

AYAAN AHMED ANSARI

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PROFESSIONAL SUMMARY

Customer Success Manager with **3+ years** owning B2B SaaS and ERP accounts from onboarding through renewal, driving adoption, retention, and expansion. Proven impact: **90%+ module adoption** across **30+ accounts**, **95% client retention** on UK, India and UAE portfolios, **40% faster go-lives**, and **30% fewer stalled implementations** through account health tracking, early churn-risk intervention, and structured customer reviews. Works daily in HubSpot and JIRA, applies AI to CS workflows with Claude Code, and founded [Folio Studio](#), an AI-assisted web studio with **10+ live client sites**.

PROFESSIONAL EXPERIENCE

Functional Consultant & Customer Success Manager

Dec 2024 – Present

TranZact (FCB Technologies Pvt Ltd)

- Owned onboarding, adoption, and ongoing account health for a book of 30+ B2B SaaS and ERP accounts, achieving 90%+ module adoption by managing delivery end to end from requirements gathering, BRD/FSD documentation, through configuration, UAT, and go-live.
- Retained and grew accounts from onboarding through renewal, delivering 100+ structured training sessions, tracking account health to act early on churn risk, and surfacing expansion opportunities on healthy accounts to the sales team.
- Recovered at-risk accounts as their trusted advisor, cutting go-live timelines by up to 40% through root-cause analysis, milestone-based recovery roadmaps, and clear stakeholder account updates.
- Reduced stalled implementations by 30% by bringing customer feedback back to product and leadership as user stories and PRDs, tracking delivery in JIRA, and coordinating Odoo API integrations and system integration testing.

Analyst, Account Manager (Client Operations & Business Analysis)

May 2023 – Dec 2024

Gallagher Service Centre

- Sustained 95% client retention across a portfolio of global UK and UAE accounts by owning SLA monitoring, escalation management, and structured change request handling in a US/UK time-zone overlap environment.
- Cut query resolution turnaround by 30% with a centralized Query Log tracking system (Kaizen certified) and reduced client onboarding time by 40% by authoring SOPs and delivering structured end-user training.
- Ran account reviews and shared clear updates with client stakeholders, acting as liaison between customers, IT, and operations to gather feedback and drive alignment on solutions.

Executive, Financial Operations (Internship)

May 2022 – May 2023

G.P. Kapadia & Co.

- Managed end-to-end AP/AR and General Ledger entries with high accuracy across 40+ government and corporate client files, coordinating validation of client financial profiles for regulatory banking applications.

KEY PROJECTS

- Red Health Accounts Turnaround Program:** Built a four-root-cause account health framework with a recovery playbook per category; diagnosed 100+ stalled accounts across CSMs and consultants, driving 30% fewer at-risk accounts in a quarter.
- TranZact Modules Knowledge Base:** Authored a client-facing module manual with the co-founder and design team, used to train the chat-support AI and accelerate customer onboarding.

CORE SKILLS

Customer Success: Customer lifecycle management, onboarding, adoption, account health tracking, churn risk mitigation, renewals, expansion opportunity identification, QBRs, NPS/CSAT, escalation management

CRM & Success Tools: HubSpot, JIRA, Notion, Power BI dashboards, Looker Studio, Excel (Advanced), SQL (basic)

Implementation & Delivery: End-to-end SaaS/ERP onboarding, requirements gathering, BRD/FSD documentation, UAT, go-live, SLA management, Odoo API integrations

AI & Collaboration: Claude Code, LLM-assisted workflows, prompt engineering, cross-functional partnership with Product, Sales, IT, and Operations, remote-ready setup

CERTIFICATIONS

- Enterprise Product Management (Microsoft)
- Claude Code AI (Anthropic)
- Power BI Essential Training
- Kaizen (Lean Process Improvement)
- SAP S/4HANA FICO

EDUCATION

Education: B. Com (Finance & Accounting), Lala Lajpat Rai College of Commerce & Economics, Mumbai University, 2019–2022

Languages: English, Hindi, Urdu, Marathi