culture and morale through transparent communication, regular enablement sessions, and clear performance frameworks. Drive continuous improvement mindset across 5+ managers and 25+ team members, resulting in industry-leading retention and employee satisfaction.

#### iCapital

New York/Boston

#### Vice President, Platform Operations & Implementation

04/2021 - 12/2023

Led customer success and implementation operations across Commercial, Mid-Market, and Enterprise segments for 50+ person global delivery organization. Implemented comprehensive operating model with direct management responsibility for Mid-Market and SMB segment teams. Coordinated across Product, Engineering, and Sales to drive seamless onboarding and adoption.

- **Operating Model Implementation:** Stepped into 50+ person global delivery team and implemented comprehensive operating model with direct management of Mid-Market and SMB segment operations. Achieved 60% efficiency improvement (394→629 annual production hours per employee) while increasing output 20% despite 25% workforce reduction in managed segment.
- **Client Implementation Leadership:** Led execution of 75+ white-label client implementations, each varying in scope and complexity. Timeline management ranging from 6 weeks to 12+ months for enterprise-level clients requiring multi-stakeholder coordination and complex system integrations. Achieved 50% time-to-value improvement for SMB/Mid-Market segment (3 months → 6 weeks).

## Experience

- **Manager Development & Team Building:** Designed comprehensive training and onboarding strategy that facilitated a 100% increase in department headcount within 12 months while maintaining quality standards. Reduced new employee onboarding duration by 85%, from 3 months to 4 weeks, through systematic process development. Coached managers on performance management and enablement.
- **Strategic Automation & Cost Optimization:** Led a strategic automation initiative resulting in \$500K annual cost savings by developing technology to reduce manual intervention through cross-departmental coordination with Product, Data, and Engineering teams.

DebtX

Boston, MA

Director, Operations & Implementation

01/2017 - 03/2021

Led operations and implementation for the enterprise division of a fintech platform serving Fortune 100 clients, government agencies, and institutional investors in the secondary loan sale and distressed asset markets.

- **Scalable Framework Development:** Built scalable framework, utilizing technology and partnerships, enabling billions in transactions in 4-6 week cycles nationwide. Exceeded industry standards by 60%.
- **Enterprise Program Management:** Managed end-to-end operations for enterprise asset portfolio transactions ranging from \$75MM to \$5B, including complex settlements, data analysis, and multi-party coordination, ensuring accurate processing and compliance.
- **Operations Leadership:** Delivered over \$1B in client outcomes across 200+ implementation projects, managing 250,000 assets with \$45B total portfolio value while maintaining operational excellence across diverse enterprise requirements.
- **Cross-Functional Execution:** Oversaw project execution with budgets ranging from \$10K to \$100K while generating revenue from \$400K to \$10MM+ per engagement through systematic coordination across legal, compliance, and technical teams.

Associate Director, Operations & Implementation

01/2013 - 12/2016

- **Complex Program Execution:** Led due diligence operations for the largest enterprise asset transaction in company history (30,000 assets, \$5B) for the US Department of Housing and Urban Development, requiring multi-stakeholder coordination and government compliance protocols.
- **Operational Innovation:** Created software automating due diligence for \$5B portfolio, cutting costs by \$75K annually and boosting operations by 50% through process optimization.
- **Team Building:** Built a 100-person team with 24-hour onboarding time. Efficiency reduced overhead costs by 30% demonstrating the ability to scale operations rapidly while maintaining quality standards.

Additional Roles at DebtX:

01/2008 - 12/2012

- Vice President, Client Delivery & Operations (2011-2012) | Assistant Vice President, Due Diligence & Technology Solutions (2010-2011) | Project Manager, Due Diligence & Technology Solutions (2008-2010)

## Education

New England Law | Boston

Boston, MA

Juris Doctor (J.D.)

- Legal training provides an analytical framework for risk assessment and complex analysis within regulated environments and enterprise clients.

Providence College

Providence, RI

B.A. | Division I Field Hockey - Captain

- Athletic leadership experience for team-building principles, performance accountability, and high-pressure execution. Foundational skills for building cohesive, high-performing operational teams.

## Core Competencies

Customer Success Leadership • Multi-Layer Organization Building • Onboarding Operations • Cross-Functional GTM Alignment • Metrics-Driven Performance Management • Platform & SaaS Implementation • Process Design & Scalability • Manager Coaching & Development