

Kelsey Stephenson

Customer Success | Strategic Partnerships | Scalable Account Growth

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Dynamic, strategic, and achievement-driven customer success leader with 9+ years of experience in account management, client retention, and sales across fast-paced industries. Proven ability to build meaningful business relationships, drive account expansion, and accelerate growth through data-driven strategies and scalable processes. Recognized for exceptional interpersonal skills, cross-functional leadership, and operational rigor that fuels long-term, sustainable growth. Highly coachable and growth-oriented, with a strong commitment to continuous learning, mentorship, and professional excellence.

Areas of Expertise

Professional Skills Client Success & Retention Strategy | Cross-Functional Leadership | Stakeholder Engagement | B2B Partnerships & Strategic Account Management | SaaS Adoption & Enablement | GTM Strategy | Data-Driven Growth Planning | Consultative Sales & Upselling

Technical Skills HubSpot | PipeDrive | Google Workspace | Google Sheets | Notion | Tableau | Canva | Task Management Tools

Professional Experience

Director of Customer Success | AdSync Media | Remote | May 2024 to June 2025

AdSync is a performance publishing company specializing in high-volume lead generation for the insurance industry, with a focus on Medicare Advantage. Promoted from Head of Customer Success to Director, I led strategic growth and retention across a diverse portfolio of insurance buyers and performance marketing partners.

- Owned and grew strategic relationships with top insurance firms and performance marketing agencies; led account strategy, pricing conversations, and client-facing communications virtually and at industry events.
- Built a performance tracking system to identify optimization opportunities, guide pricing decisions, and improve RPC, driving incremental revenue growth through data-backed buyer strategy.
- Partnered with Ops and Tech teams to resolve campaign inefficiencies and advise on API integrations, routing, and pacing improvements that supported account scalability.
- Developed a tier-based segmentation model (Premium+, Premium, Optimizable, etc.) and red/yellow/green KPI dashboards to prioritize high-impact accounts and enable targeted re-engagements.
- Led cross-functional alignment with Sales, Call Ops, and Media Buying (10 team members), steering growth planning, account pacing, and delivery strategy.
- Launched a weekly scorecard system to shift team focus from reactive support to proactive, data-driven growth.

Head of Legal & Insurance Programs | Palo Media Group | Remote | Aug 2023 to May 2024

Palo is a performance marketing network and client acquisition platform focused on legal, insurance, and health verticals. Hired to lead demand-side growth and rebuild foundational strategy during a critical operational transition.

- Launched and scaled high-volume verticals including Medicare, SSDI, Mass Tort, and ACA by aligning strategic buyers with vetted publishers to ensure margin stability and long-term scalability.
- Scaled Medicare vertical to \$30K/weekly revenue by aligning publisher incentives with client volume and CPA targets.
- Built launch frameworks focused on CPA tracking, compliance, and sourcing strategies to support scalable program growth, client retention, and expansion.
- Led weekly cross-functional strategy meetings across media, affiliate, ops, and leadership teams, using data insights and buyer updates to optimize vertical growth and campaign stability.
- Owned strategic client relationships across law firms, insurance agencies, performance marketing networks, and lead generation companies, driving alignment between buyer goals and supply-side execution.

Account Manager | StudentCrowd | Remote | Jan 2021 to June 2023

StudentCrowd is the UK's leading platform for student accommodation reviews and market insights, supporting universities and PBSA providers.

- Managed enterprise accounts in the student accommodation sector, driving £ 900 K+ in ARR and achieving a 92% annual renewal rate.
- Upsold 300+ monthly ad placements while driving adoption of StudentCrowd's SaaS insights and MarTech tools to expand platform value and client spend.
- Advised clients using student sentiment and performance trends to optimize campaign strategy, booking flow, and market positioning.
- Led webinars, review strategy sessions, and onboarding workshops to drive client education, platform engagement, and long-term success.

Sales & Client Experience Manager | Bridging Gaps | Cape Town, South Africa | February 2017 to March 2020

Bridging Gaps is a purpose-driven education startup offering customized internships in Cape Town focused on personal and professional growth, aligned with ethical tourism initiatives.

- Owned the full customer journey for 25+ international students annually from initial sales consultations to in-country onboarding, mentorship, and wrap-up.
- Designed bespoke internship placements across diverse sectors, including nonprofits, healthcare, tech, creative, and more, by aligning student goals with each host organization's mission and needs.
- Maintained a 9.5/10 star rating on GoOverseas and similar platforms by delivering high-touch, personalized service throughout the experience.
- Drove high conversion rates through relationship-based discovery calls, customizing each journey to the intern's academic and personal development goals.
- Cultivated long-term partnerships with 50+ Cape Town-based organizations, serving as the operational bridge between intern success and community impact.

Sales Associate | African Impact | Cape Town, South Africa | September 2015 to January 2017

African Impact is a social enterprise offering volunteer and educational programs across Africa, with a mission to deliver meaningful, ethical, and community-aligned experiences.

- Led sales for the East Africa region, consulting with students and universities to match candidates with high-impact learning programs aligned to regional and participant goals.
- Contributed to go-to-market strategy by helping design and position volunteer programs across diverse focus areas, including healthcare, education, and conservation.
- Supported inbound sales growth through values-driven communication and personalized guidance across international audiences.
- Partnered with global marketing and operations teams to enhance program visibility, participant experience, and long-term engagement.

Education & Certificates

- AAS in Business Communications, Santa Monica College, 2020
- Inbound Sales Certification, HubSpot Academy, 2021
- Digital Marketing Certificate, Google, 2020
- Critical Thinking in Business Seminar, Ndala Live, 2023
- Strengths Coaching & Mentorship, Clifton Strengths, 2018 - 2020