

# NATALIE FINNEGAN, CSM

## CUSTOMER SUCCESS & OPERATIONS

nfinneg2@gmail.com · [linkedin.com/in/nataliefinnegan](https://www.linkedin.com/in/nataliefinnegan)

Accomplished leader with **10+** years of experience in operational management/processes and **6+** years in Customer Success. Contributing keen insights to delivery of client needs, market demands, and competitive trends. Adept at analyzing relevant information and adjusting work procedures to achieve a proven track record of the highest standard of excellence in customer service and processes. Motivated by learning & passionate about overcoming organizational blocks to maximize results.

### CORE COMPETENCIES

- Performance Improvement & Problem Solving
- Project & Requirements Management
- Communication & Organization
- Team Building & Leadership
- Data Analysis & Strategy
- Operations Manager & Process Improvement
- Workflow Organization & Business Requirements
- Business Operations & Product Development
- Standard Operating Procedures & Process Improvement

### PROFESSIONAL EXPERIENCE

#### Forager

September 2020-Present

##### Director, Customer Operations, North America

Building an online Marketplace to tackle the complexities of cross-border shipping with technology based solutions.

Overseeing a team of 14 that supports all of our North American business

- Collaborated with Sales to established a client journey to clearly define a path to customer success
- Built out and structured entire operations department including team organization, career pathing, best practices, internal SLAs, and training/development
- Monitor, track, and report on client health to identify churn risk and develop an action plan when necessary
- Developing external facing training materials highlighting new features and illustrating how to navigate our platform to drive adoption and increase customer loyalty
- Partner closely with product to help prioritize the roadmap & understand feature success, while being a steward for the business in helping operations understand product impact

#### FLEXPORT

May 2019 - September 2020

##### Manager, Client Solutions, Mid-Market & Enterprise

Freight forwarding organization that built a cloud-based data analytics platform to provide visibility & transparency to the freight forwarding process. Managed and supported a team of 5 operations associates, developed and expanded operational skill sets through account, people, and project management.

- Developed & executed account management content & training for managers on client journey, share of wallet, and quarterly business reviews for our LA office.
- Fully owned the growth and retention of my assigned book of business totaling **\$20mm** in annual revenue, partnered with sales to develop & execute strategic account plan
- Dived deep into clients' business goals and objectives & leveraged insights gained to consult and use a solutions based selling approach to improve operations & efficiencies
- Combined efforts with Account Solutions & Procurement teams and successfully executed contract renewals for **6** of my clients, **2** of which agreed to **multi-year deals**.
- Chosen to help lead a task force of 5 to collaborate with cross-functional teams, creating content to establish the quarterly business review **gold standard** for the organization
- Improved the LA office culture by rolling out **4** new initiatives relating to increased feedback and recognition.

#### CoLane

May 2018 - April 2019

##### Senior Operations Manager

Seed stage startup with a focus on building out AI for the logistics industry using natural language learning

- Optimized workflow & upgraded strategies for operations by collaborating with the core leadership team on developing standard operating procedures, acceptance testing, and process improvements.

- Served as the liaison between product and operations helping to triage submitted ideas/bugs
- Increased monthly revenue from **\$75k** to **\$250k** in **6** months via targeted marketing analysis; maximized customer service KPI's by managing **5+** customer accounts to ensure on-time pickup and on-time delivery.
- Initiated pilot onboarding program for new & executive hires, creating a reliable framework of support by creating in-depth overviews, focus guides covering data sources and critical organizational logistics, and industry-specific information regarding operations.

#### Coyote Logistics

**June 2010 - May 2018**

#### IT Project Manager, Software Development

**Dec. 2017 - May 2018**

- Maximized production goals and improved profitability by providing hands-on support to IT projects and incoming work orders by strategizing ways to implement data driven plans for effective pricing opportunities.
- Gathered and wrote business requirements for projects that drove IT solutions to deliver business goals
- Enabled specification feature/business launches and initiatives by proactively managing data driven variances to project scope, identify potential crises, and develop contingency plans.
- Established effective working relationships cross functionally & with internal stakeholders define key objectives and implement change management strategies.

#### Operations Manager, Enterprise

**Aug. 2014 -**

**Dec. 2017**

- Generated over **\$50M** in annual revenue by retaining and growing one of our **top 3** enterprise accounts. In addition, built relationships with multiple lines of business to increase communications and understanding of supply chain operations.
- Exceeded 2017 contracted sales goals by **22%** through focused salesforce training, inventory planning, forecasting business requirements, and support of existing international trade partnerships.
- Ensured rigorous performance measures met or exceeded, such as **92%** on-time delivery for designated day and **97.5%** for designated appointment, by leading a 10-person support team to execute quarterly freight forwarding business targets and cost saving initiatives.

#### Operations Team Lead

**March 2012 - Aug. 2014**

#### Operations Coordinator

**June 2010 - March 2012**

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## EDUCATION

Bachelor of Arts, Communications & Business Administration | University of Illinois at Urbana-Champaign  
LAMBDA PI ETA, Communicators Honor Society

## CERTIFICATIONS

**May 2020 - Current**

Certified Scrum Master, Scrum Alliance