PATRICK S. FERDIG

Customer Success Executive| SaaS | AI-Powered CX Transformation | Growth Architect

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EXECUTIVE SUMMARY

Customer-obsessed executive with 25+ years leading and scaling global post-sale organizations across SaaS, AI, MarTech, and digital platforms. Recognized for building AI-enabled customer lifecycle engines that consistently deliver NRR 120%+, GRR 95%+, and multimillion-dollar expansion results. Proven operator with deep expertise across Customer Success, Support, Professional Services, Implementation, Customer Experience, and Partner Success. Strong track record unifying cross-functional teams, improving operational discipline, and enabling predictable, customer-led growth. Trusted by CEOs, boards, and investors to design customer strategies that directly improve revenue velocity, valuation, and long-term retention.

KEY METRICS SNAPSHOT

- **Retention:** +36 pt NRR; GRR up to 95%
- **Growth:** $14M+ ARR expansion; $12.7M advocacy-driven ARR
- **Churn:** -42% via predictive health & automation
- **Scale:** 12 to 1,200 FTEs worldwide, 3% attrition
- **Customer Experience:** CSAT +48%; NPS +61 pts; CES -26%
- **Efficiency:** Cost-to-serve -23%; MTTR -48%; 68% ticket deflection
- **Professional Services:** $12.5M+ revenue; 90% utilization; 95% SLA adherence

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SKILLS | CORE COMPETENCIES

Customer Lifecycle & Value Leadership (Onboarding → Adoption → Value Realization → Expansion → Advocacy)

- Revenue Retention & Expansion / Growth
- Global Customer Success & Services Leadership
- Cross-Functional GTM & Executive Alignment
- Voice of the Customer (VoC)
- Digital & AI-Enabled Customer Success
- Transformation & Change Leadership
- Professional Services & Support Leadership

- Post-Sale P&L Ownership
- Operating Model Design & Organizational Scale
- Customer Experience Strategy
- Data-Driven Customer Strategy
- Risk & Escalation Management
- M&A Integration
- Executive Stakeholder Management

PROFESSIONAL EXPERIENCE

Founder & Fractional Chief Customer Officer

Renewal Rocket — University Place, WA   2018 – Present

Provide executive post-sale transformation for SaaS, AI, MarTech, and Security organizations.

- Designed and launched AI-enabled telemetry, lifecycle automation, and predictive health scoring that identified risk 4–6 months early, reduced churn 30–40%+, and delivered 95% renewal forecast accuracy across $500M+ ARR.
- Built scalable CS playbooks, digital adoption journeys, and in-app education programs that accelerated time-to-value 28%, increased product adoption, and delivered 110%+ NRR with 100%+ YoY ARR and upsell growth.
- Unified post-sale functions (CS, Support, Onboarding, PS) into an integrated revenue engine, preventing 70%+ of potential escalations and enabling consistent, measurable ROI delivery for enterprise accounts.

- Monetized services—including onboarding, integrations, training, and premium support tiers—generating $3M+ annual PS revenue at 45%+ margins while raising CSAT by 17 points.
- Built and operationalized cross-functional CS/PS delivery models aligning solution architects, CSMs, TAMs, and support engineers to improve account outcomes and enterprise value realization.
- Implemented AI-assisted support routing, tiered service models, and automated deflection pathways that reduced MTTR 42%, improved SLA adherence, and deflected 65% of low-complexity tickets.
- Instituted metrics-based coaching, structured enablement, and career pathways that increased team productivity 50%+ and reduced voluntary attrition to under 10%.
- Designed outcome-based success plans and quarterly executive business reviews that aligned customer KPIs with measurable value, reducing surprise churn and accelerating expansion cycles.
- Sponsored 50+ strategic enterprise accounts, directly driving $9M+ ARR expansion and sustaining NRR above 120%.
- Built board-ready dashboards linking customer value realization with revenue forecasting, NRR performance, margin improvement, and investor valuation metrics.
- Partnered with CEOs, CFOs, and boards to tie CS outcomes to corporate strategy, P&L impact, valuation models, and acquisition readiness.
- Established SOC2, ISO 27001, HIPAA, and GDPR compliance frameworks that reduced audit preparation time by 35% and strengthened enterprise trust.
- Served as guest speaker at Investor Advisory Panels and SaaS Growth Consortiums presenting industry benchmarks on CS economics and AI-driven enhancements adopted by 12 venture portfolios.

Functional Scope: Customer Success, Support, Professional Services, TAM, Partner Success, CSM Ops, Onboarding, Enablement, Revenue Operations.

Chief Customer Officer
411 Locals — Las Vegas, NV (Remote)   2020 – 2024

Owned post-sale P&L for $68M revenue across Customer Success, Support, Professional Services, and Partner Success for 20,000 SMB customers.

