SAMANTHA DOLAN

[redacted]

PROFESSIONAL PROFILE

Proven record of success in a career marked by rapid growth in responsibility, and a high focus on customer success, sales, and project management across multiple industries. Flexible team player with strong leadership skills. Skilled in numerous software platforms with desire and drive to quickly learn new platforms as needed for my role. Strong administrative, interpersonal, communication, and organizational skills. Skilled at managing competing priorities, takes ownership of work, and seeks success.

EXPERIENCE

CIRRUS INSIGHT
Enterprise Customer Success Manager/October 2021-present

- Manage renewals and upsells for existing clients from initial conversions through invoicing while consistently meeting or exceeding expansion quota by up to 140%
- Implement success plans for enterprise clients totaling over $3M in ARR such as Neuberger Berman, Pfizer, and PNC and manage them throughout entire lifecycle
- Conduct client trainings on Cirrus Insight platform while ensuring continuous adoption of product
- Develop templates for quarter business reviews, email campaigns, and kick-off presentations for Customer Success team
- Create customized training documentation for clients including admin and user guides
- Roll out new implementation materials including project plans, questionnaires, and onboarding guides
- Manage implementation projects for new and existing customers

DEPUTY
Senior Enterprise Account Manager/March 2021-October 2021
Enterprise Account Manager/May 2019-February 2021

- Managed enterprise clients such as Peloton, Dutch Bros Coffee, and McDonald's through the entire customer lifecycle with customer base totaling $2M in ARR
- Conducted quarterly business reviews with strategic clients to gather feedback and identify growth opportunities
- Consistently exceeded quarterly expansion goals by up to 130% while ensuring customer satisfaction and scalability
- Delivered product trainings and work with clients to enhance business processes with best practice recommendations
- Implemented and test configuration changes to address client needs and change requests

OVERSIGHT SYSTEMS, INC.
Client Implementation Manager/September 2018 – May 2019

- Managed multi-million-dollar client base through entire SaaS implementation process, including technical requirements and integrations
- Led day-to-day implementation project operations, including planning and facilitating all internal and external project meetings, risk mitigation, issue escalation and resolution, and status reporting
- Developed and fostered strong client relationships through day-to-day project contact, managing scope and expectations
- Conducted customer training on system use and best practice recommendations
- Perform analysis of client business processes to develop suggestions and solutions

Account Executive/October 2015 – September 2018

- Managed multiple complex projects through the entire sales cycle such as Estee Lauder, Uber, Philip Morris, and United Health Group
- Consistently met or exceeded quarterly quota by up to 169%
- Recognized as subject matter expert on the team for Oversight's various SaaS offerings for transaction monitoring
- Delivered product demonstrations and trial presentations to C-level executives for myself and other team members
- Developed and refined outlines/presentations for introductory calls, demonstrations, and business value presentations

Client Success Manager/February 2015 – October 2015

- Monitored all phases of the customer lifecycle with customer base totaling $3M in ARR and acted as an escalation point for all issues
- Defined key metrics to increase net retention of customers, and worked to develop a highly referenceable customer base with clients such as Google, Kimberly Clark, General Electric, and Aetna
- Conducted client training sessions, trial results presentations for the sales team, and project kick-off calls
- Ensured customer satisfaction with Oversight's SaaS solutions with 94% client retention rate

Demand Generation Associate/ March 2014 – February 2015

- Navigated structure of Fortune 1000 companies to identify appropriate contacts for Oversight's sales team
- Conducted initial prospect meetings to gather information, answer product questions, and share company value
- Established relationships with key prospects while coordinating involvement of sales team
- Consistently met or exceeded monthly quota by up to 150%

HOWARD CAPITAL MANAGEMENT, INC.
Trading and Operations Associate/ July 2013 – February 2014

- Traded equities, mutual funds, and bonds on multiple platforms including TD Ameritrade, Folio, Pershing, and Jackson National
- Established, funded, and rebalanced appropriate model portfolios
- Implemented 401(k) allocations based on clients' risk tolerance

- Assisted in setting up new accounts and maintaining financial advisor relationships

PHILIPS HEALTHCARE
Financial Planning and Cost Analysis Intern/ May 2012 – August 2012

- Collected and organized vendor bank information in SAP
- Organized equipment warranty information in Microsoft Access database
- Conducted weekly internal audits in Accounts Payable department
- Organized and presented quarterly financial figures using Microsoft Excel and PowerPoint

EDUCATION

Lewis University

August 2009 - December 2012

Bachelor of Science,

Economics/Finance Minor

CERTIFICATIONS

Google Ads Search Certification

Credential Link

Google Ads Display Certification

Credential Link

SKILLS

Customer Success
Account Management
Sales
Project Management
Client Training
Relationship Building
Team Leadership
Improving Efficiency
Resource Management
Time Management

TECHNICAL EXPERIENCE

SaaS
Salesforce
Gainsight
Microsoft Office Suite
Google Suite
Trello
Asana
Jira
Confluence
User Acceptance Testing