

# 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. Built multi-layer organization from 3 to 25+ professionals (5+ managers) in 12 months while doubling annual implementations to 500+. Cut time-to-value by 75% (8 weeks to 2 weeks) 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, Product, Finance, and CX to align GTM strategy, forecast outcomes, and drive retention and expansion.

## Key Achievements

### Organizational Leadership & Scale

- Built customer success organization from 3 to 25+ professionals (5+ managers) in 12 months following promotion, establishing multiple layers of management and clear performance frameworks.
- Designed and implemented operating model for 50+ person global implementation organization with direct management of Mid-Market and Scaled segments, achieving 60% efficiency improvement while increasing output 20% despite 25% workforce reduction.
- Doubled annual onboarding and implementation throughput from 250 to 500+ while maintaining enterprise-grade delivery standards and client satisfaction.

### Customer Success & GTM Impact

- Led 75+ SaaS and platform implementations in regulated financial environments, achieving 95%+ on-time delivery.
- Improved time-to-value by 50% by reducing implementation timelines from 3 months to 6 weeks for Scaled and Mid-Market clients.
- Partnered with Product, Sales, and Finance to drive automation initiatives producing \$500K+ in annual cost savings and improved client adoption rates.

## 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 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.
- Activation & Onboarding:** Owned onboarding across Scaled, Commercial, and Enterprise; delivered 500+ annual implementations with consistent time-to-value and quality. Cut time-to-value 75% (8w→2w) by standardizing playbooks, SOPs, role-task matrices, and coverage ratios; scaled onboarding with better tooling and systems.
- Operational Scale:** Doubled annual product onboardings from 250 to 500+ while maintaining enterprise-grade delivery across complex regulatory and integration requirements.
- Support Operations & Client Experience:** Oversee bifurcated support operations managing 25,000+ annual tickets across front-end platform issues and back-end data integrity. Built specialized teams with technical troubleshooting expertise and strong client communication protocols, maintaining SLAs while preserving client relationships during high-complexity incidents.
- GTM Partnership & Alignment:** Standardized Presales to CS handoffs and day-0 checklists, driving 98% configuration readiness by kickoff and reducing kickoff to configuration SLA by 40%. Partner closely with Sales and Account Management on growth and expansion. Collaborate with Product and CX to design workflows and feedback loops that drive adoption, retention, and expansion.
- Metrics & Performance Management:** Instrumented 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.
- 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 implementation 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.

## Experience

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- **Client Implementation:** Led 75+ platform implementations spanning 6 weeks to 12+ months; improved SMB/Mid-Market time-to-value 50% (3mo→6w) through scalable onboarding playbooks.
- **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:** 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 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

- **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:

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

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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.

## Skills

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