

Antonio Hammond

Customer Success Director, Financial Services and Insurance

📞 (201) 555-6842

✉ antonio.hammond@example.com

🌐 linkedin.com/example/antoniohammond

📍 Jersey City, NJ 07302

STRENGTHS

- ♥ **Portfolio leadership**
Quarterly inspections brought risk, adoption, forecasts, and expansion into one view. Leaders gained earlier choices on priority accounts.
- 👥 **Executive value conversations**
CFO and COO reviews connected planning outcomes with capital allocation and forecasts. Customer sponsors left with clearer decisions.
- 🏢 **Commercial judgment**
Million dollar agreement work aligned value cases, adoption plans, and terms. Finance and sales partners trusted the preparation.
- 🎓 **Team development**
Coaching routines helped customer success partners prepare for executive moments. Several high performers gained clearer advancement paths.
- 💡 **Practical innovation**
Agentic AI pilots started with governance and useful planning questions. Customers could test new capabilities without losing control.

SKILLS

Customer Success

Financial Services Banking

Capital Markets Insurance

B2B SaaS Retention Expansion

NNACV CSQL Forecasting

10 K Analysis Value Realization

Scenario Planning Agentic AI

LANGUAGES

English

Native

SUMMARY

Customer Success Director with 16 years in **enterprise B2B SaaS**, including more than a decade leading post sales teams serving banking, **capital markets**, and insurance customers. Directs a \$125M portfolio and a nine person team across the Americas, connecting retention, expansion, adoption, consumption, forecasting, and executive governance. Shapes **million dollar agreements** with sales, finance, procurement, legal, and senior customer leaders. Brings financial fluency across 10 K analysis, customer economics, forecasts, value realization, and scenario planning. Builds practical operating rhythms that surface account risk early and create **qualified customer success pipeline**. Guides agentic AI and Model Context Protocol pilots into governed planning use cases. Coaching managers and partners remains central to stronger executive engagement, career growth, and customer outcomes. Prepared to apply this blend of commercial judgment, financial insight, and customer leadership in an enterprise SaaS setting.

EXPERIENCE

Vice President, Customer Success, Financial Services

Northbridge Planning Systems 📅 January 2022 - Present 📍 Jersey City, NJ

Directs a nine person customer success leadership and partner team across the Americas, supporting a \$125M enterprise SaaS portfolio in **banking**, capital markets, and insurance. Owns **customer outcomes**, commercial performance, executive governance, talent development, and practical adoption of emerging planning technology.

- Directed a \$125M SaaS portfolio across banking, capital markets, and **insurance**, protecting **retention** and expansion.
- Built quarterly inspections using forecasts, consumption, adoption, health, and pipeline signals, surfacing account risk earlier.
- Led CFO and COO value reviews connecting scenario planning with capital allocation, regulatory planning, and forecasts.
- Shaped million dollar agreements through adoption roadmaps, commercial terms, and measurable customer value cases.
- Guided **agentic AI** pilots and Model Context Protocol concepts through governance, sequencing, and practical planning use cases.
- Created coaching and succession routines for nine partners, strengthening **executive engagement** and career progression across Americas.

Senior Director, Customer Success

HarborPoint Enterprise Software 📅 July 2018 - December 2021 📍 New York, NY

Led enterprise customer success for global financial institutions using cloud planning and analytics software. Owned renewals, adoption, expansion identification, escalations, commercial negotiations, and manager development across sophisticated customer environments.

- Led customer success for global financial institutions, aligning renewals, adoption, **expansion**, and escalation plans.
- Reframed **account planning** around 10 K disclosures, financial statements, transformation priorities, and customer business cases.
- Joined utilization, stakeholder coverage, renewal timing, and pipeline into a consistent forecast view for leaders.
- Negotiated seven figure agreements with procurement, finance, legal, and executive sponsors across multiple business units.
- Developed managers through deal **coaching**, executive preparation, performance calibration, and structured career plans.
- Turned recurring customer requirements into **adoption** programs and product feedback, strengthening platform relevance for enterprise users.

