

SAM POND
MARRITZ

四海為家

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Professional Summary

Financial services Account Manager with friendly but tenacious attitude for delivering a seamless client experience and improving organizational efficiency internally.

I believe in constantly refining internal processes and finding ways to make things work better. I have taken a similar approach to my career, in which I have seized opportunities for self-improvement.

I am looking for part-time work in Seattle while I attend night school in Renton. I have excellent attention to detail and am familiar with virtually all aspects of office management.

Skills

Corporate taxation and accounting	Zendesk
Microsoft Excel	Revenue retention
Salesforce	Escalation support

inDinero, March 2015 – May 2018

Account Manager, April 2016 – May 2018

- Account manager and escalation point for SaaS technology start-up.
- Manage \$2.5 million in annual recurring revenue
- Support product implementation process
- Own portfolio of 200 clients and manage engagement contract lifecycle.
- Responsible for timely delivery of financial statements and tax returns.
- Scope client accounts, quote pricing, negotiate contract terms, process contract amendments, and terminate engagements.

Enterprise Client Advocate, January 2016 – April 2016

- First point of contact for Enterprise level accounts
- Responsible for all product and tax-related client communication
- Liaison between tax and accounting departments
- Identified and tracked bugs using Jira
- Worked with software team to implement product solutions

Client Advocate, March 2015 – January 2016

- First hiring class of customer service team
- Built out knowledge base and documentation to define own role
- Routed all inbound communication and was first point of contact for 500 clients
- Developed training materials and interviewed candidates

English Teacher and Cultural Ambassador, August 2014 to March 2015

- Identified Taipei as market for early childhood liberal arts education

- Paired English language education with American history political science
- Independently contracted with families and billed at quarterly rate
- Topics ranged from the US Civil Rights movement and climate change to American sports and political climate.

Portland State University, March 2011 to June 2013

Development Officer

- Developed relationships with alumni and past donors
- Maintained monthly donation quota
- Served as brand ambassador for the university

Education

Bachelor of Arts: Political Science and Chinese Language

Portland State University - Portland, OR