Meg Kennedy

Riverside, CA (remote)
meg@hire-meg-kennedy.com | linkedin.com/in/meg-kennedy | hire-meg-kennedy.com

PROFESSIONAL SUMMARY

Client success and support operations manager with 11 years at Tom Ferry, a real estate coaching and SaaS company, promoted from client success rep to second-line manager. Leads Placement for about 100 new clients a month, co-leads the Success Ambassadors team, and has held same-day case completion at 89 to 96%. Builds AI tools for her own work that other managers have adopted. Strongest at finding why something in the client experience keeps breaking and fixing the cause.

EXPERIENCE

Ferry Intl. LLC (Tom Ferry), Santa Ana, CA

January 2015 – Present

Manager, Client Success *January 2026 – Present*

- Co-lead the Success Ambassadors team and lead Placement, managing 8 people including 2 supervisors, with operational oversight across a 40-person Client Success department. Title changed from Digital Support Manager in a January 2026 reorganization.
- Own onboarding and placement for about 100 new coaching and SaaS clients a month, from signed contract through coach handoff.
- Own the Q4 2026 placement targets, including average time to placement under 4 days for new clients; launched round-robin welcome calls and set daily placement goals with the team.
- Built Daily Desk, a scheduled Claude agent that runs three times a day across Salesforce, Outlook, Zoom, Slack, and Asana; it ranks open work, drafts client replies, logs commitments from meetings, flags at-risk clients, and tracks team reply times and placement coverage.
- Designed Daily Desk to be read-only: it never writes to Salesforce, sends email, or posts in Slack. Packaged it as a self-install kit; one fellow manager uses it daily and two more are rolling it out.
- Building What's Next, a guided workflow tool covering about 70 case and call types, with branching steps, tier-specific scripts, and ready-to-paste Salesforce notes; in testing ahead of team launch as a Chrome extension.
- Help hold churn below 5% as part of CS leadership for a 5,000-member coaching base; work renewal, pause, and cancellation cases directly, including saves under the 13th-month-free renewal offer.
- Ran the response to a billing error that double-charged 61 clients: built the affected-client list, got refunds to Accounting the same morning, and audited call counts afterward.
- Built the target list for the Elite upgrade campaign, choosing the GCI threshold and coordinating an MLS data match across 676 Core clients.
- When coaches were slow to adopt a new pre-session form integration, proposed a Tom Ferry template and presented it to coaches once Product built it; 29 of the 57 coaches now using it chose the template.
- Sole manager for Pivot, a 350-subscriber webinar product, owning tier 2 support; traced recurring login failures to how the Zoom webinars were set up, using a Claude-assisted review of support cases and voicemail transcripts; the content team changed the setup and webinar support cases fell from about 30 a week to zero.
- Built an automated weekly QA review with Claude that pulls call transcripts and Salesforce case data, flags interactions worth coaching on, and posts to Slack.
- Brought client and coach feedback to Product that led to automatic case routing to Success Ambassadors.

Digital Support Manager *May 2023 – January 2026*

- Set and tracked team service targets, holding same-day case completion at 89 to 96% against an 85% target, clearing the new-case queue by end of day, and keeping rescissions under 10 a month.
- Hired two support staff, ran performance improvement plans, and cross-trained each team member to back up another team.
- Surveyed the team on training needs and ran monthly trainings at All Hands; trained coaches on Metabase reporting.
- Ran the call and SMS campaign that registered 2,000 coaching clients for the 2024 Elite Retreat, a member event, and wrote the campaign SOP.
- Led the 2025 cleanup of the Elite, Core, and Referral private Facebook groups, working alongside the team to remove more than 3,600 non-clients so member groups held current clients only.
- Business analyst on ES 2.0, a company-wide rebuild of Salesforce, HubSpot, Five9, Shopify, Stripe, Absorb LMS, the website, and the member SaaS product (live April 2025). For the 60-user Five9 phone system, wrote routing and IVR requirements from the reasons clients call in, wrote the UAT scenarios, and ran acceptance testing with the contractors; tracked and escalated post-launch issues.
- Ran referral program payouts and built a new payout process.

- Lead the Summit livestream support team each year, training staff with mixed technical skill; on day one of the 2025 livestream the team received 1,176 cases and closed 810.
- Sole support contact for Revii AI, an internal AI coaching product; primary technical escalation point across the business; standardized client templates, SLAs, and escalation workflows.

Digital Support Supervisor *February 2022 – May 2023*

- Supervised SaaS support operations and QA for a team of 4 to 6, including three staff in the Dallas office managed remotely from California.
- Developed SLA frameworks and trained the team in SLA-driven communication; managed the client-facing Jira queue, routing escalations and documenting bugs for product review.

Product Support Lead *August 2018 – February 2022*

- Provided tier 2 SaaS support for complex account, billing, and technical issues, and channeled user feedback to the product team.
- Led the move of coaching sessions from phone to Zoom (2018 to 2019); wrote internal and client-facing documentation, including feature walkthrough videos.

Operations Analyst *August 2017 – August 2018*

- Built executive-level Salesforce dashboards and KPI reports; analyzed contractor coaching program data, and the findings informed retention strategy.

Lead Client Success Representative *January 2015 – August 2017*

- Managed client accounts, renewals, billing, and first-level escalations; promoted from Representative to Lead in March 2017.
- Documented department processes, wrote the team manual, and built Salesforce performance reports.

Operations Team Leader (Asst. Store Manager) | Jo-Ann Stores LLC *April 2009 – December 2014*

- Ran daily operations, scheduling, and payroll for a team of 25 to 30; stepped in as Acting Store Manager during the 2010 holiday season after an abrupt management departure.

PROJECTS

SCHEDA: Class Registration Platform | scheda.sca-caid.org *Launched 2026*

- Designed and built, with Claude, a class registration platform for a nonprofit of about 1,200 members: WordPress front end, Google Sheets back end, Apps Script automation. Includes returning-teacher profiles, waitlists, volunteer scheduling, and steward reporting; live for its first major event, with change management for non-technical volunteers.

SKILLS & PROFICIENCIES

Systems & Tools: Salesforce CRM and Service Cloud (11 yrs), Jira (6 yrs), HubSpot, Five9, Absorb LMS, Metabase, Shopify, Stripe, Asana, Slack, Zoom, Microsoft 365, Google Workspace, Google Apps Script, WordPress, Claude (scheduled tasks, connectors, artifacts), ChatGPT

Core Competencies: Team leadership and coaching, hiring and performance management, client onboarding and placement, escalation management, service target design and tracking, process documentation, training programs, QA oversight, KPI reporting

Operations & Project Work: Enterprise system coordination, requirements gathering, UAT and acceptance testing, vendor and contractor management, cross-functional project management, change management, data cleanup, AI workflow design

Support Specialization: SaaS technical support, client retention, de-escalation, billing incident response, voice-of-customer feedback loops, AI product support, AI-assisted QA

VOLUNTEER LEADERSHIP

Kingdom Chatelaine | Society for Creative Anachronism (SCA), Kingdom of Caid *2024 – Present*

- Lead recruitment, newcomer onboarding, and volunteer officer teams for a 501(c)(3) historical education nonprofit of about 1,200 members.

Event Lead, WorldCon (LAcon V) | SCA Kingdom of Caid *August 2026*

- Ran the SCA's five-day presence at the Anaheim Convention Center, coordinating nearly 70 volunteers across a makerspace, fan table, live combat demo, and panel; handled scheduling, insurance, and floor planning.

EDUCATION

CSU Transfer Certification (AA equivalent), Psychology | Irvine Valley College