Rachel Morgan

Customer Success Manager

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Professional Summary

Account manager with six years in B2B software. For the last three I have looked after 120 small-business accounts at a scheduling software company and brought 40+ new ones on board each quarter.

Employment History

Account Manager Mar 2021 - Present
Bookwell Austin, TX

- Ran customer onboarding for 40+ new accounts a quarter, from the kickoff call to the first month live.
- Managed a book of 120 small-business accounts in HubSpot.
- Built monthly churn and retention reports for the leadership team, flagging at-risk accounts early.
- Wrote the help-center guides that cut support tickets by a third.

Customer Support Specialist Jan 2019 - Feb 2021
Ledgerly Austin, TX

- Answered 60+ customer questions a day by chat and email, in English and Spanish.
- Trained 15 new support hires on the product and our tone of voice.

Skills

HubSpot
Zendesk
Google Sheets
Customer training
Help-center writing

Education

Bachelor's in Business Administration 2014 - 2018
Texas State University

Languages

English Native
Spanish Fluent