

KATIE KELLY

Customer Success & Platform Operations Executive | Scaling Post-Sales Fintech Organizations

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Executive Summary

Customer Success and Platform Operations executive specializing in building and scaling post-sales organizations for growth-stage fintech. 15+ years designing organizational structures, implementing operational frameworks, and leading teams that drive customer outcomes across implementation, onboarding, and strategic account management. Built multi-layer organization from 3 to 25+ professionals (5+ managers) in 12 months while doubling implementation throughput to 500+. Prevented \$20M+ in revenue churn through systematic account rehabilitation and quality frameworks. Track record implementing operating models for 50+ person teams (60% efficiency improvement) and leading cross-functional initiatives with Sales, Product, and Engineering to enable retention and expansion.

Key Achievements

Organizational Scale & Leadership

- Built and led B2B post-sales organization from 3 to 25+ professionals (5+ managers) in 12 months, establishing multiple layers of management with scalable frameworks for hiring, coaching, and career development.
- Redesigned operating model for 50+ person global implementation organization, introducing segment-based coverage model (SMB, Mid-Market, Enterprise) that achieved 60% productivity improvement while increasing output 20% despite 25% workforce reduction.
- Built scalable delivery model that doubled annual onboarding and implementation throughput from 250 to 500+, enabling company growth while maintaining enterprise-grade quality standards.

Implementation & GTM Impact

- Led 75+ SaaS and platform implementations in regulated financial environments, managing complex compliance requirements and multi-stakeholder coordination to achieve 95%+ on-time delivery.
- Improved time-to-value by 50% for SMB and Mid-Market clients, reducing implementation timelines from 3 months to 6 weeks accelerating revenue recognition and enabling faster expansion into high-volume segments.
- Drove cross-functional automation initiative with Product, Sales, and Finance to eliminate manual fund administration processes, delivering \$500K+ in annual cost savings while improving client retention.

Strategic Account Management & Revenue Impact

- Prevented \$20M+ in revenue churn by leading rehabilitation of 3 top-5 enterprise accounts within 90 days, personally engaging senior executives to rebuild trust while implementing quality frameworks and escalation protocols that reduced enterprise escalations 20%.
- Enabled product adoption and expansion across strategic accounts through accelerated onboarding, systematic QBRs, and cross-functional coordination with Sales and Product teams.

Experience

iCapital

New York/Boston

Senior Vice President, Head of US Platform and Client Operations

01/2024 - 11/2025

Built and scaled a post-sales organization for an alternative investment platform serving as a marketplace connecting wealth managers, advisors, and asset managers with alternative investment products. Defined strategic vision and organizational structure for post-sales client operations, onboarding, professional services, and support. Owned end-to-end customer journey across SMB, Mid-Market, and Enterprise segments and designed systems and processes that reduced time-to-value while enabling 2x growth in annual throughput.

- Organization Building:** Built multi-layer post-sales organization (3→25+; 5+ managers) within 12 months. Created scalable frameworks for hiring, coaching managers and ICs, and career development that elevated team performance and increased retention.
- Professional Services Delivery:** Led implementation operations functioning as an embedded professional services organization, delivering 500+ complex platform onboardings annually with project management, resource, and profitability optimization. Cut time-to-value 75% (8w→2w) across high-volume segments by standardizing playbooks, SOPs, role-task matrices, and coverage ratios; scaled onboarding with better systems.
- Revenue Protection:** Prevented \$20M+ in revenue churn by rehabilitating 3 top-5 enterprise accounts experiencing critical quality issues, implementing mapping templates, formal QC gates, product escalation protocols, and strategic account staffing that reduced enterprise escalations 20% and restored expansion velocity.
- GTM Partnership:** Standardized Sales-to-implementation handoffs and day-0 checklists, driving 98% configuration readiness and reducing SLA by 40%. Partnered with Sales and Account Management to identify expansion opportunities that informed GTM strategy. Collaborated with Product to translate client needs into roadmap priorities, building cross-functional escalation model that resolved systemic issues faster.
- Performance Management:** Built dashboards tracking implementation volume, time-to-value, team productivity, configuration readiness, and SLA performance. Used data to identify bottlenecks, optimize processes, and forecast capacity for executive reporting.
- Strategic Account Planning:** Defined multi-quarter account roadmaps for enterprise clients, aligning internal resources with customer milestones and conducting regular executive business reviews to ensure continued adoption and expansion. Defined long-term roadmap for post-sales operations including organizational structure, segmentation, and technology investments.
- Support Operations:** Managed bifurcated support model handling 25K+ annual tickets across platform issues and data integrity, ensuring technical resolution and client relationships during high-complexity incidents.

Experience

iCapital	New York/Boston
Vice President, Operations & Implementation	04/2021 - 12/2023
Stepped into 50+ person global implementation organization experiencing scaling challenges. Assessed organizational gaps, designed comprehensive operating model with clear segment ownership, and implemented efficiency framework across SMB, Mid-Market, and Enterprise segments. Took direct management responsibility for Mid-Market and SMB operations, partnering across Product, Engineering, and Sales to drive strategic improvements.	

- **PS Operations & Efficiency:** Redesigned operating model for 50+ person global implementation team achieving 60% efficiency improvement (394→629 annual production hours per employee) while increasing output 20% despite 25% workforce reduction.
- **Implementation:** Managed project delivery across 75+ platform implementations spanning 6 weeks to 12+ months; improved SMB and Mid-Market time-to-value 50% (3mo→6w) through scalable onboarding playbooks.
- **Team Building:** Designed comprehensive training and onboarding strategy that facilitated 100% increase in department headcount within 12 months while maintaining quality standards. Reduced new employee onboarding 85% (3mo→4w) through systematic process development.
- **Strategic Automation:** Led 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 organization 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 a scalable execution framework enabling multi-billion-dollar transactions in 4–6-week cycles; outperformed industry standards by 60%.
- **Enterprise Program Management:** Ran end-to-end enterprise programs (\$75MM–\$5B) with strict compliance, coordinating legal, technical, and operational workstreams to ensure on-time onboarding.
- **Operations Leadership:** Delivered \$1B+ client outcomes across 200+ implementations; managed 250,000 assets and \$45B in portfolio value with measurable productivity and quality controls.
- **Cross-Functional Execution:** Governed budgets (\$10K–\$100K) and revenue (\$400K–\$10MM+), forecasting capacity and outcomes to inform GTM planning across legal, compliance, and technical teams.

Associate Director, Operations & Implementation	01/2013 - 12/2016
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- **Team Building:** Built a 100-person team with 24-hour onboarding time. Cut overhead by 30% while maintaining compliance and delivery standards.
- **Complex Program Management:** 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.
- **Automation:** Built software automating due diligence for \$5B portfolio, cutting costs by \$75K annually and boosting operations by 50% through process optimization.

Additional Roles at DebtX:

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

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.	

Areas of Expertise

Customer Success Leadership • B2B Post-Sales Operations • Strategic Organizational Design • Revenue Protection • Professional Services Delivery • Team Building & Leadership • Platform & SaaS Implementation • Onboarding & Adoption Operations • GTM Strategy and Alignment • Performance Management • Process Optimization • Manager Development • Enterprise Client Management • Fintech & Regulated Industries