- Designed AI-enabled telemetry and predictive health scoring models that surfaced risk 90–180 days early, reduced churn and escalations 27–40%+, and delivered 96% renewal forecasting accuracy.
- Improved NRR by 26 points (reaching 104%) and GRR by 19 points (reaching 92%) while reducing cost-to-retain by 17% through systematic lifecycle optimization and automation.
- Built scalable onboarding, adoption, and renewal playbooks—including in-app education and digital pathways—that drove 110%+ NRR, 100%+ YoY upsell growth, and $12.7M ARR expansion.
- Implemented outcome-based success plans and executive business reviews tied to measurable customer KPIs, securing multi-year renewals and accelerating expansion cycles.
- Unified Success, Support, Onboarding, and Professional Services into an integrated post-sale revenue engine, preventing 70%+ of potential escalations and improving enterprise retention.
- Designed and monetized services packages—including onboarding, integrations, training, and premium support tiers—accelerating time-to-value 28%, reducing go-live timelines 25%, and generating $3M+ high-margin PS revenue.
- Built cross-functional CS/PS operating models aligning solution architects, CSMs, TAMs, and support engineers to deliver measurable customer ROI and increase long-term expansion.
- Modernized global support operations with tiered models, AI-assisted routing, and real-time customer dashboards, reducing MTTR 42%, improving SLA adherence to 97%, cutting backlog 33%, and raising CSAT by 17 points.
- Launched premium support tiers with dedicated TAMs and compliance guarantees, driving enterprise stickiness and generating significant recurring service revenue.
- Instituted metrics-based coaching, structured enablement, and career pathways that increased team productivity 50% and reduced voluntary attrition below 10%.
- Built a unified Voice of Customer engine with 14-day product feedback loops, producing 120+ customer case studies and $2.1M in advocacy-driven ARR.
- Partnered with executives and boards to connect CS outcomes to P&L, valuation, and acquisition readiness, delivering board-grade retention dashboards and LTV:CAC forecasting models.

Vice President, Customer Success

Nintex — Bellevue, WA 2014 – 2018

Led global Customer Success, Professional Services, Support, CS Operations, and Customer Experience teams: 275 FTE across NA, EMEA, APAC. Post-sale owner for 30,000 customers including 62% of the Fortune 50.

- Maintained 92%+ retention through a major license-to-SaaS migration while exceeding renewal targets at 125% and generating $14.8M+ ARR expansion.
- Increased NRR by 32 points and LTV by 21% through segmentation strategy, lifecycle playbooks, predictive analytics, and automated customer journeys that reduced cost-to-serve 23%.
- Built an enterprise-scale "Success Intelligence Hub" integrating telemetry, CSQL logic, adoption insights, and AI health scoring across 30K accounts—driving $14.8M expansion ARR in Year 2.
- Introduced ROI realization frameworks and outcome-based executive reviews, securing multi-year renewals and expanding enterprise ARR by $9M+.
- Developed a proactive renewal playbook that reduced annual churn from 12% to under 5% across global enterprise SaaS customers.
- Scaled the Customer Success organization from 12 to 275 globally, cutting onboarding ramp time 40% and creating a Success Operations function that enabled 10× customer coverage without increasing headcount.
- Established and scaled a $12.5M+ Professional Services practice, integrating four acquired organizations and managing 1,000+ implementations annually with ≥95% on-time delivery.
- Increased PS utilization from 62% to 78% while maintaining 45–47% gross margin through standardized scoping, optimized pricing, and real-time resource dashboards.
- Redesigned global Support with follow-the-sun coverage, AI routing, and structured triage processes—improving SLA adherence from 82% to 97%, reducing backlog 31%, and lowering MTTR 38%.
- Launched scaled adoption programs, certification frameworks, and self-service enablement that quadrupled product engagement and raised CSAT by 19 points.
- Served as Executive Sponsor for the top 50 enterprise accounts representing $160M+ ARR, driving retention, alignment, and long-term expansion commitments.
- Unified operations, delivery models, tooling, and culture across four acquisitions, creating a consistent global customer experience and post-sale operating rhythm.

Functional Scope: CSM, Support, Professional Services, Education, TAM, PS Delivery, CS Ops, Renewals Forecasting.

EDUCATION

Business Administration   Beacom School of Business   University of South Dakota

TECHNICAL & OPERATIONAL SKILLS

Platforms: Gainsight, ChurnZero, Planhat, Salesforce, Intercom, Zendesk, HubSpot, Looker, Snowflake, Tableau, Jira
Analytics: Predictive Churn Modeling, AI Health Scoring, Forecast Automation, ROI Dashboards
Compliance: SOC2, ISO 27001, HIPAA, GDPR, PCI, Risk Management, BCP/DR
Operations: Support & Incident Management, SLA Governance, Digital CS, Enablement, PS Operations
Leadership: OKRs, Balanced Scorecard, Org Design, Global Team Scaling, Outsourced Operations, Executive Coaching

LEADERSHIP DNA

Builder & Operator | Data-Driven Strategist | Customer-First & Empathetic Leader | Change Architect | Growth Catalyst