KATIE KELLY

Customer Success & Implementation Executive | Growth-Stage Operations & Scale

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Executive Summary

Customer Success and Implementation executive specializing in scaling customer operations for growth-stage fintech and SaaS platforms. Architect organizational structures, build and scale teams, and develop operational frameworks that enable hypergrowth while maintaining delivery excellence. 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, and CX to align GTM strategy, forecast outcomes, and drive retention and expansion.

Key Achievements

Organizational Leadership & Scale

- Built and led customer success organization from 3 to 25+ professionals (5+ managers) in 12 months following promotion, establishing multiple layers of management and clear performance frameworks.
- Redesigned operating model and organizational structure for 50+ person global implementation organization, introducing segment-based coverage model and systematic efficiency framework. Direct management of Mid-Market and SMB segments achieved 60% productivity improvement while increasing output 20% despite 25% workforce reduction, proving the model's scalability.
- Built scalable delivery model that doubled annual onboarding and implementation throughput from 250 to 500+, enabling company growth while maintaining enterprise-grade quality standards and client satisfaction across segments.

Customer Success & GTM Impact

- Led 75+ SaaS and platform implementations in regulated financial environments, managing complex compliance requirements, integration challenges, and multi-party stakeholder coordination to achieve 95%+ on-time delivery.
- Improved time-to-value by 50%, reducing implementation timelines from 3 months to 6 weeks for SMB and Mid-Market clients, accelerating revenue recognition and enabling faster expansion into high-volume segments.
- Led 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 and competitive positioning.

Experience

iCapital	New York/Boston
Senior Vice President, Operations and Client Delivery	01/2024 - 11/2025

Promoted to architect and scale customer success operations for alternative investment fintech platform. Define strategic vision and organizational structure for post-sale activation and implementation. Own end-to-end customer journey across SMB, Mid-Market, and Enterprise segments, designing systems and processes that reduce 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.
- **Activation & Onboarding:** Owned onboarding across SMB, Mid-Market, 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 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 and reducing SLA by 40%. Partner with Sales and Account Management on pipeline insights, expansion signals, and customer feedback that inform company GTM strategy. Collaborate with Product to translate customer needs into roadmap priorities.
- **Metrics & Performance Management:** Built dashboards tracking implementation volume, time-to-value, team productivity, configuration readiness, and SLA performance. Use data to identify bottlenecks, optimize onboarding processes, and forecast capacity needs. Report operational performance and segment trends to senior leadership.
- **Strategic Planning & Organizational Design:** Define long-term roadmap for CS operations, including organizational structure, segment coverage models, and technology investments. Collaborate with executive leadership to align CS strategy with company growth objectives. Design bifurcated team structure (implementation vs. support) that enabled specialization and scale while maintaining quality standards.

Experience

iCapital
New York/Boston

Vice President, Platform Operations & Implementation
04/2021 - 12/2023

Redesigned operations for 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.

- **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.

- **Client Implementation:** Led 75+ platform implementations spanning 6 weeks to 12+ months; improved SMB and 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:

- 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 · 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