Bowman Williams

MONICA COLON

CUSTOMER SUCCESS MANAGER | ENTERPRISE ACCOUNT MANAGER

SAAS & FINANCIAL SERVICES EXPERT | COMPLIANCE SPECIALIST | REVENUE GROWTH LEADER

EXECUTIVE SUMMARY

Customer Success Manager with 10+ years driving enterprise SaaS revenue growth in financial services, payments, and compliance sectors. Proven track record managing Fortune 500 accounts achieving over 100% net revenue retention and consistently ranking as top 10% performer. Generated $70M+ in annual revenue while managing portfolios up to $4.5M ARR across 100+ accounts. Expert in upsell/cross-sell strategies, contract negotiations, and building C-level partnerships. Skilled at analyzing customer usage data, payment architectures, and compliance workflows to identify expansion opportunities and mitigate churn risk.

CORE COMPETENCIES

- Technical Account Management & IT Advisory (B2B & SaaS)
- API Integrations
- Contract Negotiation & Due Diligence Support
- Customer Success & Retention Strategies for B2B & SaaS Clients
- Cybersecurity, Risk Management & Compliance
- Project Management, Solution Delivery & API Integrations
- Stakeholder Engagement & C-Level Partnerships
- Vendor & Partner Coordination
- QBRs Product Demos
- Business Continuity, Disaster Recovery & Office Buildouts

PROFESSIONAL EXPERIENCE

CUSTOMER SUCCESS MANAGER 2025-Present

Harbor IT – Boston, MA (Remote)

- Manage $4.5M+ portfolio of 100+ enterprise accounts across financial services, legal, healthcare, manufacturing, and technology sectors, serving as primary point of contact and driving retention, renewals, and expansion revenue.
- Lead full customer lifecycle including onboarding, executive business reviews, and strategic account planning to align IT solutions with client objectives and identify upselling opportunities.
- Own renewal process and collaborate with sales teams to expand service adoption, consistently achieving 10%+ net portfolio uplift and limiting churn to under 5%.
- Analyze customer usage data and engagement metrics to proactively identify risks, mitigate churn, and recommend strategies for maximizing service value.
- Champion client advocacy through NPS campaigns, feedback collection, and escalation management to maintain over 90% client health scores.

Key Accomplishments:

- Achieved over 100% net revenue retention managing 100+ accounts with $4.5M+ ARR and under 5% churn rate.
- Maintained 90%+ client satisfaction through proactive engagement and strategic quarterly business reviews.
- Generated expansion revenue opportunities through strategic needs assessment and solution positioning.

TECHNICAL ACCOUNT MANAGER 2024-2025

Omega Systems – Reading, PA (Remote)

- Managed 35+ enterprise clients with $10M+ MRR across finance, legal, and manufacturing, driving technical account strategy and commercial growth through monthly business reviews and quarterly technology assessments.
- Led upsell sales cycle from discovery through close, developing custom proposals, negotiating contracts, and converting customer needs into qualified expansion opportunities generating $450K in new revenue.
- Developed strategic account plans and technology budgets, collaborating with solution architects to identify risks and opportunities aligned with compliance frameworks (SEC, CMMC, PCI DSS, NIST CSF).
- Analyzed customer utilization data to proactively address renewal concerns and mitigate churn risk, achieving zero churn across portfolio.

Key Accomplishments:

- Exceeded quota with 106% net revenue retention and increased portfolio MRR from $178K to $500K (181% growth).
- Generated $690K in new revenue ($450K hardware/software + $240K managed services contracts) within first year.

- Secured 80% renewal rate for new client onboarding contributing $30K MRR.

GLOBAL CUSTOMER SUCCESS MANAGER 2022-2023

Prove – New York, NY (Digital Identity & Fraud Prevention SaaS)

- Pioneered first global CSM role managing 30-35 Fortune 500 accounts including Mastercard, PayPal, Apple, and TransUnion across payments, banking, and fintech verticals generating $70M+ annual revenue.
- Managed full customer lifecycle from onboarding through expansion, analyzing payment data flows and API architectures to identify upselling opportunities and develop custom proposals addressing pricing and technical requirements.
- Designed and delivered QBRs to C-level stakeholders highlighting ROI, API performance metrics, and fraud prevention capabilities to drive 25% increase in customer engagement.
- Built strategic partnerships with global credit bureaus and financial institutions to expand market reach and secure $5M+ in new revenue through Brazil partnership.
- Collaborated with legal, compliance, and sales teams to negotiate contract renewals and structure solutions meeting customer compliance workflows and regulatory requirements.
- Monitored usage metrics and engagement data to identify trends, mitigate churn risk, and maximize platform value, improving NPS from 89% to 94%.

TECHNICAL ACCOUNT MANAGER 2020-2022

Abacus Group & S7 Technology Group (Acquired by Thrive) – New York, NY

- Managed 50+ enterprise accounts across hedge funds, private equity firms, and family offices in financial services sector.
- Conducted strategic business reviews, identified expansion opportunities, and negotiated contract renewals to drive profitability and retention.
- Served as trusted technical advisor on complex implementations including migrations, acquisitions, and office buildouts.

CLIENT IMPLEMENTATIONS MANAGER, PORTFOLIO & RISK ANALYTICS 2015-2020

Bloomberg LP – New York, NY

- Managed enterprise client implementations for portfolio and risk analytics solutions across financial institutions
- Coordinated cross-functional teams to deliver complex technical implementations, API integrations, and customer training programs.
- Conducted product demonstrations and strategic reviews to drive platform adoption and customer satisfaction.

VICE PRESIDENT, FIXED INCOME OPERATIONS 2011-2015

BBVA Securities LLC – New York, NY

- Led fixed income operations and compliance workflows for securities transactions, managing payment processing systems and data flows for institutional trading operations including settlement, reconciliation, and regulatory reporting.

EDUCATION & CERTIFICATIONS

BACHELOR OF SCIENCE IN FINANCE – St. John's University, *New York, NY*
Graduated Magna Cum Laude **|** *Full Academic Scholarship*

CERTIFICATIONS: Notary Public – (*State of New York)* | FINRA Series 7 and 63 (Expired) | CAPM (in progress) | ISC2 (in progress)

TECHNICAL SKILLS & LANGUAGES

CRM & CS Platforms: Salesforce, HubSpot, ChurnZero, ServiceNow, Monday.com, Asana, ConnectWise, AutoTask
Technical Tools: Looker Studio, API Integration Experience, Bloomberg Terminal, Splunk, IT Glue, JIRA, Confluence, XML, sFTP
Languages: English (Native), Spanish (Fluent), Brazilian Portuguese (Fluent)