

# JONATHAN M. SCHMIDT

The AI CSM · Enterprise Client Success Lead · Builder of Teams, Systems & Revenue

*Architecting the systems that translate client data into the language revenue teams understand*

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## EXECUTIVE PROFILE

Client Success executive with 12+ years driving enterprise SaaS revenue, retention, and digital transformation across PropTech, FinTech, and Payments. I build things: CS organizations from scratch, AI adoption frameworks that actually ship, playbooks that outlast my tenure, and client relationships that compound over years.

Currently architecting the future of AI-integrated Client Success — not as a concept, but as operational reality. The next chapter is about taking that system and scaling it beyond the walls of any single organization.

28%

ARR Growth

94%

Retention Rate

\$1M+

Cost Savings

24

Enterprise Clients

## WHAT I BUILD

*Three things define every engagement I lead:*

### REVENUE SYSTEMS

Post-adoption strategies tied directly to client business objectives — not activity metrics. Growth that compounds.

### AI WORKFLOWS

Generative AI embedded into CS operations: health scoring, churn prediction, automation, and executive-ready business cases for adoption at scale.

### HIGH-TRUST TEAMS

Hiring frameworks, cross-functional operating models, and the kind of leadership culture where people actually want to execute.

## PROFESSIONAL EXPERIENCE

**Senior Lead, Enterprise Client Success** June 2024 – Present

**Global Payments (Zego)** · Remote — Chicago, IL

- ▶ Own strategic outcomes for a 24-client enterprise portfolio valued at \$8M+, serving as the executive-level growth partner across PropTech and Payments verticals.
- ▶ Drove 28% annual revenue growth through post-adoption strategies built around each client's business objectives and expansion potential — not upsell quotas.
- ▶ Maintained a 94% client retention rate — 20+ points above industry benchmark — through proactive lifecycle management, QBR-driven executive alignment, and early risk intervention.

- ▶ Architected a company-wide AI adoption initiative for the CS organization: authored the business case, built the 7-slide executive pitch deck, and designed a phased generative AI rollout framework for VP and Director leadership.
- ▶ Led a cross-functional team of 6 across Product, Implementation, and Support — operating as both strategic lead and execution anchor.
- ▶ Identified untapped revenue streams through competitive analysis, individually driving 20% investment growth across the portfolio.
- ▶ Delivered \$1M+ in annual client operational savings by redesigning workflows within PLG frameworks and leveraging data-driven process optimization.
- ▶ Designed re-engagement campaigns achieving a 40% engagement lift through precision lifecycle-stage targeting and at-risk recovery architecture.

## Senior Client Success Manager, Lead — Strategic Partners *October 2015 – June 2023*

**RealPage, Inc.** · Dallas, TX (Remote)

*8 years. 3 promotions. 100+ enterprise accounts. The place where I built the playbook I've been running ever since.*

- ▶ Built and operationalized growth strategies for 100+ enterprise PropTech accounts — combining platform analytics, roadmap alignment, and business outcome consulting into a single integrated motion.
- ▶ Earned three successive promotions through product adoption initiatives in a niche vertical that no one else owned — demonstrating that subject-matter depth creates leverage.
- ▶ Created cross-training programs that elevated internal communication quality and directly contributed to margin improvement for both clients and the business.
- ▶ Led a company-wide billing and contract remediation initiative after identifying systemic discrepancies — standardizing processes and recovering meaningful revenue leakage.
- ▶ Delivered C-Suite platform presentations that translated product capability into executive-level business impact narratives, accelerating expansion decisions.

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## CORE EXPERTISE

**AI in Client Success** Generative AI workflow design · AI-driven health scoring and churn prediction · Prompt engineering for CS automation · AI adoption change management · Executive business case development

**CS Leadership & Operations** Team building and hiring frameworks · CS playbook architecture · Lifecycle management · QBR/EBR strategy · Retention and expansion playbooks

**Strategy & Execution** Agile · PLG frameworks · Competitive analysis · Digital transformation consulting · Lean Six Sigma · NLP methodology

**Technology** Salesforce · JIRA · Snowflake · Looker · Microsoft Office Suite (Certified) · Google Suite · Adobe Creative Suite · Canva

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## EDUCATION

**B.A., International Affairs — Emphasis in Humanities | Minor in German** *University of Georgia*

NCAA Division I Men's Swimming & Diving — 4 years, Senior Captain. 22x Academic All-American. 3x Olympic Trials Qualifier. Competed at the highest collegiate level while maintaining academic distinction; the discipline required to do both simultaneously is the same discipline that runs every team and portfolio I've led since.

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## LANGUAGES & GLOBAL ACUMEN

Plattdeutsch (Native) · English (Native) · Spanish (Fluent) · German (Proficient) · Tagalog (Conversational)

*40+ countries. New language fluency in under 9 months, including non-Latin alphabets. Adaptability is a competency, not a personality trait.*