
WILLIAM FRANK

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PROFESSIONAL SUMMARY

Driven Client Success Manager with a long-cultivated and well-rounded set of client support skills that include relationship management, implementation, training and onboarding, Product development, Q/C and proofreading. Dedicated to building rapport and maintaining loyal customer relationships through entire service lifecycle to drive multi-year retention and uncover upsell opportunities. Offering deep technical acumen with strong communication skills to help customers embrace company processes and full range of product offerings.

SKILLS

◆ Implementation/Onboarding ◆ Relationship Development ◆ Project Management (Basecamp, Asana, Kanban) ◆ Process Improvement ◆ Project Organization ◆ MS Office ◆ Salesforce ◆ InfusionSoft ◆ Gainsight ◆ Google Analytics ◆ Tigerpaw ◆ Slack ◆ Camtasia (Video Production) ◆ Working Knowledge of HTML, Photoshop

WORK HISTORY

Implementation Specialist, 06/2020 to Present

Compliance Group -- Greenlawn, NY

- Implementation Coach for a Compliance SaaS company, managing a portfolio of 150+ clients across a range of industries that include the Healthcare sector, MSPs, SaaS organizations, Nonprofits and more.
- Responsible for account management and customer success, educating clients on HIPAA, OSHA, SOC2 regulations while onboarding our web-based Compliance tracking solution.
- Consistent performance against monthly KPI targets for Implementations completed and Customer satisfaction with top NPS scores.
- Assistance with documentation for Knowledge Base articles (software and training documentation) and Marketing Newsletters.
- Provide training for new employees on company platforms and process.

Senior Customer Success Manager, 07/2012 to 03/2020

Event Journal, Inc. – Jericho, NY

- Relationship management of a portfolio of 30-40 strategic accounts that raise \$4M+ in charitable donations a year via our site and services.
- Improved customer retention rate so that 91% of client roster is renewals and 73% of those renewals are clients with at least a minimum of 4 years of business with the company.
- Generated incremental revenue from clients by upselling add-ons and upgrading accounts to higher tiers.

- Developed new workflow processes and updated current policies (including onboarding map, Quality Control and proofing processes, collaboration, client approvals) to streamline delivery channels and maximize resources of small start-up staff.
- Created client Training programs which increased product adoption and improved both clients' ROI and customer satisfaction survey scores (**client testimonials available at www.williamfrankev.com**)
- Central resource and client advocate for Out-of-Scope projects and Customization requests, providing cross-functional, interdepartmental support for service improvements and add-ons.

Client Services and Product Development Specialist, 01/2004 to 08/2011

Video Monitoring Services – New York, NY

Customer Success Manager

- Complete Customer Success Management in the media monitoring space for ten Advertising Agencies and their Brand clients across multiple verticals (Telecom, QSR, Pharma {OTC and DTC}, CPG, etc.) to ensure customer satisfaction, optimize adoption, deliver product support, and foster long-term business relationships with an eye toward new revenue streams and renewals.
- Integrated client base into new corporate Sales structure after former company was purchased, helping transition clients into new business model and software services, assuring business continuity while also selling additional range of products.
- Conducted personalized Training and Onboarding with a focus on best practices to ensure clients were getting full value from our services, while promoting opportunities for upsell and add-on features to enhance our services and expedite successful outcomes.
- Collaborated with the Sales team as-needed to help close new accounts, conducting web-based and on-site Product Demonstrations to secure year-over-year revenue growth.
- Frontline technical support working with Operations and IT to resolve site errors and outages, as well as issues with Production deliveries.

Product Development:

- Key resource in the overhaul and development of our new flagship Media Monitoring software, as the Sales Advocate and Client Experience expert guiding the SDLC (Software Development Life Cycle), writing use cases, providing Q/A testing for new features and supporting the deployment teams with testing and approval in the move from Staging to the Live environment.
- Partnered with companies such as Nielsen, SQAD and Media Monitors to help develop systems to ingest measurement data (occurrence and expenditures) to complement our Ad, Print and Digital Media monitoring system to expand and power the analytics available to our clients.

EDUCATION

Master of Arts: English

State University of New York At Stony Brook - Stony Brook, NY

Bachelor of Arts: English

State University of New York At Stony Brook - Stony Brook, NY

AWARDS

Phi Beta Kappa Honor Society, Cum Laude, Dean's List (Every Semester for Four Years)

CERTIFICATIONS

CompTIA A+ Certification