

Gargee Mehta

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Key Expertise: Customer Relationship Management • Team Building & Leadership • Account Management • Retention Management • Project Management • Reporting and Analysis • Adoption and Risk Analysis • SFDC Reporting

Professional Experience

Sr. CSM Ops Analyst Adobe Inc., Noida (Feb 2020- Till now)

CSM Ops Analysts support our Worldwide Customer Success Management organization by analysing account activity, risk, and usage to support customer retention and growth. The CSM Ops Analyst will deliver results in template or customer proposed templates. He/she will deliver results in predetermined standard templates or customer proposed templates.

Roles & Responsibilities: -

- Ensuring timely completion of recurring activities.
- Process and escalate stakeholder's requests and ensure timely resolution.
- Collaborate with internal teams. Cater to complex ad-hoc custom requests from clients/partners; design efficient and insightful results by extracting and analysing the product data.
- Drive improvements in performance and quality. Suggest improvements to management with respect to process, training, and enablement.
- Analytical, engage with cross functional teams (CSM, Performance Management, Retention Marketing, Consulting, Customer Care, Product Manager, Sales, Renewals Team and Credit) to drive mitigation of customer renewal and satisfaction risk
- Managing overall work distribution within team, while working on own deliverables.

Highlights of current role:

- Workflow management through JIRA dashboard.
- Testing updates on current dashboards and tool upgrades.
- Running enablement sessions with CSMs for relevant process updates.

Project Owner: -

CSM Coverage assignment and governance (APAC):

This project is to ensure that all the customers will have a company representative (CSM) as their first point of contact, for all the post sales queries. It is to ensure complete coverage across all sub regions, following the best in market strategies.

Achievements:

- Promoted to Senior position within team.

Account Retention Specialist, Adobe Inc., Noida (Feb 2017- Feb 2020)

Retention Specialists support our sales and account management organization by analysing account activity, risk, and usage to support customer retention and growth. Retention Specialists will deliver results in predefined or customer proposed templates. Updates may be scheduled or ad hoc requests.

Highlights of current role:

- Evaluating business processes, anticipating requirements, identifying areas for improvement, and developing and implementing finalized process.
- Performing requirements analysis.
- Gathering critical information from meetings with various stakeholders and producing useful reports.
- Managing projects, developing project plans, and monitoring performance.

- Updating, implementing, and maintaining procedures.
- Monitoring deliverables and ensuring timely completion of projects.
- Serving as a liaison between stakeholders (CSMs) and customer.

Roles & Responsibilities: -

- Work directly with sales and account management team on named accounts, vertical, or region.
- Review on-going product usage, account health, risks assessment, upsell/cross-sell, industry trends, customer trends, and competitor landscape.
- Deliver monthly or quarterly account review for upcoming renewals and mandatory product upgrades.
- Fully understand client requests, documenting and engaging appropriate resources.
- Deliver professional quality content for presentations or client meetings.
- Provides actionable insights to various stakeholder groups.
- Role includes responsibilities for Customer Success activities (e.g., product and services adoption, advocacy, retention, etc.) and associated outcomes (e.g., renewals, up-sell, expansions, etc.).
- Analyse risk in Accounts and collaborate with stakeholders to create actions plans & risk mitigation strategies
- Develop mitigation strategy, share best practices, and improvise playbooks on risk mitigation
- Follow up with cross functional teams and mitigate risk associated with the account

Account Management Operations Specialist, Adobe Systems, Noida (August 2013- Feb 2017)

Key Profile: Responsible and accountable for providing support for Account Management to global teams such as Sales, Account Managers, Client Care etc for customer retention through delivery of various reports.