Director, Strategic Customer Success

Meridian Cloud Applications 📅 March 2014 - June 2018 📍 Boston, MA

MY CAREER



- Vice President, Customer Success, Financial Services at Northbridge Planning Systems (4.8 Years)
- Senior Director, Customer Success at HarborPoint Enterprise Software (3.4 Years)
- Director, Strategic Customer Success at Meridian Cloud Applications (4.2 Years)
- Customer Success Manager at SummitWorks Software (3.7 Years)

- Managed strategic post sales relationships for large B2B SaaS customers across finance and operations use cases. Coordinated adoption, renewal readiness, value realization, governance, recovery planning, and growth opportunities with senior stakeholders.
- Managed strategic SaaS relationships through adoption, renewal readiness, **value realization**, and growth planning.
 - Built executive governance plans clarifying decision rights, success measures, escalation paths, and quarterly account priorities.
 - Used telemetry, support trends, milestones, and customer objectives to direct recovery plans before renewal risk increased.
 - Partnered with account executives on validated **expansion** opportunities, contributing **qualified customer success pipeline**.
 - Facilitated finance workshops linking planning capabilities with **forecasting**, scenario analysis, resource allocation, and management reporting.
 - Mentored senior managers on **commercial judgment**, stakeholder mapping, negotiation preparation, and concise executive communication.

Customer Success Manager

SummitWorks Software 📅 June 2010 - February 2014 📍 Philadelphia, PA

- Managed enterprise software customers through onboarding, adoption, renewal, and growth cycles. Developed early expertise in recurring revenue management, executive communication, financial planning use cases, and coordinated service recovery.
- Managed enterprise customers through onboarding, adoption, renewal, and growth cycles across finance teams.
 - Built success plans linking software capabilities with budgeting, forecasting, operational planning, and management reporting.
 - Coordinated product, support, services, and sales resources around complex adoption issues and recovery plans.
 - Prepared renewal assessments using usage, support history, stakeholder engagement, and documented business outcomes.
 - Conducted executive reviews translating platform activity into business value, priorities, and agreed planning actions.
 - Earned larger accounts through disciplined follow through, sound escalation judgment, and clear senior stakeholder communication.

PROJECTS

Agentic Planning Adoption Program 📅 2025

Guided controlled agentic AI pilots and Model Context Protocol concepts for enterprise planning workflows, linking governance, adoption sequencing, and practical value hypotheses.

Enterprise Portfolio Inspection Model 📅 2023

Created a recurring inspection model joining renewal forecasts, consumption signals, adoption health, stakeholder coverage, and customer success pipeline.

LEADERSHIP & AWARDS

- Executive Mentor, Customer Success Leadership Forum, 2023 to Present. Supports emerging leaders with account judgment and career planning.
- Customer Success Leadership Recognition, Northbridge Planning Systems, 2024. Recognized for developing partner capability and executive customer engagement.
- Commercial Leadership Recognition, HarborPoint Enterprise Software, 2021. Acknowledged for complex renewal and expansion leadership.

EDUCATION

Master of Business Administration

Rutgers University 🎓 GPA: 4.0 📅 2016 📍 Newark, NJ

Coursework: Financial analysis, strategic management, organizational leadership, operations management

Bachelor of Science in Business Administration

Temple University 🎓 GPA: 4.0 📅 2010 📍 Philadelphia, PA

Coursework: *Corporate finance, marketing management, business analytics, organizational behavior*

CERTIFICATIONS

- Certified Customer Success Manager Level 4 📅 2024
- AI for Business Leaders Certificate 📅 2025

TECHNICAL SKILLS

- **Customer Success Platforms:** Gainsight, Salesforce, Totango
- **Financial Planning:** Anaplan, Oracle Hyperion, Workday Adaptive Planning
- **Forecasting Systems:** Renewal forecasting, consumption forecasting, pipeline forecasting
- **Executive Governance:** Quarterly business reviews, value reviews, account planning
- **Commercial Management:** Contract negotiation, renewal strategy, expansion planning
- **Financial Analysis:** 10 K analysis, customer economics, value cases
- **Enterprise SaaS:** B2B SaaS, cloud software, recurring revenue
- **AI Technologies:** Agentic AI, Model Context Protocol, AI adoption
- **Customer Analytics:** Product telemetry, health scoring, usage analysis
- **Planning Methods:** Scenario planning, capital allocation, operating forecasts

PROFESSIONAL AFFILIATIONS

- Customer Success Leadership Forum, Executive Mentor, 2023 to Present.
- SaaS Financial Services Peer Council, Member, 2021 to Present.

ADDITIONAL INFORMATION

Work Status : Authorized to work in United States. No sponsorship required.

REFERENCES

AVAILABLE ON REQUEST