

JIM TAUER

Customer Success, Support & Training Executive

Minneapolis–St. Paul, MN | 612-670-4308 | jimtauer71@gmail.com | linkedin.com/in/jimtauer

PROFESSIONAL SUMMARY

Customer Success, Support, and Training executive with 15+ years building and scaling customer-facing organizations for multi-product SaaS platforms serving SMB, mid-market, and enterprise customers. Proven track record designing Customer Success functions from the ground up, driving CSAT and retention, and leading teams across support operations, onboarding, and education. Trusted executive escalation point and cross-functional partner to Product, Engineering, and Sales in Agile environments. Actively applies AI-enabled tools to improve support operations, customer data visibility, and churn prevention.

CAREER HIGHLIGHTS

- **CSAT Turnaround:** Improved customer satisfaction to 98% CSAT within six months through team mentoring, workflow redesign, and quality assurance standards.
- **Built the CS Function:** Designed and launched the company's Customer Success Manager (CSM) function from scratch — role definition, hiring, onboarding, and success metrics — shifting Customer Success from a cost center to a revenue-generating function.
- **Onboarding Efficiency:** Reengineered onboarding and training programs, reducing onboarding time by roughly 50% while lifting customer satisfaction scores by 30%.
- **Scale & AI Enablement:** Now lead a combined Support, Success, and Training organization of up to 8 direct reports handling 500+ multi-channel inquiries monthly, and use AI-powered tooling to increase customer data visibility and get ahead of churn risk.

CORE SKILLS

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|-------------------------------|-------------------------------------|
| • Customer Success Leadership | • Retention & Churn Prevention |
| • Customer Support Operations | • Knowledge Base & Training Systems |
| • Team Building & Mentoring | • SaaS Operations |
| • Escalation Management | • Agile Methodology |
| • Onboarding & Enablement | • Cross-Functional Collaboration |
| • CSAT / Quality Assurance | • AI-Enabled CS/Support Workflows |
| • Voice of the Customer (VoC) | • Renewal & Upsell Strategy |

PROFESSIONAL EXPERIENCE

Director, Customer Solutions *April 2018 – Present*

Aquent Cloud (RoboHead) | Minneapolis, MN (Remote)

- Lead Customer Support, Customer Success, and Training teams (up to 8 direct reports) for a multi-product SaaS platform serving a mixed SMB, mid-market, and enterprise customer base.
- Own day-to-day customer support operations, including staffing, workflow design, escalations, quality assurance, and customer communications.
- Serve as senior executive escalation point for high-impact customer issues, ensuring timely resolution and executive-level communication.
- Improved customer satisfaction to 98% CSAT within six months through team mentoring, workflow refinement, and new QA standards.
- Designed and launched the company's Customer Success Manager (CSM) role — including role definition, hiring, onboarding, and success metrics — transitioning Customer Success from a cost center to a revenue-generating function focused on upsell and professional services.

- Established scalable onboarding and education programs, including structured video-based training content, reducing repeat support inquiries and improving time-to-value.
- Partnered closely with Product and Engineering to translate customer feedback into roadmap improvements, and supported Sales and Account Management with product expertise, demos, and enablement.
- Developed an AI-powered system to increase visibility into customer data and support proactive churn prevention.

Director, Training *January 2014 – March 2018*

Aquent Cloud (RoboHead) | Minneapolis, MN (Hybrid)

- Built the training team from the ground up, growing headcount from 1 to 4 within six months.
- Hired, trained, mentored, and managed a team of Training Specialists supporting onboarding and ongoing customer education.
- Sourced, implemented, and authored a comprehensive online help and knowledge base system for the company's core SaaS product, reducing repetitive support requests.
- Reorganized onboarding and training processes for new clients, increasing average customer satisfaction scores by 30%.
- Served as internal subject-matter expert for Support, Sales, and Product teams.

Training Manager *January 2009 – December 2013*

Aquent Cloud (RoboHead) | Minneapolis, MN

- Trained and onboarded a growing client base across four SaaS platforms, serving as the go-to product expert for clients and internal teams.
- Led training and retention efforts for existing clients, delivering sessions via GoToMeeting and WebEx.
- Trained and consulted with clients on-site worldwide, traveling approximately 1–3 days per month.
- Conducted two product training webinars per month highlighting new and existing features.
- Recognized with the company's "Superstar" Award, June 2010.

ADDITIONAL EXPERIENCE

Direct Marketing Account Representative, IC System *January 2008 – December 2008*

St. Paul, MN — Managed 250+ direct marketing projects annually across multiple vendors and oversaw CRM data integrity, reporting, and analytics.

Client Manager, CMS Direct *March 2007 – December 2007*

Stillwater, MN — Promoted three times while supporting data processing and research operations.

Account Analyst & Technical Analyst, Merkle Inc. *May 2000 – January 2007*

Lanham, MD — Led data processing and analytics projects for enterprise direct marketing clients (including Nike and Disney); migrated a major client from mainframe to automated SQL Server processing and implemented a postal analysis system saving ~\$40K per month. Recognized as Employee of the Month, December 2000.

Client Services Manager & Project Manager, IC System *October 1996 – April 2000*

St. Paul, MN — Managed a team of nine account managers and programmers; launched and scaled the company's first call center service offering (clients included Starbucks, Helzberg Diamonds, and GE Capital).

Project Director / Data Specialist / Data Processor, Readex Research *April 1994 – September 1996*

Stillwater, MN — Promoted three times while supporting data processing and research operations.

EDUCATION

Bachelor of Arts — University of Minnesota - Duluth, Duluth, MN

CERTIFICATIONS & PROFESSIONAL DEVELOPMENT

- **Generative AI for Productivity** — Cornell University

- **AI Agents for Business** — University of St. Thomas
- **Business Applications of AI** — University of St. Thomas
- **Agile Project Management Certificate (UST-CAP)** — University of St. Thomas
- **Mini MBA** — University of St. Thomas
- **Mini Master of Project Management** — University of St. Thomas
- **Foundations, Focus & Build Certifications** — Pragmatic Marketing