SHUBHAM BHARDWAJ

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Customer Success Manager | Platform Operations & Technical Account Management

PROFESSIONAL SUMMARY

Technical Customer Success and Platform Operations Specialist with 7+ years driving onboarding, platform adoption, and account health across scaled enterprise SaaS portfolios. At Salesforce, managed health and enablement for 1,041+ accounts across global enterprise clients (average client company revenue ~$5.4B, ~50% Enterprise-tier) through structured 30/60/90-day onboarding frameworks, sustaining 95.8% CSAT and a 75% Customer Acceptance Rate. Functional owner for enterprise platform migrations (Hyperforce, Agentforce, Data Cloud), aligning Product, Engineering, and client teams to eliminate technical churn risk. Proven background spanning business analysis, cross-CRM administration (Salesforce, Microsoft Dynamics 365), and operational SLA governance.

CORE SKILLS

- **Customer Success & Account Health:** End-to-End Onboarding, Account Health Monitoring, Retention & Adoption Strategy, CSAT Optimization, Escalation Management, User Acceptance Testing (UAT)
- **Operations & Process Governance:** CS Operations (CS Ops), High-Volume Scaled Portfolio Management, Severity-Tiered (P1–P4) Escalation Design, SLA Management, SOP Documentation, KPI Tracking, Continuous Improvement
- **Functional & Technical Architecture:** Business Analysis, Requirement Elicitation, Process Mapping, Agile & Scrum Methodologies, XML/JSON Data Hand-Offs
- **Platforms & Tooling:** Salesforce Service Cloud, Microsoft Dynamics 365, Platform Migrations (Hyperforce, Agentforce, Data Cloud, MIAW), AppExchange Tooling (360 SMS, 360 CTI, Conga-DocGen)

CERTIFICATIONS

- Salesforce Certified Agentforce Specialist
- Salesforce Certified Data Cloud Consultant
- Salesforce Certified Sales Cloud Consultant
- Salesforce Certified Administrator & Salesforce Certified Associate

PROFESSIONAL EXPERIENCE

HSBC

Client Platform Operations Specialist (Job Grade: Manager) | July 2026 – September 2026

- Managed sales platform administration and CRM operations on Microsoft Dynamics 365, supporting regional sales stakeholders to streamline pipeline tracking and user workflows.
- Evaluated platform configuration requirements and cross-CRM integration touchpoints, applying multi-system expertise across Salesforce and Dynamics 365 ecosystems.
- Standardized day-to-day administrative support workflows to ensure high data integrity and prompt SLA turnaround for front-office users.

Salesforce Com India Private Ltd.

Customer Success Manager – Operations | April 2023 – June 2026

- Managed account health and technical adoption across a scaled portfolio of 1,041+ enterprise and mid-market accounts (average client company revenue ~$5.4B, ~50% Enterprise-tier), achieving 95.8% CSAT with zero dissatisfied responses.
- Partnered cross-functionally with Account Executives and Renewal Managers to de-risk renewals and secure retention by driving adoption through structured 30/60/90-day alignment check-ins.
- Attained a 75% Customer Acceptance Rate and optimized complex escalation pipelines, bringing average resolution turnaround to ~21 days across high-touch enterprise onboarding and platform-migration cases.
- Served as functional lead on company-wide migrations (Hyperforce, Agentforce, Data Cloud, MIAW/LiveAgent), bridging Engineering, Product, and executive client stakeholders to prevent platform downtime and eliminate migration-related churn.
- Spearheaded department-wide process standardization by designing Conga-DocGen outreach templates utilized across high-complexity case queues — nominated for the #WowMoments Innovator Award (2026).
- Selected for the competitive Salesforce Accelerate Program (2025) for high-potential client-facing talent.

KCloud Technologies Pvt Ltd.

Salesforce Business Analyst | May 2022 – April 2023

- Elicited and translated client requirements into functional specifications and process maps for 10+ enterprise cloud projects, improving delivery accuracy and reducing rework.
- Served as lead functional BA on a legal-sector platform implementation, mapping business logic and XML/JSON data flows to integrate Salesforce with two external client systems.
- Strengthened client adoption and sign-off rates by leading system demos, UAT deployment, and end-user training programs.
- Kept delivery on-track by running daily Scrum ceremonies, sprint planning, and reviews across developer, QA, and PM teams.

360 Degree Cloud Technologies Pvt Ltd.

Salesforce Administrator cum Business Analyst | September 2020 – May 2022

- Reduced customer churn risk by resolving a high-volume post-sales support queue for AppExchange products (360 SMS, 360 CTI), troubleshooting complex configuration issues to restore product utility.
- Lowered onboarding-related churn by delivering structured configuration support and onboarding tracks for new accounts.
- Closed the feedback loop between customers and product by relaying customer-reported bugs and UX issues to internal development teams, contributing to product improvements.

DruArts

Business Development Executive | August 2019 – September 2020

- Grew revenue by consistently exceeding sales targets through retention and account expansion initiatives across an existing customer base.
- Reduced client churn by implementing proactive retention strategies, building trusted-advisor relationships with a diverse customer portfolio.
- Owned the full business development cycle — lead generation, qualification, negotiation, and onboarding — for new client acquisition.

KEY PROJECTS

- **Enterprise Onboarding Playbook:** Designed a standardized 30/60/90-day onboarding framework defining milestones, ownership, and success criteria at each stage, creating a reusable model for consistent onboarding delivery across accounts.
- **Cross-System Data Integration (Litify / Salesforce):** Acted as functional liaison between developers and a legal-sector client to build a custom Salesforce component supporting case data and attachments up to 10MB; coordinated a JSON-to-XML, identifier-based data hand-off to external servers with no direct system access.
- **Escalation & SLA Management SOP:** Formalized a severity-tiered (P1–P4) escalation framework with defined response/resolution SLAs and client communication standards, codifying practices that reduced average Time to Resolution to ~21 days.

EDUCATION & RECOGNITION

- B.Tech, Computer Science & Engineering | Dr. APJ Abdul Kalam Technical University (2016 – 2020)
- Salesforce Trailhead: Triple Star Ranger (300+ Badges, 150,000+ points)