

Jordan Lee

Customer Success Manager

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PROFESSIONAL SUMMARY

Customer Success Manager with 7 years owning enterprise onboarding, retention, renewal, and expansion outcomes in SaaS. Strong at building executive relationships, driving adoption plans, and turning customer health signals into concrete actions that protect and grow recurring revenue.

EXPERIENCE

Senior Customer Success Manager

02/2022 - Present, Chicago, IL

WorkflowOS

- Managed a \$3.4M ARR book of business with 94% gross retention and 121% net revenue retention across mid-market and enterprise accounts
- Reduced onboarding time-to-value by 28% through role-based launch plans, milestone tracking, and stronger implementation handoff
- Ran executive business reviews and adoption programs that influenced more than \$640K in expansion revenue over 12 months

Customer Success Lead

07/2018 - 01/2022, Remote

InsightLoop

- Built adoption playbooks and admin enablement content that increased weekly active usage by 17% across priority customer cohorts
- Partnered with product on voice-of-customer themes and escalation patterns that shaped roadmap decisions and support documentation
- Improved renewal predictability and reduced preventable churn by 22% through earlier risk identification and save-plan execution

EDUCATION

B.A. in Communication

05/2018

University of California, Santa Barbara

- Focus on client communication, stakeholder management, and organizational behavior

SKILLS

Renewals, Expansion, Onboarding, QBRs, Salesforce, Gainsight, Health scoring, success plans, churn reduction, stakeholder management, product adoption, voice of customer.

CERTIFICATIONS & HIGHLIGHTS

- Gainsight NXT Associate Admin, 2024
- Webinar series owner for admin education, increasing feature adoption by 19%

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