

Daniel Lopez

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PROFESSIONAL SUMMARY

SaaS Director of Customer Success and Technical Product Advisor with 5 years of experience scaling value in startup environments. Dedicated to maximizing enterprise client retention and product adoption for complex platforms. I architect successful client journeys by merging deep Product Expertise and Technical Advisory with core CSM functions (Onboarding, Relationship Management, and Retention). I act as the primary Subject Matter Expert, driving sales enablement, leading complex API and MCP server Integrations, and pioneering AI Automation workflows that directly translate into high-value business outcomes. Proven ability to collaborate cross-functionally to drive product improvement and ensure a unified client experience.

LANGUAGES

- English (Native Proficiency)
- Spanish (Native Proficiency)

TECHNICAL SKILLS & PLATFORM EXPERTISE

- **Client Success and Analytics:** ChurnZero, HubSpot CRM, QuickSight, Advanced Microsoft Excel
- **Cross-Functional:** Strong Communication & Presentation, Customer Advocacy, Start-Up Knowledge, G-Suite, MS Office
- **Technical Integration:** Postman API Manager (Testing/Management), AWS, Google Cloud Workspace, Github, JIRA
- **AI and Automation:** n8n AI Workflow Automation, RAG Systems, MCP Server Integration, Gemini, Cursor, VS Code

PROFESSIONAL EXPERIENCE

Scoot, Inc. - Director of Customer Success, Dallas, TX (Remote) Jan 2023 - Current

- Drove 165%+ Quarter-over-Quarter Net Revenue Retention (NRR) growth across the enterprise portfolio by serving as a strategic Product Expert and cultivating win/win solutions with C-Suite executives of key accounts.
- Pioneered the design and execution of AI Automation workflows, including complex voice agents, RAG systems, and administrative agents, directly translating into sophisticated business strategies for clients.
- Spearheaded the technical integration of ChurnZero and other systems (OrgChart Hub, database, RevRec) into the existing CRM, aligning technology infrastructure with client business goals and accelerating revenue growth.
- Act as the primary Technical Advisor and Subject Matter Expert (SME), managing and utilizing client-facing APIs and Model Context Protocol (MCP) servers; routinely train and guide customer development teams on leveraging these tools for optimal implementation.
- Managed the entire customer account lifecycle and Support function while closely collaborating with Product and Engineering teams on QA testing, ticket creation (JIRA), and driving product roadmap creation using synthesized customer feedback.
- Devised and implemented a dynamic Client Health Score index to precisely gauge performance and facilitate proactive, strategic account growth and retention initiatives, also establishing key Customer Case Study initiatives.

Scoot, Inc. - Customer Success Manager, Dallas, TX (Remote) Jan 2021 - Jan 2023

- Spearheaded the onboarding and technical implementation for a portfolio of 50+ accounts, functioning as the primary product expert to ensure rapid adoption, continuous engagement, and resolution of technical integration issues.
- Drove revenue retention and growth by proactively identifying and securing upsell opportunities and managing essential performance metrics, including designing and overseeing customer scoring systems to mitigate retention risks.
- Collaborated cross-functionally with Product and Engineering to efficiently resolve complex customer-related issues, serving as the Voice of the Customer to inform service improvements and the product roadmap.

Nolan Transportation Group - Carrier Sales Representative, Alpharetta, GA Sep 2020 - Jan 2021

- Drove cost-efficiency and managed risk by sourcing and negotiating optimal contracts with a dynamic network of qualified freight carriers, ensuring compliance with all regulatory standards.
- Cultivated high-value client loyalty by acting as a primary point of contact, strategically managing carrier performance and satisfaction to guarantee reliable and timely logistics delivery.
- Established and executed complex operational strategies, maintaining rigorous documentation and performance metrics to optimize the efficiency of the supply chain and guarantee service-level agreement (SLA) adherence.

EDUCATION

University of Georgia- School of Public and International Affairs, Athens, GA Aug 2016 - Dec 2019

- **Major:** Bachelor of Arts, Political Science
- **Major:** Bachelor of Arts, International Affairs
- **Extra Curricular:** Drum Captain, University of Georgia Redcoat Marching Band