Roles & Responsibilities:

- Manage all the operation activities for CSM teams
- Helping CSM/Sales teams with SFDC Account management, product usage, billing, and invoicing queries.
- Collaborating with client care, sales, product teams being single point of contact for CSM community.
- Review on-going product usage, account health, risks assessment, upsell/cross-sell, industry trends, customer trends, and competitor landscape.
- Deliver monthly or quarterly account review for upcoming renewals and mandatory product upgrades.
- Deliver customer facing content such QBRs, Newsletter and engagement plans for CSM-client meetings.
- Provides actionable insights to various stakeholder groups
- Analyse risk in Accounts and collaborate with stakeholders to create actions plans & risk mitigation strategies
- Follow up with cross functional teams and mitigate risk associated with the account

Individual Responsibilities: -

1. **Forecasting Deck:** It showcase renewal rate, resolved unresolved deals, account At-risk, status and next action for all active accounts in APAC and providing week on week updates. It's a combination of three reports: -

Compiled Feedback reporting: It is a dashboard based on compiled Feedback data which shows resolved and unresolved deals for all sub-regions of APAC. Also, comparing actual renewal rate with projected renewal rate.

Forecasting BOB: Identifying accounts at risk of attrition and respective executive summary, current situation, and next action. It combines information form ARR and SFDC.

Forecasting Deck: Presenting the summarized data from forecasting BOB in a deck.

2. **Partner Capability Dashboard:** This dashboard shows all the APAC partners categorized basis on GEO, partner level, priority and DMA Solutions and represent the total number of trained and certified resources for each categorization. It combines data from LinkedIn, At-task, and certified resources tracker.
3. **CSM hierarchy Tool:** Collaborated with PMT to created CSM Hierarchy Management tool which is a web-based browser application that allows CSM Management to review and update changes in to global CSM hierarchy. Tested the output in staging

phase and provided insights for the amendments. The primary reports which use data from this tool are Compiled Feedback (CF) and Book of Business (BOB).

Skills:

- Basic DMA Adobe solution work functionality.
- Hands on experience in salesforce reporting, SharePoint, Tableau, MS Office.
- Operations management
- Adaptive to work environment and high learning curve.
- Time management and organizational skills

Awards and Achievements:

Awarded with Delight Driven category for Q4 FY 2016
Awarded in Performance Excellence category for Q4 2013.
Worked on multiple projects and helped with automation.

HCL Technologies Ltd, Noida (Nov-2011- July 2013)

Designation: Sr. Analyst

Key Profile: Email support which provides resolution to the customer's query. .

- First Point of contact for all Nokia users (Client for HCL) regarding any request or Incident.
- Assist users with all the queries/ requests for Mobile and Hoc connections.
- Keeping a track of all the requests till resolution, following up with the resolving group till the satisfactory resolution is not received.
- We log tickets through ITSM and keep a track of it till the resolution.
- Troubleshoot for queries regarding Mobile and Hoc issue.

Additional Responsibilities

- Reporting (reports related to daily workflow) and work distribution for team.
- Sharing Process related updates on Daily basis.

Tools Used:

- VMT, ITSM, Outlook, MS-Excel, Citrix platform.

Achievements:

- Received outstanding performer Award for exemplary performance.
- Got promoted to Senior Analyst from Analyst.

Technical Skills

- Basic knowledge of Ms-Excel and Outlook.
- Operating System: Windows 7, Windows XP.
- Working experience of Citrix environment.

WIPRO BPO (March 2011-November 2011)

Process: Verizon

Designation : Technical Support Associate

Responsibilities:

- Technical support for Internet Service provider.
- Assist users with all the issues related to Internet connectivity and trouble shoot for the same

Academics

- **B. Tech.** from **Uttar Pradesh Technical University** - (In Electronics and Communication). **Session: 2006 – 2010.**
 - **XIth** from **DPGIC**. **Session: 2004 – 2005.**
 - **Xth** from **S.K.R.V.** **Session: 2002 – 2003.**
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Personal Assessment

A Confident, self-motivated, enthusiastic, who is ready to accept challenges and has strong determination towards achieving goal set by/for her.

(Gargee Mehta)