

William Gamble

Santa Rosa, CA | 707-364-7055 | william.tk.gamble@gmail.com | [linkedin.com/in/williamkgamble](https://www.linkedin.com/in/williamkgamble)
<https://williamkgamble.com/>

Customer Success Manager | SaaS, Data-Driven Solutions | Enterprise & DTC

Summary

I'm a Customer Success Manager with over 10 years of experience in B2B SaaS, sales, and account management. I believe genuine customer success is built on clear communication, proactive problem-solving, and meaningful relationships. I'm passionate about helping clients overcome challenges through effective onboarding, tailored training, and proactive support. I strive to turn complex customer needs into clear, actionable success plans that drive measurable outcomes.

Experience

Customer Success Manager

November 2023 – Present

Kooth Digital Health

- Manage an \$8M ARR portfolio across SMB, Mid-Market, and Enterprise segments, achieving a 15% year-over-year improvement in engagement vs. a 3% target and a 10% lift in renewals vs. a 5% target.
- Deliver comprehensive onboarding and training sessions that increase product adoption by 25% vs. a 10% goal.
- Drove over \$1M in expansion revenue from upsells and renewals vs. a \$900K target.
- Collaborate with Marketing, Product, and Data Science teams to refine processes and optimize customer workflows.

Senior Business Account Executive

October 2022 – March 2023

Comcast Business

- Managed a territory of enterprise accounts from new acquisition to post-sale relationship management, resulting in an 11% increase in retention vs. a 5% target and a 12% revenue boost vs. a 5% target.
- Developed tailored account plans and delivered strategic presentations to senior stakeholders, increasing upsell opportunities by 15% vs. a 5% target.
- Exceeded new enterprise acquisition targets by 15% vs. a 5% plan through proactive pipeline management and timely cross-functional interventions.

Account Executive

March 2022 – October 2022

SpotOn

- Handled 100+ client accounts from acquisition through renewal, maintaining a 95% renewal rate vs. an 80% target through personalized onboarding and ongoing engagement.
- Facilitated over 20 training sessions and webinars per quarter, increasing product adoption by 15% vs. a 5% target.
- Developed a strategic account communication framework that boosted upsell conversion by 20% vs. a 5% goal.

Customer Success Manager

August 2020 – March 2022

Merrill Lynch

- Oversaw a \$500M+ portfolio for 250 high-net-worth clients, achieving 98% retention vs. an 85% goal with personalized, data-driven success roadmaps.
- Strengthened executive relationships by delivering quarterly ROI reports, generating \$2M in additional assets vs. a \$1.7M target.
- Partnered with compliance and risk teams to tailor success initiatives, reducing critical issue resolution times by 25% vs. a 10% target.

Early Career Summary

December 2010 – August 2020

- **Wells Fargo:** Managed private banking for C-suite executives, consistently exceeding retention and revenue targets by 15% vs. a 5% goal.
- **AT&T:** Consistently ranked in the top 5% for B2B telecom sales, achieving 110–120% of quotas vs. a 100% plan.
- **Verizon Wireless:** Recognized as a top performer in both consumer and business segments, reaching up to 120% of monthly targets vs. a 100% goal.
- **Hilda's Coffee Shop (Co-Owner):** Revamped operations and marketing, increasing revenue by 25%.

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

- Customer Onboarding & Training:** Designing and executing personalized onboarding processes, interactive training sessions, and QBRs that accelerate time-to-value.
- Strategic Account Management:** Managing large books of business (100+ accounts) with tailored strategies to drive long-term retention, upsell, and revenue growth.
- Data-Driven Insights:** Leveraging analytics and customer feedback to pinpoint risks, refine engagement strategies, and clearly articulate ROI.
- Cross-Functional Collaboration:** Working effectively with Data Science, Marketing, and Product teams to align technical solutions with customer needs.
- Process Optimization:** Developing customized FAQs, guides, and playbooks that streamline the customer journey and improve operational efficiency.
- Relationship Building:** Serving as a trusted advisor to stakeholders at all levels, cultivating long-term, impactful partnerships.
- Technical Proficiency:** Proficient with customer success platforms (e.g., Totango, Salesforce, JIRA) and continuously expanding my analytical toolkit.
- Customer Advocacy:** Championing the voice of the customer and using feedback to drive internal improvements and product evolution.
- Project Management:** Coordinating multiple initiatives simultaneously to ensure timely delivery and continuous process enhancements.
- Change Management:** Proactively managing transitions and adapting processes to meet evolving customer needs.