

KATIE KELLY

Customer Success & Professional Services Executive | Post-Sales Operations & Scale

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Executive Summary

Customer Success and Professional Services executive specializing in scaling post-sales operations for growth-stage SaaS platforms. 15+ years leading implementation and customer success organizations, applying professional services methodologies to deliver complex, project-based onboarding at scale. Built multi-layer CS organization from 3 to 25+ professionals (5+ managers) in 12 months while doubling annual implementations to 500+. Cut time-to-value 75% (8w→2w) through systematic playbooks and tooling. Track record implementing operating models for 50+ person teams (60% efficiency improvement) and leading cross-functional initiatives (\$500K cost savings through strategic automation). Partner across Sales, Account Management, and Product to align GTM strategy, forecast outcomes, and drive retention and expansion.

Key Achievements

CS & Professional Services Scale

- Built and led customer success and professional services 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 client coverage model (SMB, Mid-market, Enterprise) achieving 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.

Retention & Expansion

- Saved \$20M+ in at-risk ARR by rehabilitating 3 top-5 enterprise clients within 90 days through systematic quality improvements, escalation protocols, and strategic account alignment.
- Tracked client adoption showing measurable improvement in onboarding speed, quality, and self-sufficiency as clients expanded platform usage, proving successful adoption.

Experience

iCapital

New York/Boston

Senior Vice President, Customer Success and Operations

01/2024 - 11/2025

Built and scaled customer success and professional services operations for alternative investment fintech platform. Defined strategic vision and organizational structure for post-sales implementation and client services. 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.

- CS Organization Building:** Built a multi-layer customer success 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 onboarding 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.
- Operational Scale:** Applied PS methodologies (project scoping, milestone tracking, resource allocation, risk management) to ensure consistent delivery across SMB, Mid-Market, and Enterprise segments.
- Retention & Account Growth:** Saved \$20M+ in at-risk ARR by rehabilitating 3 top-5 enterprise clients 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 & Alignment:** Standardized Presales to CS handoffs and day-0 checklists, driving 98% configuration readiness and reducing SLA by 40%. Partnered with Sales and Account Management on pipeline insights, expansion signals, and customer feedback that informed GTM strategy. Collaborated with Product to translate customer needs into roadmap priorities, building cross-functional escalation model that resolved systemic issues faster.
- Metrics & Performance Management:** Built dashboards tracking implementation volume, time-to-value, team productivity, readiness, and SLA performance. Used data to identify bottlenecks, optimize onboarding processes, and forecast capacity needs for executive reporting.
- Strategic Planning & Organizational Design:** Defined long-term roadmap for CS operations including organizational structure, coverage models, and technology investments. Designed bifurcated team structure (implementation vs. support) that enabled specialization and scale.
- Customer Experience & Support Operations:** Ran bifurcated support model managing 25K+ annual tickets across platform issues and data integrity, ensuring technical resolution and strong 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 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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- **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.
- **Team Building:** Stood up a 100-person team with 24-hour onboarding time. Cut overhead by 30% while maintaining compliance and delivery standards.

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 • Professional Services Delivery • Multi-Layer Organization Building • Platform & SaaS Implementation • Onboarding & Adoption Operations • Strategic Planning • Cross-Functional GTM Alignment • Metrics-Driven Performance Management • Process Design & Scalability • Manager Coaching & Development • Organizational Design