

LISA MARION

marion.lisa@gmail.com • linkedin.com/in/lisamarion • (905) 330-1982

- 10+ years in account management/Customer Success & relationship building roles
 - Business diploma from Sheridan College
 - Leadership & mentorship experience
 - Proven success in developing strategic relationships in organizations leading to high retention rates, high adoption, and expansion opportunities
 - Member in good standing of Women in CS
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Relevant Professional Experience

EcoOnline - Remote

Senior Customer Success Manager (SaaS)

Nov. 2022 - Present

- Leads & mentors a small but mighty light touch/tech-touch account team
- Owns a high ARR portfolio of EcoOnline clients (mid market to enterprise), specializing in new logo onboarding & adoption - directly resulting in multi-year renewal terms at favorable uplift rates
- Works with C-level clients to build rapport and ensure EcoOnline products are considered irreplaceable
- Designs & improves internal CS processes & procedures using automation & other tools to streamline and optimize experiences for clients while reducing internal workload
- Monitors, develops, and implements team best practices resulting in increased retention & revenue, decreased churn
- CEO-appointed liaison between marketing, product marketing & CS/Rev-Ops teams to help streamline client messaging, resulting in better relationships, transfer of information and reduction in workload for CSMs
- Liaises with multiple stakeholders within the company (product, engineering, finance, legal, Executive level, etc.) to produce positive client outcomes regularly

Igloo Software - Remote

Customer Success Manager (SaaS)

Sep. 2021 - Oct. 2022

- Owned a high ARR portfolio of Igloo's customers, mainly mid-sized with some enterprise, \$3M+ ARR
- 100% client retention rate for renewals over tenure, zero churn and zero downsell over tenure
- Pulse by Gainsight Customer Success Manager Levels I & II certifications
- Developed and maintained strategic business relationships while building fierce customer & brand loyalty resulting in consistent customer references for Igloo services
- Drove adoption, value realization and ROI throughout my portfolio and built a trusted advisor relationship to facilitate successful renewals and identify expansion pipeline
- Has experience having tough conversations with clients as well as an ability to say "No" and "Not yet" when appropriate
- Worked closely with key cross-functional teams, including sales, engineering, and implementation to advocate for improving/enhancing existing capabilities where appropriate
- Experience working on internal processes & procedures including DEI policy creation, creating SOPs, employee engagement committees and more

Q4, Inc. – Remote

Customer Success Manager (SaaS)

Feb. 2020 – Sep. 2021

- Directly managed a portfolio of 90+ SaaS accounts with a focus on proactive and strategic relationship management, and driving up-selling/cross-selling revenue opportunities for SMB to large-cap publicly traded companies
- Advised clients on Investor Relations best-practices for web and events, and provides training on product usage
- Acted as the client's champion within the company, ensuring that all feedback is collected & shared internally to help improve product
- Built new quality relationships and repaired damaged ones, resulting in increased spend, trust and continuing spend
- Collaborated with other departments/management to ensure internal and client-specific needs were met or exceeded

The Hamilton Spectator (Metroland Media) – Hamilton, ON

Multimedia Account Executive

Jun. 2019 – Feb. 2020

- Brought in new client accounts via cold-calling and referrals for advertising sales
- Built new quality relationships and repaired damaged ones, resulting in increased ad spend, trust and continuing spend
- Built comprehensive communications plans with clients to help them achieve their advertising goals
- Used Salesforce CRM and other proprietary technologies to keep Metroland customer databases updated and to provide excellent client care
- Created a new Small Business special advertising section by taking initiative, presenting the idea to management and executing it successfully

Shopify, Inc. – Remote

Merchant Success Manager (SaaS)

Feb. 2018 – Jun. 2019

- Worked remotely on busy live phone and chat lines via computer providing top-notch technical support, customer service and business coaching to merchants ranging in size from SMB's to large enterprises resulting in increased usage and adoption
- Developed a following of customers that asked for Lisa by name, as their preferred guru (normal support is random)
- Achieved the highest customer satisfaction levels in the team (98%)

H&P Properties Company Ltd. – Toronto, ON

Entrepreneur/Business Owner

Oct. 2012 – Feb. 2018

- Responsible for all day-to-day management of a small business including staff, bookkeeping, customer service, sales
- Promoted the company via marketing strategies and media interviews & articles
- Successfully won outside funding and small business competitions (Starter Company, Ignite Capital, etc.)
- Created & maintained company processes & procedures, implemented training and staff on-boardings
- Managed client & tenant accounts via telephone, in-person & email interactions
- Brought in new client accounts via cold-calling & referrals, signing them up for company rental services

Airbnb Inc – Remote

Host Success Manager (SaaS)

Sep. 2011 – Oct. 2012

- Began by delivering exceptional customer service in a high-volume email & phone environment (50+ tickets/day)
- Over 95% satisfaction rate as measured by customer feedback
- Advanced to specialized departments handling high value hosts (Host Success/account management) and payments/financial issues with minimal supervision
- Managed day to day relationships with 70+ High Value Hosts and identified growth and improvement opportunities which resulted in increased bookings for hosts, which in turn increased revenues for the company

Technology

Experience with:

Salesforce	Catalyst (CS CRM)	Confluence/Jira
MS Office Suite	Google Workspace	Mac OS
Calendly	Slack	Zendesk
Salesloft		