William Gamble

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Customer Success Manager | SaaS & B2B | SMB, Mid-Market, Enterprise

Summary

Customer Success & Account Management professional with 10+ years driving revenue growth and retention in SaaS, financial services, telecommunications, and healthcare. Passionate about empowering customers through data-driven, personalized engagement, I excel at managing mixed portfolios across SMB, Mid-Market, and Enterprise segments to consistently exceed targets. I build deep partnerships, reduce churn, and unlock expansion opportunities through strategic planning and cross-functional collaboration.

Experience

Customer Success Manager (Role impacted by company restructuring)   November 2023 – February 2025
Kooth Digital Health

- Managed a diverse portfolio of 100+ SMB, Mid-Market, and Enterprise customers totaling over $4M ARR, driving full-lifecycle success from onboarding to renewal.
- Identified churn risks through proactive health score analysis; implemented targeted engagement plans, reducing churn by 25% and protecting key accounts.
- Partnered cross-functionally to deliver actionable reporting and business reviews, increasing platform adoption by 35% across Mid-Market and Enterprise segments.
- Led strategic account planning with executive stakeholders, resulting in a 40% increase in customer satisfaction and retention.
- Drove expansion initiatives that generated an additional $1.2M in revenue from upsell opportunities.

Senior Business Account Executive (Role impacted by workforce reduction)   October 2022 – March 2023
Comcast Business

- Managed end-to-end sales and account management for 60+ Mid-Market accounts in a defined territory, driving over $2M ARR in business services revenue.
- Prospected and closed new business, then led onboarding and implementation to ensure successful deployment of solutions.
- Maintained long-term relationships post-sale, identifying upsell and renewal opportunities that generated $600K in expansion revenue.
- Conducted quarterly business reviews and strategic planning sessions to drive retention and improve customer satisfaction.

Account Executive (Position eliminated during company-wide layoffs)   March 2022 – October 2022
SpotOn

- Owned full-cycle responsibility for 80+ SMB accounts across a defined territory, generating over $1.5M ARR through new business acquisition, onboarding, and long-term account management.
- Prospected, sold, and implemented payment and SaaS solutions for new customers, driving adoption and successful go-live experiences.
- Maintained ongoing relationships post-sale, leading strategic upsell and renewal conversations that resulted in 30% revenue growth.
- Partnered cross-functionally with operations and support teams to ensure smooth onboarding and long-term customer success.

Customer Success Manager   August 2020 – March 2022
Merrill Lynch

- Managed a portfolio of 50+ high-net-worth clients with a book of business totaling $7M ARR, acquiring over $3M in new assets.
- Cross-sold Bank of America banking solutions to drive $4M in additional assets, deepening client relationships and improving retention.
- Maintained consistently high Net Promoter Scores (NPS) through proactive, white-glove account management and quarterly portfolio reviews.
- Collaborated with internal partners to streamline onboarding and deliver an exceptional client experience.

Projects

Marketing Material Ordering System (Kooth Digital Health)

- Automated the ordering workflow, reducing fulfillment times by 25% and increasing campaign launch efficiency by 20%.

CRM Success Play Revamp (Kooth Digital Health)

- Revamped internal playbooks and reporting processes, boosting CRM engagement by 30% and reducing forecasting errors by 20%.

Competitor Analysis Dashboard (Kooth Digital Health)

- Developed a real-time insights dashboard that enhanced competitive analysis and drove a 15% increase in product adoption.

Engagement Day Workflow (Kooth Digital Health)

- Established a quarterly engagement model that increased event participation by 20% and deepened relationships with key stakeholders.

Presentation Deck Enhancement (Kooth Digital Health)

- Redesigned executive-level decks to emphasize clear ROI and intuitive visuals, boosting QBR engagement by 30%.

Education & Certifications

Santa Rosa Junior College   December 2024
Associate of Science in Communications & Business Administration (AS-T)

Certified Customer Success Manager (CCSM) Levels 1–5 – SuccessHACKER   (February 2025)

- Specialized in strategic onboarding, lifecycle management, and driving customer success in SaaS environments.

Microsoft Office Specialist: Excel Associate – Microsoft   (October 2024)

- Advanced proficiency in data analytics, modeling, and dashboard creation.

Google AI Essentials – Coursera   (October 2024)

- Proficient in applying AI-driven insights to enhance customer engagement and optimize product adoption.

Totango Certified Success Manager – Totango   (January 2024)

- Skilled in using customer success platforms for health scoring, playbook automation, and journey orchestration.

Jira Software Essentials – Atlassian   (November 2024)

- Experienced in agile project management, backlog prioritization, and fostering cross-functional collaboration.

Skills and Strengths

- **Relationship Management:** Building and nurturing trusted, long-term partnerships across diverse portfolios.

- **Strategic Account Planning:** Driving full-lifecycle success from onboarding through renewals, with a strong focus on retention and upsell opportunities.

- **Data-Driven Insights:** Leveraging analytics and CRM tools to monitor account health, mitigate risks, and optimize customer engagement.

- **Cross-Functional Collaboration:** Coordinating with internal teams to deliver tailored solutions and actionable reporting.

- **Consultative Approach:** Proactively identifying customer needs and driving strategic initiatives that exceed performance goals.