

# PATRICK DANIELS

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## SENIOR CUSTOMER SUCCESS PROFESSIONAL

Talented customer success professional with over 20 years of award-winning experience in a variety of high-tech company settings. Exceptional motivator embodying a fun-loving and contagious work style with a proven ability to raise NPS scores, increase client retention and create company-wide enthusiasm for world class customer success. Areas of expertise include:

- Account Management
- Service Delivery
- Customer Support
- Project Management
- Escalation Management
- People Management
- Team Development
- Metrics & Trend Analysis
- Process Improvement
- Partner Management
- Customer Experience
- Customer Lifecycle Development
- Sales Forecasting
- Strategic Planning
- Knowledge Management

## CAREER HISTORY

**BigID** - Austin, Texas

**January 2021 – Current**

### ***Senior CSM & Operations Advisor***

Hired to help re-architect BigID's Customer Success team and play an individual contributor role to 15 customer accounts. Responsible for overall account health, support renewals, account penetration and client satisfaction.

- Currently achieving 100% account retention in 2021.
- Named BigID's top BigExchange community content contributor, responsible for 5 of the top 10 most viewed articles.
- Designed and published BigID's self-service customer onboarding strategy.
- Designed and published BigID's customer lifecycle advisor which guides customers through their BigID journey.
- Created BigID's data assessment survey which CSM's send to customers for the purpose of prioritizing client data objectives.

**Onit, Inc.** - Austin, Texas

**June 2019 – July 2020**

### ***Director of Customer Success***

Responsible for planning, building and rolling out Onit's very first Customer Success team.

- Led a team of 4 Customer Success Managers assigned to client engagements surpassing \$20M in annual recurring revenue.
- Achieved 94% client retention in 2019, the highest to date.
- Raised Onit's Net Promoter Survey (NPS) score by 10 points, a 73% increase compared to 2019.
- Tracked, monitored and presented weekly Customer Success metrics to Onit's executive leadership team.
- Published a company-wide Customer Success dashboard aligning organizational awareness & participation with Customer Success goals.
- Responsible for Onit's adoption of Smartsheet as a project collaboration tool to monitor and manage strategic client initiatives.

**Oracle Corporation** - Austin, Texas

**November 2016 – May 2019**

### ***Manager of Customer Success, Fusion SaaS applications***

Played a key role as a founding team member hired to architect and implement Oracle's very first Customer Success Hub.

- Managed a team of 15 Customer Success Managers assigned to client engagements surpassing \$30M in annual recurring revenue.
- Achieved 75% renewal conclude rate in Q2 2017 which was the highest of all Oracle SaaS product lines.
- Led the team responsible for the highest number of incidents received/resolved as well as the most customer on-boarding presentations and knowledge base articles submitted from Q4 2016 through Q2 2017.
- Published a series of Customer Care Help articles that received the most views in Oracle's entire NA Customer Success portal.
- Recipient of Oracle Customer Services Pacesetter Award for Q2 FY18 and Q4 FY18.

**SailPoint** - Austin, Texas

**March 2014 - October 2016**

**Senior Customer Success Manager**

Assigned to SailPoint's strategic customer engagements including Bank of America, Exxon Mobile, Humana, Progressive Insurance and other top tier accounts. Responsible for overall account health, support renewals, account penetration and client satisfaction.

- Achieved \$30M+ in renewed support/services agreements.
- Managed the business relationship between SailPoint and assigned accounts; responsible for overall client satisfaction.
- Provided consulting on the use of SailPoint's identity and access management software solutions and services.
- Monitored accounts for change in product usage, personnel, project goals, financial conditions, competitor involvement and other areas that could impact client satisfaction and renewal of SailPoint's products and services.
- Recipient of SailPoint Star Award in July 2016 for going above and beyond the call of duty on key projects outside of core role.

**Oracle Corporation** - Austin, Texas

**August 2008 - March 2014**

**Service Delivery Manager**

Managed billable engagements for Oracle's Advanced Customer Support Services. Responsible for resource management, sales forecasting, project deliverables, customer satisfaction and contract renewals for clients including Dell, Wal-Mart, Shell Oil Company and other enterprise clients.

- Managed a team of technical resources assigned to achieve contracted project deliverables.
- Attained 100% of quarterly revenue targets, in the form of delivered billable hours.
- Recipient of Oracle Customer Services Pacesetter Award for Q1 FY12.

**Sun Microsystems, Inc.** - Austin, Texas

**2005 - 2008**

**Support Account Manager**

Managed Sun Premium-Plus Support engagements for assigned client accounts including eBay, Verizon Wireless, BNSF Railway and more. Responsible for post-sales support, resource management, customer satisfaction and support contract renewal.

- Achieved \$5M+ in renewed *Premium-Plus Support* agreements.
- Managed team of technical resources assigned to each *Premium-Plus Support* customer account.

**ClearCube Technology** - Austin, Texas

**2002 - 2005**

**Federal Inside Sales Account Manager**

Assigned to ClearCube's Federal territory responsible for new business development.

- Achieved 120% of quota and consistently positioned as top performing Federal inside sales representative
- Solved complex parts/ordering issue with ClearCube's most strategic government reseller, dramatically increasing order-processing efficiency and resulting in company acceptance of a most improved business partner award.

**Vignette, Inc.** – Austin, Texas

**2000 - 2002**

**Customer Account Manager**

Managed interface between products/services teams and strategic account personnel, communicating overall account status to key stakeholders.

- Provided ongoing guidance in the areas of support, product management, sales and services, achieving 90% renewal rate of targeted support contracts in assigned book of business.
- Deployed company-wide project management initiative to track, monitor, and report on critical customer production launches, providing executive staff ability to view key customer dates in a more visual timeline format.

## EDUCATION & SKILLS

**Bachelor of Journalism**, University of Texas at Austin, 1995

**Software Skills:** Microsoft Office, Salesforce.com, Gainsight, ChurnZero, Atlassian JIRA & Confluence, SmartSheet, Evernote, Milestones Professional, Camtasia Studio, Intuit QuickBase, Oracle Service Cloud, Taleo Business Edition, Oracle Cloud Portal, Slack, Windows and MAC OS