

LISA MARION

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CUSTOMER SUCCESS ENABLEMENT | WORKFLOW OPERATIONS | CUSTOMER OPERATIONS

Operationally focused SaaS professional with 10+ years of experience improving workflows, customer operations, internal processes, and cross-functional collaboration within high-growth technology organizations. Experienced leveraging AI-assisted tools, scalable systems, documentation, and workflow automation to improve operational efficiency while maintaining strong human-centered customer experiences.

Brings a unique combination of Customer Success expertise, operational process thinking, customer journey knowledge, and practical AI adoption experience across remote SaaS environments.

CORE COMPETENCIES

AI-Assisted Workflow Design | Operational Process Improvement | Knowledge Management | Workflow Automation | Customer Systems & Operations | Cross-Functional Collaboration | Documentation & SOP Development | Scalable Process Design | Customer Journey Optimization | Operational Enablement | Salesforce | Glean | Accord | Zendesk | Gainsight | Catalyst

PROFESSIONAL EXPERIENCE

Greenhouse Software (SaaS) — Mid-Market Customer Success Manager

Remote | April 2025 – Present

- Built AI-powered Glean agents and workflow automations to streamline internal processes, improve information accessibility, and reduce manual administrative effort.
- Developed scalable templates, documentation systems, and workflow processes to improve operational efficiency and customer management consistency.
- Manage a ~\$2.5M ARR portfolio of approximately 70 SaaS customers while maintaining roughly 92% retention.
- Build collaborative success plans in Accord to improve stakeholder alignment and customer outcomes.
- Partner cross-functionally with Account Management, Product, Support, and Services teams to improve operational coordination and customer experience.
- Conduct proactive business reviews and success planning focused on adoption, retention, and long-term customer value.

EcoOnline (SaaS) — Senior Customer Success Manager

Remote | October 2023 – April 2025

- Streamlined onboarding, renewals, and knowledge management workflows using automation and scalable operational processes.
- Reduced manual administrative workload by 10+ hours weekly through workflow optimization initiatives.
- Collaborated cross-functionally to improve operational alignment and customer outcomes.
- Mentored team members and contributed to scalable customer engagement and operational best practices.

Igloo Software (SaaS) — Customer Success Manager

Remote | September 2021 – October 2022

- Contributed to operational process improvements including SOP development and internal workflow initiatives.
- Partnered cross-functionally to improve customer experience and advocate for product enhancements.
- Managed strategic customer relationships across a \$3M+ ARR portfolio.

Q4 Inc. (SaaS) — Customer Success Manager

Remote | February 2020 – September 2021

- Managed a high-volume SaaS portfolio while supporting customer adoption and operational alignment.
- Surfaced customer feedback internally to support product and operational improvements.

Shopify (SaaS) — Merchant Success Manager

Remote | February 2018 – June 2019

- Delivered technical support and platform guidance to SMB and enterprise merchants.
- Supported platform adoption and customer enablement in a fast-paced SaaS environment.

EDUCATION

Sheridan College — Diploma, Business Advertising

CERTIFICATIONS

- Gainsight Customer Success Manager I & II
- Command of the Message Training