

Mike Lee

C h i e f C u s t o m e r O f f i c e r

PROFESSIONAL PROFILE

Considered the Customer Success Alchemist with over 26 years of diverse experience focused on delivering value and leveraging customer evolution to ensure long term relationships while driving retention and expansion of recurring revenue. Experience building successful global performance driven teams in Financial Services, Payments, SaaS, and Government verticals.

WORK EXPERIENCE

Head of Customer Success & Post Sales

Public Input | Durham, NC | 2021 – Present

Senior Executive reporting directly to the CEO/Co-Founder, accountable for the holistic oversight of the post-sales division encompassing Customer Success Management, Onboarding, Training, Customer Support, Community Engagement, Renewals Management, and Professional Services. Spearheaded a remarkable 150% expansion of the team while elevating Net Revenue Retention (NRR) from an impressive 93% to an exceptional 120%.

Key accomplishments include:

- Orchestrated the development and implementation of cutting-edge Customer Success (CS) protocols, comprising comprehensive Playbooks, Health Scores, Business Reviews, a pioneering New Onboarding Program, and refined training class cadences. These strategic initiatives resulted in a remarkable surge in Customer Satisfaction (CSAT) scores from 71% to an exceptional 93% within a span of two quarters.
- Drove the successful integration of a state-of-the-art Digital CS program tailored specifically for the Digital Touch segment, employing automation technologies such as Pendo and Intercom at a scalable level. This groundbreaking implementation achieved an impressive 20% surge in CSAT ratings for the digital customer base.
- Pioneered the establishment of the organization's inaugural Customer Advisory Board, fostering invaluable collaborations with esteemed stakeholders and leveraging their insights to drive notable product enhancements. Additionally, the creation of a dynamic public engagement management community further augmented the company's market presence and influence.
- Spearheaded an executive team deep dive into Diversity, Equity, and Inclusion (DEI) matters, prioritizing internal concerns and implementing comprehensive training initiatives. This proactive approach resulted in the implementation of a monthly company-wide diversity training, leading to a remarkable 52-point increase in Employee Net Promoter Score (eNPS).

Director of CS Strategy, Operations, and Strategic Accounts

Spredly | Durham, NC | 2019 – 2021

Leading a Customer Success team and strategy to grow and manage the full lifecycle of the customer experience. Scaled team to manage growing customer base, including creating and growing international CS Teams in LATAM, UK, and APAC.

- Guided the creation and Management of Customer Health Scores to manage healthy and at-risk customers proactively and consistently for long term success across Spredly.
- Using new processes and playbooks, the team increased NRR from 87% to 101% within a year.
- Actively engaging in the Customer Success communities (LinkedIn, conferences, etc.), publishing two articles focusing on establishing and refining a customer success organization, Diversity Equity and Inclusion, and various best practices in Customer Success.
- Established enterprise and digital customer success team to manage the renewals for \$32M in recurring revenue, thus transforming the culture to focus on retention and



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EDUCATION

Doctor | Business Administration

University of North Carolina at Charlotte

Masters | Business Administration

University of Massachusetts at Amherst

B.S. | Computer Science

Alabama A&M University

CERTIFICATIONS

PMP – 2014, 2018, 2022

CCSM - 2021

Apttus Billing Management – 2020

Apttus CPQ Level 2 - 2020

Apttus CLM Level 1 – 2019

Apttus CPQ Level 1 - 2019

Amazon Cloud Practitioner - 2019

TBM Executive - 2019

Recognized TBMA - 2018

Certified Scrum Product Owner - 2017

Certified Scrum Master - 2016

ITIL Expert - 2015

Professional Scrum Master - 2014

Lean Six Sigma Greenbelt - 2014

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EXPERTISE

IT Business Strategy & Transformation

Strategic Consulting

Technology Business Management (TBM)

Global Team Mgmt. & Execution

Customer Success Strategy

Process Design & Development

Agile Transformation

ITIL Maturation and Measurement

Project Planning & Execution

Lean Development Methodology

Industry Awards

APPEALIE SaaS CS Leader Award

CSC 23 in 2023 Designee

2022 Top 100 CS Strategist

Awarded Future of SaaS MVP 2021

Customer Success Festival – Featured Speaker

Gainsight Pulse - Featured Panel Speaker

Future of SaaS – Metrics Summit Speaker

Future of SaaS - CS Festival Speaker

Gain Grow Retain - Host

OnDeck CS Founding Fellow

WORK EXPERIENCE *CONTINUED*

Lead Sr. Strategic Customer Success Manager (IC)

Conga | Durham, NC | 2016 – 2019

Led strategic planning and product adoption for customers over \$1.7mm in Conga CPQ, CLM, BM, and IWA products. Lead product demo sessions and became a trusted partner for each customer assigned. Regarded as the subject matter expert in KPI and road mapping processes. Lead internal training for CS organization in various success topics.

- Top performer for increasing challenging customers from red accounts to Green.
- Renewal rates for all assigned customers topped 90%
- Successfully increased adoption on 87% of customers within 3 months.
- Developed partner relationships to provide broader support for red customers.
- Developed CSM workshops for providing insight into product functionality. Workshops were announced at the company-wide event.
- Developed the first Apttus CS customer journey for CSM's to guide customers through maturity.

Lead Enterprise Customer Success Advisor (IC)

Apptio | Morrisville, NC | 2013 – 2016

Provide strategic advisory services for Fortune 500 customers in adoption of Apptio Products focused on the TBM Discipline. Selected customers include Nasdaq, Viacom, Duke University, University of Florida, Johns Hopkins, University of Vermont, KPMG, and Tapestry.

- Successfully leading adoption of Apptio products for major Fortune 500 companies, focusing on Senior Leadership relationships to develop strategic goals.
- Portfolio ACV increased 34% over one year period.
- Influenced adoption, rollout, and training for Duke University Health System increasing usage 410%.
- Working with Senior IT Leaders at Duke University to define allocation strategies and flexible models to gain insights into the business value of IT, resulting in identifying \$8MM in overspend on duplicate contracts.
- Guided KPMG's Senior Financial staff through modeling of international and other business unit spending into one cost center, ultimately saving the company \$6MM yearly.
- Successfully built Internal CS Frameworks to engage customers in Organizational Change Management and Customer Experience/Journey Maps.
- Created TBM Conference session content and agenda focused on Higher Education customers.
- Led account Risk Management reviews to develop save plans for "at risk" renewals.

ADDITIONAL EXPERIENCE

Manager, Customer Success

Signature Consulting Group | Durham, NC | 2010 – 2013

Manager Customer Engagement – Global Data SaaS Platform
Credit Suisse | Morrisville, NC | 2006 – 2010

Lead, Production Applications Engineering
Motricity | Durham, NC | 2002 – 2006

More can be viewed on LinkedIn: [linkedin.com/in/-mikelee/](https://www.linkedin.com/in/-mikelee/)