

Steven Ricard

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SUMMARY

Most of my work has involved solving operational problems by building practical systems and workflows that make teams easier to scale and day-to-day work easier to execute. That work has primarily been within Customer Success, Professional Services, enablement, and strategic initiatives.

CORE COMPETENCIES

Strategic Planning • Business Transformation • Operational Design • Cross-Functional Leadership • Professional Services • Organizational Enablement • Customer Experience • Change Management

EXPERIENCE

Compliance and Risks

SEP 2022 – Present

Customer Success Senior Team Lead (US) • Remote

- Leads U.S. Customer Success and Professional Services operations supporting \$16M+ ARR, working closely with enterprise customers and serving as a trusted advisor to multiple Fortune 50 organizations.
- Selected for the company's 12-member Extended Leadership Team, contributing to company-wide planning and goal setting. Personally created the company's guiding principles for cultural transformation in response to AI disruption.
- Built the first renewal playbooks, capacity planning framework, and day-to-day operating processes for the Customer Success team while redesigning workflows in Gainsight to make the team's work more consistent and easier to manage.
- Built cross-functional processes spanning Sales handoffs, customer reviews, renewals, and planning to improve coordination between teams and create clearer account ownership and as the business scaled.
- Established Gainsight as a single source of truth across the organization by implementing integrations with HubSpot, Salesloft, and video conferencing tools. Built dashboards and AI agents used by leadership to track renewals and provide more accurate customer health and risk signals.
- Led customer workshops and executive roundtables across North America, Europe, and Asia, helping enterprise customers connect product capabilities to their own operational and compliance challenges.
- Built and delivered Jobs to Be Done training, role plays, and supporting documentation for the Customer Success team to improve how customer problems were identified, success was measured, and engagements were structured.
- Selected to lead the initial customer migration program from a legacy platform to the company's new native AI platform, working with early adopters to identify operational challenges, document lessons learned, and draft the migration plan for broader rollout.

Cosmos

AUG 2025 – Present

Founder • Atlanta, GA

- Designed and built a social platform connecting people through shared live events, from initial concept through launch.
- Defined product requirements, built the application using AI-assisted development tools, and integrated third-party services including authentication, payments, mapping, and event data.
- Established analytics, moderation workflows, and operational processes while iterating based on testing and user feedback.

Experian Employer Services

AUG 2019 – SEP 2022

Senior Implementation Manager • Remote

- Managed 30+ high-complexity SaaS implementations each year across tax and employment verification products for Fortune 1000 customers.
- Led the migration of the implementation team's Salesforce CRM, preserving data integrity while reducing support inquiries by 10%.
- Coordinated launches involving APIs, SFTP integrations, and external vendor partnerships, working across technical and customer-facing teams to keep complex projects on track.

- Created templates, decks, internal documentation, training materials, and customer-facing resources to standardize implementation of a newly acquired SaaS platform across the broader Experian organization.
- Worked with Sales and Customer Success to incorporate expansion discovery into implementation, creating a smoother path from initial sale to long-term account growth.

NAVEX Global

FEB 2018 – AUG 2019

Implementation Manager • Peachtree Corners, GA

- Delivered 125+ learning management system implementations for enterprise customers while maintaining 98% CSAT and 150% delivery efficiency.
- Advised Fortune 1000 organizations on compliance configuration and implementation strategy, helping translate business requirements into practical platform solutions.
- Worked with customers to uncover expansion opportunities through implementation discussions and solution reviews, partnering with Sales on follow-on opportunities.
- Acted as the technical liaison for complex SSO and SCORM integrations, working across Support and Product to troubleshoot issues and keep customer projects moving.

YP (The Real Yellow Pages)

MAY 2013 – DEC 2017

Integrated Media Producer • Tucker, GA

- Advised SMB and enterprise customers on digital marketing strategy, translating business goals into practical advertising campaigns, websites, and content that helped them grow their businesses.
- Led onsite training in India to improve offshore production quality and design consistency, increasing accuracy to 95% within the first 30 days.
- Created internal product guides and best-practice documentation adopted across departments and recognized with internal awards including Business Transformer and Most Valuable Teammate.

Education

- Georgia State University, B.A. in Sociology & Psychology (Advanced Honors)

Certifications

- Professional Scrum Master I (2020–Present) • Lovable Vibe Coding (L4 Platinum)