

## Austin Beebe

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### Professional Summary

Client onboarding and implementation leader with **7+ years of experience** delivering complex SaaS deployments and driving early product adoption in regulated, enterprise environments. Proven at accelerating **time-to-first-value**, leading structured kickoff-to-handoff journeys, and aligning technical and executive stakeholders. Known for building scalable onboarding playbooks, improving CSAT/NPS, and partnering cross-functionally to ensure successful customer outcomes. Client onboarding and customer success leader with **7+ years of experience** delivering complex SaaS and financial-services implementations from kickoff through steady-state adoption. Proven at accelerating **time-to-first-value**, driving early feature adoption, and leading structured customer journeys across technical and non-technical stakeholders. Known for strong project management, change leadership, and building scalable onboarding playbooks that improve CSAT/NPS and enable efficient growth.

### Professional Experience

Empower (acquired Personal Capital) — Senior Manager, Client Services Operations

#### **Nov 2021 – Present**

- Led **end-to-end onboarding and implementation efforts** for complex SaaS workflows, configurations, and integrations supporting thousands of clients.
- Conducted structured kickoff calls to align on success criteria, deployment timelines, and stakeholder ownership.
- Partnered with customer IT teams, administrators, Product, and Engineering to configure, test, and launch new workflows.
- Drove **early adoption and time-to-first-value**, ensuring critical workflows were activated within the first 30–90 days.
- Acted as senior escalation point during onboarding and go-live, resolving issues that could delay launch or impact customer confidence.
- Built Salesforce dashboards tracking onboarding progress, adoption health, and handoff readiness.
- Created standardized onboarding approaches and internal playbooks to improve scalability and consistency.
- Ensured seamless handoffs to Account Management and Success teams with documented outcomes, risks, and next steps.

Personal Capital — Senior Client Operations Associate, Workflow Manager

#### **Mar 2021 – Oct 2021**

- Coordinated daily onboarding and implementation workflows for a high-volume client operations team, balancing capacity to keep deployments on track.
- Acted as a central point of coordination across advisors, operations, and support during onboarding and rollout of new client workflows.
- Identified adoption gaps and operational friction points, partnering with stakeholders to implement process and communication improvements.
- Supported training and enablement efforts to improve consistency and early adoption outcomes.

Personal Capital — Senior Client Operations Associate, Private Client Group

#### **Jul 2020 – Mar 2021**

- Delivered high-touch service to **UHNW clients**, resolving onboarding, money movement, and servicing issues within a regulated financial environment.
- Captured and communicated client feedback and recurring issues, contributing to workflow and experience improvements.

Personal Capital — Client Operations Associate

#### **Nov 2019 – Jun 2020**

- Handled daily client service requests including account servicing, documentation, and reporting.
- Mentored new hires on systems, service standards, and quality expectations.

UBS — Market Conduct Surveillance Analyst

#### **Aug 2017 – Nov 2019**

- Monitored high-volume trading activity in a regulated environment, identifying and escalating potential conduct risks.
- Partnered with technology teams to enhance monitoring tools and improve data visibility.
- Led onboarding and training for new analysts.

DV Trading — Junior Commodities Trader

**Jan 2015 – Jul 2017**

- Operated in a fast-paced, data-driven environment requiring rapid decision-making, risk management, and operational discipline.

**Key Skills & Expertise**

• Customer Care & SaaS Support Operations • Managing Managers & Team Development • SLA, CSAT, Backlog & Performance Metrics • Workflow Configuration & Integrations • Escalation Management & Customer Advocacy • Change Leadership & Process Improvement • Cross-Functional Collaboration (Product, Engineering) • Salesforce, Ticketing & Automation • Workforce Planning & Attrition Management • Technical Troubleshooting Mindset

**Education**

Iowa State University, Ames, IA - Bachelor of Science in Finance - Minor: Advertising