GERRY BUTLER

Customer Success Manager

DETAILS

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CERTIFICATIONS

PRINCE 2 Agile
2023

ITIL V4 Foundations
2021

EDUCATION

McDaniel College

Art History
Honors / Class of 2008

SKILLS

Project Management Tools:
Jira, MS Project, ClickUp, Trello, Visio

CRM Tools:
Salesforce, Hubspot, SugarCRM, MSD365

GTM Software:
OCR EASE, VC & Descartes, SAP GTS

ERP Software:
Oracle, Infor, SAP

Integration & Database Services:
SQL, Oracle, XML, API, Web Services

PROFILE

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.

EXPERIENCE

OCR Services, INC

Customer Success Manager

Sept. 2021 - Present

- Own and manage the overall customer relationship (internal and external), ensuring customer satisfaction and long-term success
- Track agreement scope, budget, and maintain a timeline for the duration of the customer relationship
- Increase the software product's adoption rate by 24% resulting in a 20% increase of products acquired by customers assigned. Result: $175,000 annual revenue growth
- Function as the main point of contact for the customer through their entire lifecycle (Pre-Sales, Sales, Implementation, Go-Live, Hypercare, Production Support)
- Function as the project manager during the client's implementation phase, working cross-functionally with product, engineering, and customer support leads to document customer requirements, training needs, execute UAT best practices, and properly transition to the support function
- Collaborate with the product team to prioritize customer feedback and influence product roadmap decisions
- Lead a cross-functional team to successfully resolve critical customer issues, resulting in the customer's continued partnership and positive feedback
- Implement a customer health scoring and weekly project readout system, enabling early identification of at-risk customers and proactive intervention to prevent churn
- Implement a business development hand-off process to transition the customer from Sales to Implementation smoothly
- Focus on collecting customer requirements and business commitments, and document project scope & expectations to allow the implementation project management function to operate more efficiently
- Function as the subject matter expert on the latest industry news to write blog and media posts for the Marketing Department's blog and outreach efforts
- Mentor and onboard new members of the support, implementation, and success teams, contributing to their professional growth and team performance
- Cultivate a culture focused on empathy, listening first, and being proactive vs reactive through partnerships with cross-functional departments like Human Resources and Career Coaches.

Moog Inc

Sr Business Analyst

Jan. 2020 - Sept. 2021

- Managed four active 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

EXPERIENCE

- 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.

OCR Services, INC
Manager- Security ID Product & Customer Excellence

Sept. 2016 - Dec. 2019

- Managed the Security & Identity product suite, producing $250,000 in recurring product revenue
- Researched the competitive market space for Visitor Management, Identity Management, & Denied Person screening software applications to produce a product gap analysis & strategic development roadmap
- Wrote business requirement documents to enhance the security & identity product suite
- Communicated BRD with development teams and supported development & QA through the software development lifecycle process
- Managed cross-functional teams to execute Security & Identity product suite strategic milestones, including engineering, business development, & implementation groups, to increase 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
- Led the creation of OCR Customer Excellence organization: its business model and value proposition focused on providing customer-focused services to retain the company's revolving revenue stream
- Was accountable for the day-to-day management of the OCR Customer Excellence office in Ocean City, MD, and responsible for all post-implementation customer-focused activities
- This included help desk inquiries, SLA management, account recurring training, E-learning content management, and user guide content management
- Established successful communication processes between business development, implementation, & customer excellence organizations to ensure optimal efficiency & transparency between the company's functional organizations
- Provided onboarding structure to new employees and trained them on the organization's best practices & software solutions

OCR Services, INC
Business Analyst

Sept. 2010 - Aug. 2016

- 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

EXPERIENCE

- 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.

Blue Cross Blue Shield
Claims Auditor

Mar. 2010 - Sept. 2010

- 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.