

Ivan du Plessis

Customer Success Manager / Onboarding Specialist | 📍 Southeast Asia-based | Open to APAC & EMEA Roles

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PROFESSIONAL SUMMARY

Client-focused and detail-oriented professional with experience supporting SaaS and service-based businesses in onboarding, customer success, and account management. Skilled in guiding 30+ clients per month through implementation, resolving technical issues, and improving adoption across fitness, dental, SaaS, and e-commerce industries. Adept at creating training materials, streamlining workflows, and driving measurable improvements in client satisfaction and retention. Seeking a mentorship under a senior Customer Success Manager to master onboarding, retention strategies, and account management workflows.

WORK EXPERIENCE

Digital Biz Leads

Atlanta, GA + Miami, FL

Customer Success Specialist | Onboarding Coordinator

Jan 2023 – Present

- Guided 30+ clients per month through website setup, CRM integration, and workflow implementation, accelerating adoption by 30%.
- Created step-by-step tutorials, video walkthroughs, and documentation, ensuring clients fully understood and successfully used systems.
- Monitored client accounts and resolved technical and operational issues proactively, boosting satisfaction metrics and retention.

She Reigns Creative

New York, NY + California, CA

Cold Email Marketing | Lead Generation Specialist

Jul 2022 - Dec 2022

- Implemented client onboarding for campaigns, email sequences, and landing pages, ensuring smooth adoption of agency services.
- Conducted client training sessions and provided ongoing support, increasing booked appointments and engagement by 20%.
- Collected client feedback and designed repeatable onboarding templates, reducing setup time and improving workflow consistency.

Whatagraph

Vilnius, Europe

Account Executive / Tech Support

Jan 2022 - June 2022

- Conducted 5+ daily demo and onboarding calls for APAC clients, educating users on SaaS features and adoption best practices, resulting in higher adoption rates.
- Resolved technical and workflow issues via Slack, Zoom, and Intercom, improving client satisfaction and follow-through.
- Streamlined client support processes using internal tech tools, increasing efficiency and workflow visibility.

Kitchen Bedroom Gallery (family business)

Johannesburg, South Africa

Sales Manager | Marketing Operations Specialist

Jan 2010- Dec 2021

- Managed a 15-person sales team across 10 showrooms, optimizing onboarding and follow-ups to maintain high client satisfaction and repeat business.
- Developed standardized training materials, scripts, and visual guides, improving client interactions and service adoption.
- Optimized communication and tracking systems, increasing client loyalty and operational efficiency by 20%.

SKILLS & SYSTEMS

- **Customer Success Tools:** GoHighLevel CRM, Salesforce, Zendesk, Intercom, Whatagraph Analytics, HubSpot
- **Technical & Onboarding Systems:** WordPress, Elementor Pro, ClickFunnels, Google Workspace, Slack, Trello, Notion, Zoom, Loom
- **Core Competencies:** Client Onboarding • Account Management • Customer Training & Enablement • Process Documentation • Workflow Optimization • Churn Management • Cross-Team Collaboration • Customer Retention Strategies • SaaS Adoption Tracking
- **Soft Skills:** Detail-Oriented • Analytical Thinking • Creative Problem Solving • Proactive Communication • Adaptability • Time Management • Growth Mindset

CAREER GOAL

To train under an experienced Senior Customer Success Manager, mastering client onboarding, retention strategies, and account management workflows — and transition into a full-time Customer Success Manager / Onboarding Specialist role responsible for delivering seamless client experiences.