

Gerry Butler

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OBJECTIVE

A highly skilled and certified professional with expertise in ERP systems, GTM software, and project management seeks a challenging position to utilize comprehensive skills in driving customer success, managing projects, and achieving revenue growth within a dynamic organization.

PROFESSIONAL EXPERIENCE

Customer Success Manager

Sep 2021 – Present

OCR Services, INC - Rockville, MD

- Strengthened key enterprise account relationships, boosting customer health and retention by 25% through strategic engagements and personalized success plans, reinforcing the product strategy and execution.
- Implemented a customer health monitoring system, using analytics to proactively address service disruptions and optimize product usage, reducing issue resolution time by 33%.
- Orchestrated cross-functional teams through the design and support phases of new client service implementations, accelerating project timelines by 30% and enhancing integration efficiency and product scalability.
- Advocated for customers, leveraging detailed feedback to drive a strategic enhancement of product features, increasing adoption by 18% and directly impacting customer satisfaction and retention.
- Mentored and led a team of Customer Success professionals, developing training programs and resources that enhanced team skills and performance, leading to a 22% improvement in team productivity.
- Directed quarterly Executive Business Reviews, collaborating closely with Sales and Product Management to shape strategic insights that influenced significant decisions on customer retention and product expansion opportunities.
- Championed the deployment of new automation technologies using Jira and ClickUp, enhancing the Customer Success team's operational accuracy and process efficiency significantly.
- Led the Help Desk / Customer Support team through a comprehensive transition to ZohoDesk, overseeing the rollout of the new help desk system, redefining product definitions, customer licensing, and conducting training for new agents. This strategic initiative streamlined customer support operations and improved service delivery.

TECHNICAL SKILLS

Product Management Tools: Jira, Confluence, ClickUp, ZohoDesk, Aha, Canny

Analytics and Reporting: Google Analytics, Tableau, Excel

CRM Software: Salesforce, Hubspot

Agile Methodologies: Scrum, Kanban

PROFESSIONAL CERTIFICATION

- Certified Scrum Product Owner
- Certified Scrum Master
- PRINCE2 Agile
- ITIL V4 Foundations



PROFESSIONAL EXPERIENCE

SR Business Analyst

Jan 2020 – Sept 2021

Moog, INC – East Aurora, NY

- Managed four implementations of GTM software solutions covering SAP GTS, US AES Custom filing, International roll-out & maintenance of Visitor Management Facility controls, Jurisdiction & Classification standardization, and Export Operations Pack Slip Integration
- Led Moog's ERP Transformation Team as a Global Business Process Owner for the Trade Compliance Department
- Provided guidance on trade regulations to other workstream leads, IT Leadership, and Program Management as Moog migrated their ERP systems and business processes to SAP S/4
- Managed a professional service agreement and related projects between OCR and Moog to integrate OCR EASE software with SAP S/4
- Led the project discovery team for replacing the Technical Data document transfer and storage system
- Solicited requirements from the internal business, conducted vendor demos, and ensured alignment with regulations and IT security requirements
- Led the project to integrate OCR EASE software solution with Microsoft Identity Management (MIM) to standardize the creation and provision of Active Directory groups
- Served as the subject matter expert for Corporate Trade Compliance on the company Intake process
- Was responsible for evaluating software solution requests and applications to ensure trade compliance and IT requirements were upheld
- Was responsible for collecting and managing trade compliance policies and procedures to ensure each operating group's content aligned with corporate standards. This included maintaining a relationship matrix between policy, procedure, and software solutions used by each operating group to achieve regulatory, industry, and company standards
- Assisted the Corporate Trade Compliance Audit function with IIED, Voluntary Disclosures, and Corrective Action assignments as required

