



Oliver Chen

Customer Success Lead

Summary

Customer Success Lead with eight years of experience in customer success and adoption. Combines thoughtful problem solving with hands-on delivery, clear communication and a strong focus on measurable outcomes. Trusted partner to multidisciplinary teams, with a track record of turning complex challenges into practical improvements for customers and colleagues.

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Experience

Evergreen Software

Vancouver, Canada

Customer Success Lead

2022 – Present

- Led a team of six customer success managers supporting 140 business accounts and CAD 12m in recurring revenue.
- Introduced outcome-based account plans that increased net revenue retention from 106% to 119%.
- Built a risk review programme combining product signals and customer feedback to improve renewal confidence.

Anchor Systems

Vancouver, Canada

Customer Success Specialist

2019 – 2022

- Managed onboarding and expansion for a portfolio of 45 accounts across retail, media and professional services.
- Created practical training resources and office hours that reduced time to first value by 32%.
- Partnered with product teams to prioritise customer feedback and close the loop on high-impact improvements.

Westbridge Partners

Vancouver, Canada

Associate, Customer success and adoption

2017 – 2019

- Supported client projects from research and planning through delivery, building a strong foundation in customer success and adoption.
- Maintained accurate project documentation, coordinated stakeholder feedback and presented clear recommendations to senior colleagues.

Projects

Customer Academy

2025

Built role-based learning paths and live workshops for customer administrators. Programme reached 1,200 learners and improved feature adoption by 23%.

Team Knowledge & Practice Library

2024

Developed practical templates, examples and onboarding resources for customer success and adoption. Shared lessons through monthly peer sessions and made proven approaches easier to reuse.

Renewal Readiness Programme

2023

Created a structured renewal journey with clear milestones, shared success measures and executive check-ins. Helped account teams identify risks earlier and give customers a clear view of the value achieved.

Skills

Customer success

Account planning, Adoption strategy, Renewals

Collaboration

Executive reviews, Enablement, Voice of customer

Systems

Salesforce, Gainsight, Zendesk

Education

Simon Fraser University

BA

Business Administration

2013 – 2017

Focused on applied research, collaborative projects and professional practice. Final project explored evidence-led approaches to customer success and adoption.

Certifications

Certified Customer Success Manager

2024

SuccessCOACHING

Languages

English

Fluent

Portuguese

Conversational

Community

Community Skills Network

2023 – Present

Coach newcomers through job search, professional networking and workplace communication workshops.

Interests

Mountain hiking