Nicholas Geoffroy

7209379277 | geoffron@comcast.net | Garden Grove, California

SUMMARY

Results-driven Customer Success Manager with 10 years of SaaS experience excelling in client retention, upselling, and driving adoption. Proven track record in managing strategic business reviews, negotiating renewals, and delivering superior customer service. Expertise in analyzing data to implement process changes, and skilled in providing client satisfaction and increasing engagement. Adept at working cross-functionally and leveraging extensive industry knowledge to ensure client success and increase revenue. Seeking to leverage a decade of experience in the role of a Customer Success Manager.

WORK EXPERIENCE

Logicbroker Shelton, CT

Client Success Manager *Jun 2022 - Nov 2023*

- Managed a portfolio of 12 clients, driving a recurring Annual Recurring Revenue (ARR) of $4 million.
- Negotiated 10 enterprise client renewals, achieving 6 price increases and maintaining 100% client retention.
- Identified and capitalized on upsell opportunities, contributing to a significant increase in upsell revenue.
- Directed comprehensive strategic business reviews, orchestrating presentations and content delivery, both in-person and via teleconference based on client preference.
- Developed personalized quarterly newsletters for each client within the portfolio, driving a measurable increase in client engagement.
- Collaborated cross-functionally to contribute to the development of new features

ClosingCorp San Diego, CA

Account Manager *Aug 2016 - Jun 2022*

- Cultivated and fostered strong relationships with 100+ clients in a software as a service environment, resulting in increased client satisfaction and retention.
- Successfully negotiated price increases with 65 lenders, resulting in improved revenue and a retention rate exceeding expectations.
- Proactively drove client adoption and played a key role in successful client roll-out projects, resulting in enhanced client satisfaction and adoption rates.
- Provided tailored reporting solutions to lender clients, meeting individual client needs and enhancing satisfaction levels.
- Took requirements for product enhancement requests, championed requests with product team, monitored improvements, and presented final enhancements to clients.

Lead Client Support Specialist *Aug 2015 - Aug 2016*

- Led client support team to achieve 95% SLA compliance, resulting in effectively managed escalating call and email volumes.
- Developed and implemented an escalation procedure for case management.
- Served as primary escalation point and after-hours support contact.
- Updated the internal Claims Procedure to comply with requirements of TRID regulations.
- Conducted interviews of applicant for the role of Client Support Specialist and trained new team members.

BOFI FEDERAL BANK La Jolla, CA

Loan Servicing Representative *Jan 2013 - Jan 2015*

- Designed and executed a project to scrub all loans in the servicing portfolio to assure compliance with regulatory flood insurance requirements and to eliminate gaps in flood insurance coverage, substantially reducing the bank's exposure to risk.
- Developed process maps and procedures for the maintenance of homeowners and flood insurance information.

BEXIL AMERICAN MORTGAGE San Diego, CA
Mortgage Operations Specialist *Jan 2012 - Jan 2013*

- Researched, wrote, and published over two dozen chapters for the Policies and Procedures Manual, Underwriting Standards Manual, and Encompass User Manual. This included material for the employee and the broker website.
- Developed and delivered trainings covering such topics as Rate Lock and Pricing, Changed Circumstances and Adverse Actions.

PULTE MORTGAGE, LLC. Englewood, CO
Business Process Specialist *Jan 2004 - Jan 2011*

- Spearheaded 2 year project that improved Ernst and Young audit results from over 100 findings to 3 by coordinating with IT business partners to develop better system controls and operational business partners to implement processes ensuring improved quality of loan files.
- Reduced number of internal audit findings found to be non-compliant from hundreds to less than 30 by supporting business operations through analysis of key performance indicators and trends.
- Targeted process improvement projects towards most efficient cure for audit exceptions by determining root causes of audit exceptions; developed process maps and eliminated future exceptions through development of action plans.
- Trained operations teams on new processes to ensure improved accuracy and consistency of quality loan files improving internal audit compliance from 70% to 90% over 3 year period.
- Presented and reviewed results with upper management ensuring that findings were delivered in clear and concise manner.

EDUCATION

University of Colorado | Boulder, CO
BA, Economics

SKILLS

- Zoom
- Customer Success Strategy
- Microsoft Office Suite
- Client Lifecycle Management
- Client Onboarding
- Customer Relationship Management (CRM)
- Upselling and Cross-selling
- Client Engagement
- Cross-Functional Collaboration
- Microsoft Teams
- Churn Analysis and Reduction
- Client Communication
- Data-Driven Decision Making
- Client Retention
- Client Success Analytics
- Process Improvement Implementation
- Hubspot
- Google Apps
- Strategic Business Reviews
- Renewal Negotiation
- Customer Success Management
- SaaS Industry Knowledge
- Intermediate Portuguese
- JIRA
- GoToMeeting
- Client Satisfaction Metrics
- Salesforce
- Key Account Management
- Client Upselling Strategies