

# Jonathan M. Eber

Customer Strategy & Operations | Post-Sale CS Ops & RevOps |  
NRR Growth, Lifecycle Design, Data-Driven GTM

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📍 Framingham, Massachusetts



## SUMMARY

Customer Strategy & Operations leader with 15+ years building post-sale operating models for B2B SaaS. I combine an operator's command of CS systems and lifecycle design with a finance leader's understanding of P&L and unit economics — so CS and RevOps aren't just efficient, they're engineered to drive Net Revenue Retention. Outcomes include moving NRR from 106% to 109%, unlocking \$11M in expansion ARR, and deploying ML-driven programs that generated \$4M in incremental revenue.

## CORE COMPETENCIES

Trusted CS operations partner leading renewals, health, analytics, and AI-driven enablement across the post-sale lifecycle.

- Customer Success Operations Strategy | CS Technology Stack Ownership & Administration | Health Scoring & Lifecycle Automation | Renewal Forecasting, NRR & GRR Management | Expansion Visibility & Revenue Predictability | Salesforce, Gainsight & ChurnZero Governance | AI-Driven CS Workflows & Predictive Risk Modeling | Executive Dashboards, QBRs & Forecast Cadences | Playbooks, Enablement & Rep Accountability | Cross-Functional Partnership with RevOps, Sales Ops & Finance | Team Leadership, Analyst Development & Process Design

## EXPERIENCE

02/2023 - 01/2025

Boston, MA

Senior Director – Customer Success Operations & Data Analytics



**Duck Creek Technologies**

- Led Customer Success Operations and analytics for a 180+ person global CS and onboarding organization supporting approximately \$240M ARR, building the operating infrastructure, governance cadences, and reporting needed to improve renewal execution, lifecycle consistency, and expansion visibility.
- Owned administration and optimization of ChurnZero and Salesforce as core post-sale systems, improving data integrity, workflow adoption, lifecycle automation, and trigger-based engagement across a global customer base.
- Led development of CS Central, a Power BI executive dashboard integrated with Snowflake, creating unified visibility into health, adoption, expansion pipeline, and renewal performance — establishing the data foundation for NRR forecasting, risk prioritization, and cross-functional inspection rhythms.
- Refined health scoring, segmentation, and churn-risk models to surface renewal risk earlier and enable more proactive intervention, contributing to approximately \$8M in ARR impact.
- Partnered with CS, RevOps, Finance, and executive leadership to run forecast cadences, risk reviews, QBRs, and dashboarding tied to NRR, retention, and expansion performance.
- Standardized playbooks, inspection rhythms, and enablement programs across onboarding, adoption, renewal, and expansion motions, improving operating consistency, workflow adoption, and team productivity across 180+ team members.

## EXPERIENCE

06/2021 - 10/2022

Mountain View, CA

Senior Director - Customer Success Operations



**Udacity**

- Built the Client Success operating model for a digital-first SaaS portfolio, including health scoring, renewal forecasting, usage-triggered playbooks, and expansion workflows that drove more than \$11M in growth.
- Developed ML-driven health and predictive churn-risk models using usage, engagement, and outcome signals to trigger automated interventions, creating an estimated \$4M incremental revenue opportunity and improving capacity allocation across the CS organization.
- Integrated Gainsight, Salesforce, Tableau, and Snowflake into a unified post-sale data and reporting environment, improving visibility into GRR, NRR, churn risk, expansion pipeline, and CS productivity.
- Designed lifecycle plays across onboarding, adoption, risk, and renewal preparation, giving teams more structured motions for outreach, account reviews, and escalation management in a scaled digital CS model.
- Authored executive narratives, QBR/EBR frameworks, and enablement programs that improved consistency in customer-facing execution and internal operating discipline.

01/2017 - 10/2020

Waltham, MA

Director of Customer Success - Implementation and Operations



**ACI Worldwide**

- Built the foundational post-sale operating model for 600+ enterprise customers by selecting and implementing Gainsight for 150+ Sales and Client Success users, creating a unified customer view, standardized workflows, and shared operating processes.
- Designed health scorecards, escalation frameworks, and automated CTA triggers that replaced manual tracking and improved visibility into risk, retention, and expansion opportunities.
- Developed lifecycle playbooks, enablement programs, and workflow standards across onboarding, adoption, risk, and expansion, improving operational consistency and cross-functional adoption across Sales and Customer Success.

01/2015 - 01/2017

Waltham, MA

Director of Financial Planning & Analysis



**ACI Worldwide**

- Led the FP&A function and a team of analysts for multiple product lines, owning financial models, budgets, and scenario analyses that guided growth, investment, and resource allocation decisions.
- Ran AOP and forecast cycles in partnership with Sales, Customer Success, and Product leadership, aligning headcount, capacity, and investment plans with revenue targets and post-sale performance.
- Built renewal, expansion, and churn models that informed quota design, CS capacity planning, incentive compensation structure, and strategic resource allocation for CSM and implementation teams.
- Produced executive and Board-level reporting linking financial performance to customer health and NRR/GRR metrics, establishing the analytical foundation for later CS operations and revenue retention strategy work.

01/2007 - 01/2015

Waltham, MA

Director & Product Line Manager



**ACI Worldwide**

- Owned P&L, strategy, and roadmap for transaction and online banking products, driving ~\$115M in annual sales and collaborating with enterprise customers and internal teams to align direction, pricing, and packaging with adoption, renewal, cross-sell, and long-term account growth.

## EDUCATION

Bachelor of Arts - History

**University of Massachusetts**

## PLATFORMS, ANALYTICS & OPERATIONAL TOOLS

### ✓ **CS Platforms**

Gainsight (implementation lead), ChurnZero (system owner/admin), health scoring, CTAs, lifecycle playbooks, segmentation, automated workflows

### ✓ **Analytics & BI**

Tableau, Power BI, Excel, executive dashboards, churn and renewal forecasting, portfolio reporting, NPS/customer feedback analytics

### ✓ **AI & Predictive CS Operations**

ML-driven health scoring, predictive churn-risk models, automated interventions, tech-touch programs, usage-based triggers, lifecycle workflows embedded into CS platforms and Salesforce, plus operational analytics tied to NRR, GRR, churn, and expansion.

### ✓ **CRM & Forecasting**

Salesforce administration, renewal pipeline design, forecast cadences, expansion visibility, Clari, cross-functional inspection rhythms

### ✓ **Data & Automation**

Snowflake, product usage data, ETL processes, cross-system integrations, trigger-based workflows, digital CS programs

### ✓ **AI-Assisted Insights & Productivity**

Daily use of Perplexity, Notion, and Granola for research, insights synthesis, QBR preparation, and call summarization, plus experience leveraging AI features in tools like ChurnZero and Highspot to optimize enablement