

BRONWYN

Onboarding Specialist & Customer Success Manager

Johannesburg, South Africa

RooCruit

PROFESSIONAL SUMMARY

Seasoned Onboarding Specialist & Customer Success Manager with extensive experience leading end-to-end SaaS client implementation cycles for US-based remote software companies. Skilled in conducting client-facing onboarding calls, customizing platform workflows, driving product adoption, and delivering scalable, consistent client experiences. Technically proficient in CRM systems, automation tools, and workflow configuration, with a strong focus on client success, process improvement, and remote collaboration.

KEY SKILLS

- SaaS Implementation & Onboarding
- Customer Success & Retention Management
- CRM: Salesforce, GoHighLevel, Airtable, ClickUp
- Workflow Analysis & Process Optimization
- Strategic Account Management (B2B & B2C)
- KPI & Performance Reporting
- Digital Marketing & Campaign Execution
- Stakeholder & Client Engagement
- Remote Team Collaboration
- Conflict Resolution & Negotiation
- Public Finance & Compliance Oversight
- Operations & Project Management

PROFESSIONAL EXPERIENCE

Customer Success Manager & Onboarding Specialist

May 2024 – Present

US-Based Growth Marketing SaaS Agency

Manages the full client lifecycle for a fast-paced agency specializing in lead generation and automated growth strategies.

- **SaaS Implementation:** Leads end-to-end onboarding calls independently, guiding clients through technical setup to campaign launch.
- **Customization:** Tailors platform workflows and automated strategies to maximize measurable outcomes and scalability.
- **Retention:** Drives client loyalty and satisfaction through proactive relationship management and milestone recognition.
- **Operations:** Maintains accurate CRM documentation and account operations to flag risks and identify upsell opportunities.
- **Performance:** Monitor campaign performance ensuring alignment with client revenue goals and internal SLAs.

Strategic Partner

May 2023 – May 2024

Innovative Multi-Disciplinary Professional Services Firm

- Drafted official procurement and project documentation for high-level government-private partnership projects.
- Ensured total compliance with Public Finance Management and Treasury regulations for multi-stakeholder initiatives.
- Orchestrated alignment between key government and institutional stakeholders to ensure governance integrity.
- Reported directly to the CEO regarding compliance risk assessments and strategic performance updates.

Managing Director

August 2022 – May 2023

Digital Debt Recovery & Financial Services Firm

- Led strategic and operational oversight of a high-performance digital call center, focusing on debt recovery and cost efficiency.
- Managed a B2C insurance portfolio including life cover and value-added products (VAPS).

- Oversaw software implementation that significantly scaled revenue growth and recovery rates.
- Directed a team of 22, conducting performance reviews, coaching, and implementing quality assurance standards.

Co-Owner & Operations Manager

January 2020 – August 2022

National Logistics & Supply Chain Division

- Managed end-to-end distribution and third-party freight movement for partners in retail and manufacturing.
- Supervised heavy-load fleet operations, including route planning, vehicle maintenance, and driver performance tracking.
- Controlled operational costs and financial oversight, resulting in improved company margins and cash flow solvency.
- Maintained high retention rates with key stakeholders through consistent service reliability and effective rapport.

Founder & CEO

January 2019 – June 2024

Direct-to-Consumer (D2C) E-commerce Brand

- Developed and launched a founder-led apparel brand, managing everything from product sourcing to digital fulfillment.
- Built and optimized a conversion-focused Shopify store and managed paid marketing campaigns across Meta and Google.
- Analyzed performance metrics (CAC, Retention, ROAS) to drive sustainable business growth.

Senior Business & Legal Retentions Consultant

January 2017 – January 2019

Specialized SaaS Solutions Provider

- Led end-to-end implementation of specialized SaaS recovery systems for client agencies.
- Drove system adoption and operational efficiency, significantly improving profitability for partner firms.
- Managed client relationship strategies and implementation performance monitoring directly for the CEO.

January 2014 – January 2017

Business Development & Sales Roles

Leading South African Financial & Healthcare Institutions

Successive roles focused on B2B/B2C acquisition, broker support, and customer service excellence.

- Conducted detailed Financial Needs Analyses (FNA) to recommend tailored healthcare and insurance plans.
- Managed high-volume inbound/outbound sales environments, consistently meeting conversion and retention targets.
- Built strong broker relationships, providing strategic positioning support for competitive medical aid solutions.

EDUCATION

Bcom Law

University of South Africa (Unisa)

Property Law and Conveyancing

The South African School of Paralegal Studies

High School – National Senior Certificate (Matric)

Northcliff High School

CERTIFICATIONS

Regulatory Examination 5 (RE5)

Moonstone Education (South African FAIS Act certification for financial representatives)

LANGUAGES

Expert proficiency in written and spoken English.