

STEFANIE N. BRADY

DIRECTOR OF CLIENT SUCCESS

Visionary Leader

Before you are a leader, success is all about growing yourself. When you become a leader, success is all about growing others. Become the best kind of leader that people would follow voluntarily, even if you had no title or position. I start with the premise that the function of leadership is to produce more leaders, not more followers.

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SKILLS

- Technical Proficiency with Text, Email, and Chat Messaging Platforms
- Multi-Site Operations Management
- Travel Logistics Planning
- Site Performance Evaluation
- Cross-Functional Collaboration
- Vender Relations
- Proficient in PowerBI, Power Automate, and PowerApps
- Manage Business Risk and preventative measures.
- Proficient in diverse research, analytics, and data management methodologies
- State Regulator Complaint Resolution
- Better Business Bureau Complaint Handling
- Social Media Review Management
- Regulatory Compliance
- Conflict Resolution
- Adaptable to Diverse Environments
- Emotional Intelligence
- Customer Satisfaction Enhancement
- Technology Integration
- Project Management

EXPERTISE

- Expanded the Text, Email, Chat (TEC) team at American First Finance from 7 to 260 full-time employees across four locations by establishing job descriptions, systems, and policies & procedures for the department.
- Expanded the call center operations from a single site to a global presence with four strategically positioned sites across the world, enhancing organizational reach and ensuring efficient and responsive service.
- Enhanced customer communication channels by expanding to include email and text messaging, ensuring a versatile and efficient approach to addressing customer concerns.
- Developed digital training modules resulting in a 40% reduction in overall training duration, optimizing the learning process for increased efficiency and effectiveness.
- Implemented a customer complaint portal, leading to a 30% reduction in response time to consumer complaints within the initial 30 days of deployment.
- Achieved cost reduction by outsourcing 75% of our workforce, optimizing operational expenses while maintaining efficiency and productivity.
- Established site performance scorecard's incorporating comprehensive performance matrices to evaluate and enhance overall operation efficiency.
- Created an analytical framework for trend reporting and root cause analysis of customer complaints.
- Successfully developed and implemented an intranet SharePoint site for the company.
- Superior interpersonal skills as a liaison between multiple Mortgage, Auto Finance, and Credit Card servicing clients.
- Developed an innovative IVR system to not only improve customer experience but also enhance data reporting capabilities.

ACTIVITIES AND INTERESTS

- Hiking
- Nature
- Family
- Travel
- Foodie
- Volunteering
- Photography
- Documentaries

EDUCATION

- **High Scholl Diploma** Sacramento, CA
- **Project Management** University of North Texas
- **Leadership and Development Certificate** Stagen Foundational Leadership Graduate

WORK EXPERIENCE

Client Success Director

ONC National | Dallas, TX

2024 – Current

- Led the Client Success development and implementation of an intranet SharePoint site for the company, resulting in improved communication, collaboration, and information sharing among employees.
- Build and maintain strong relationships with key clients. Act as the main point of contact for clients, understanding their needs, challenges, and objectives.
- Develop and execute account plans to drive client retention and expansion. Monitor client accounts, proactively identifying opportunities for upselling or cross-selling additional products or services.
- Coordinate with internal teams, such as customer support, to address client concerns and resolve issues in a timely manner.
- Gather feedback from clients through surveys, interviews, or regular check-ins. Use this feedback to improve products or services and enhance the overall client experience.
- Work closely with sales, marketing, and product teams to develop strategies for client success and growth. Provide insights into market trends and client needs to inform product development and marketing initiatives.
- Define key performance indicators (KPIs) for client success and track progress against goals. Provide regular reports to senior management on client engagement, satisfaction, and revenue growth.

Director of Customer Advocacy

American First Finance | Dallas, TX

2018 – 2024

- Led a team of 2 managers and 15 technical support staff providing customer support via text, email, and chat. Over 1.5 years, expanded the department to 265 support staff across 4 different sites.
- Established TEC team system process flow through LiveVox Manager.
- Develop and implement cost-effective training and support solutions to improve productivity, streamline operations, and enable faster access to critical information.
- Managed Complaint Handling processes across four countries as the focal point of my role.
- Owner of the Complaint Management Committee, overseeing and leading initiatives to effectively address and resolve customer complaints, ensuring a proactive and customer-centric approach to conflict resolution.
- Accountable for handling complaints from state regulators, Better Business Bureau, and monitoring and responding to social media reviews to uphold the company's reputation and customer satisfaction.
- Manage risk and creating preventative measures to ensure a seamless and secure experience for our customers.
- Implemented automation for the complaint remediation process, leading to the immediate resolution of high-risk complaints and a subsequent 20% reduction in regulatory complaints.

Assistance Vice President – Operations Support

National Bankruptcy Services | Dallas, TX.

2014 - 2018

- Spearheaded the Call Center Department and the Motion for Relief Department.
- Implemented policies and procedures to enhance customer satisfaction.
- Implemented a Management Leadership and Development Program, resulting in a 9% decrease in overall employee turnover and a subsequent reduction in company expenses.