

ROOCRUIT

THEO

Customer Success Manager

Johannesburg, Gauteng, South Africa

PROFESSIONAL SUMMARY

Results-driven Customer Success Manager with 5+ years of experience across SaaS, fintech, and service industries. Proven track record of building strong client relationships, driving product adoption, and collaborating cross-functionally to deliver measurable outcomes. Adept at leveraging AI-powered tools and CRM platforms including Salesforce, Jira, Intercom, and Rocketlane to streamline customer journeys and improve retention. Combines empathy with a structured, data-informed approach to exceed KPIs such as CSAT and NPS.

KEY SKILLS

- **CRM & Tools:** Salesforce, Jira, Intercom, Zendesk, Rocketlane, Salesloft
- **AI & Automation:** ChatGPT, Claude, Gemini, Perplexity (Workflow Optimization)
- **Technical Skills:** SAP S4/HANA, Power BI, ERP systems, SaaS Product Enablement
- **Success Metrics:** CSAT, NPS, NiceReply, Lead Records Management
- **Methodologies:** Agile / SDLC, Business Development, Account Growth
- **Soft Skills:** Stakeholder Management, Problem-solving, Empathy

PROFESSIONAL EXPERIENCE

Leading Safety SaaS Solutions Provider

June 2025 – Present

Client Engagement Specialist

- Facilitated in-depth product demos and feature walkthroughs, ensuring clients fully adopted new platform updates and advanced functionality to maximise ROI.
- Leveraged AI tools to automate routine customer touchpoints, reducing response times and enabling more strategic, high-value client interactions.
- Acted as the primary point of contact for a portfolio of clients, proactively identifying risk signals and driving timely interventions to maintain high retention rates.
- Collaborated with product and support teams to relay client feedback and influence the product roadmap based on real customer needs.

International Technology & Social Networking Group

Feb 2024 – June 2025

Customer Success Manager

- Managed end-to-end customer relationships for an international client base, ensuring consistent engagement, satisfaction, and long-term account growth.
- Partnered cross-functionally with product, sales, and technical support teams to resolve escalations swiftly and translate customer feedback into actionable improvements.
- Monitored and reported on key success metrics (CSAT, NPS) using NiceReply, presenting insights to leadership to inform customer experience strategy.
- Developed and executed customer onboarding plans that reduced time-to-value and increased platform adoption rates across accounts.

Human Capital & Recruitment Solutions Firm

Feb 2022 – Jan 2024

Junior Account Manager

- Managed a portfolio of client accounts, executing targeted sales and marketing campaigns that deepened client relationships and supported business development goals.

- Facilitated candidate induction processes and provided CV coaching, contributing to improved placement rates and client satisfaction.
- Maintained detailed CRM records to ensure accurate pipeline tracking and timely follow-up on all open opportunities.

Big Four Management Consulting Firm

Feb 2021 – Aug 2021

Junior Consultant

- Supported cross-functional collaboration by coordinating international executive communications and complex travel logistics, ensuring seamless stakeholder engagement.
- Improved data accessibility and reporting accuracy by reorganising and maintaining large-scale internal databases, reducing retrieval time for key business information.

International BPO & Customer Experience Provider

Feb 2020 – Feb 2021

Customer Care / Sales Agent

- Delivered exceptional technical support across telephone, email, and chat channels, achieving high first-contact resolution rates and strong customer satisfaction scores.
- Analysed customer feedback to identify recurring pain points, contributing recommendations that informed product and service enhancements.
- Handled complex billing queries with clarity and empathy, managing customer expectations and resolving disputes efficiently.
- Identified upselling opportunities during support interactions, contributing to incremental revenue growth.

Telecommunications & Outreach Services Agency

Feb 2019 – Feb 2020

Customer Care / Sales Agent

- Executed outbound cold-calling campaigns to engage prospective clients and facilitate HIPAA release form collection, consistently meeting contact and conversion targets.
- Managed client records and follow-up workflows with high accuracy, ensuring full compliance throughout the HIPAA documentation process.

Specialist Staffing & Financial Services Provider

Feb 2015 – Feb 2016

Sales Agent

- Exceeded monthly phone sales targets by conducting tailored needs analyses and recommending relevant funeral cover solutions.
- Built lasting customer relationships through consistent follow-up and personalised service, resulting in strong client retention.
- Managed lead records within a CRM system to ensure organised pipelines and efficient ongoing engagement.

EDUCATION

BCom Information Systems - University of Fort Hare

2021 – 2023

National Senior Certificate (Matric) - Shangri-La Academy

CERTIFICATIONS

- SAP S4/HANA Finance Certification (SAP Academy)
- Agile Fundamentals (Udemy)
- Power BI Pro Certificate (Pragmatic Works)