Product Manager – Security & ID

Sept 2016 – Dec 2019

OCR Services, INC – Rockville, MD

- Drove a 30% growth in annual recurring revenue to \$250,000 by strategically expanding the Security & Identity product suite, underpinned by thorough competitive market analysis and roadmap execution.
- Researched the competitive market space for Visitor Management, Identity Management, & Denied Person screening software applications to produce a product gap analysis & strategic development roadmap.
- Functioned as a Scrum Master, organizing and prioritizing product backlogs in Jira to streamline the development process. Led sprint planning, reviews, and retrospectives, ensuring agile best practices were adhered to and accelerating product time-to-market.
- Authored comprehensive business requirements documents, catalysing enhancements in the Security & Identity product suite that addressed critical market and customer demands.
- Communicated BRD with development teams and supported development & QA through the software development lifecycle process.
- Led cross-functional teams across engineering, business development, and implementation, delivering key product milestones that enhanced collaboration and unlocked new revenue streams.
- Led implementation teams to ensure the successful rollout of the Security & Identity product via SaaS or On-Prem customer infrastructure models
- Compiled weekly status reports for the COO outlining schedule progress, financial status, and potential risks
- Enhanced customer service delivery by establishing operational protocols within the OCR Customer Excellence office, which significantly improved post-implementation support and customer satisfaction metrics.

Business Analyst

Jan 2010 – Sept 2016

OCR Services, INC – Rockville, MD

- Successfully managed ten medium-to-large-scale software implementations of the OCR EASE product suite to meet commercial and defense & aerospace customers' requirements
- Served as the Technical Account Manager for the tier-one customer base, accounting for \$400,000 in annual revenue
- Effectively documented customers' "problem statements" with complementing requirement definitions translated to the appropriate functional team
- Created Visio diagrams to document the "current state" business process, highlighting pain points, and presented the "future state" with a streamlined process flow, along with prototype UI application designs
- Led meetings with business stakeholders to gather and analyze complex requirements, developing tailored solutions that achieved business goals of automation, efficiency, and compliance
- These projects' outcomes created essential modules of the OCR EASE Product Suite, including Watch List Screening, Visitor Management, Export Operations, DSEA Management, & Commodity Classification
- Created and executed quality use case scenarios & traceability matrices to validate that the system design met client requirements
- Wrote product release notes, technical documentation, training materials, and user guides for assigned solutions
- Used critical thinking skills to resolve reported issues and leveraged the CRM tool to record account transactions
- Served as a subject matter expert for the Business Development team, conducting Product Solutions demos to prospective companies
- Assisted in completing RFI/RFP and Hosted IT Security Questionnaires that resulted in new sales
- Wrote and maintained company-wide IT Policies and Guidelines

Claims Auditor

Mar 2010 – Sept 2010

BlueCross BlueShield – Washington D.C.

- Examined claims to identify essential processing requirements based on diagnosis, provider, medical policy, contracts, and procedures
- Used multiple databases/document management systems such as SharePoint, NASCO, NPS, ICD-9, and MPPCI to research and resolve critical system errors
- Accessed communication software such as Lotus Notes and SharePoint to apply information/policy guidelines to edit resolutions
- Performed low-dollar volume audits (\$20,000/\$5,000 thresholds) on facility and professional insurance claims
- Assisted Customer Service Reps by providing feedback on benefit verification for providers/members
- Gathered productivity data and compiled weekly and monthly reports on own performance
- Completed BCBS BlueCard Training and development program, gaining knowledge/experience with medical terminology, insurance products, and health-related services

EDUCATION

Bachelor of Arts - Art History,

May 2008

McDaniel College - Westminster, MD

SOFT SKILLS

Leadership and Team Management: Proven ability in leading cross-functional teams and managing diverse groups effectively.

Strategic Thinking and Problem Solving: Ability to develop strategic roadmaps, perform competitive analyses, and solve complex problems creatively.

Communication and Presentation: Excellent written and verbal communication skills, adept at presenting ideas and reports to stakeholders at all levels.

Customer Advocacy: Strong focus on understanding customer needs and enhancing their satisfaction through targeted product improvements.