

# Meg Kennedy

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## PROFESSIONAL SUMMARY

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Client success and operations manager with 11 years at Tom Ferry, a real estate coaching and SaaS company, across five distinct roles from client success rep to second-line manager. Leads a CS team, served as business analyst on a company-wide systems rebuild, and builds working tools with AI for her team. Strongest at finding where a customer journey is breaking, proving it with data, and getting the right team to fix it.

## EXPERIENCE

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### **Manager, Client Success & Operations** | Ferry Intl. LLC (Tom Ferry) *May 2023 – Present*

- Lead a team of 8, including 2 supervisors, with operational oversight for a department of 40.
- Help hold churn below 5% as part of CS leadership for a 5,000-member coaching base.
- Own onboarding and placement for about 100 new coaching and SaaS clients a month, from signed contract through handoff.
- Sole manager for Pivot, a 350-subscriber webinar product; supervise a part-time team member on check-in calls and tier 1 support, and own tier 2.
- Pulled Pivot support cases and voicemail transcripts into a Claude-assisted analysis that traced recurring login failures to how Zoom webinars were set up; made the case to the content team, and login issues dropped immediately after the change.
- Proposed a recommended template to fix low coach adoption of pre-session forms; once product built it, presented it to coaches on a webinar. 26 of the 56 coaches using the feature now use the template, nearly doubling adoption.
- Internal business analyst on a company-wide rebuild of Salesforce, HubSpot, Five9, Shopify, Stripe, Absorb LMS, the website, and the member SaaS product; defined requirements and ran acceptance testing for a 60-user Five9 deployment, with routing and IVR built around why clients actually called.
- Built an automated weekly QA review with Claude that pulls call transcripts and Salesforce case data, flags the interactions most worth coaching on, and delivers a report with a Slack summary; it surfaced a recurring sales-to-CS handoff problem across two teams.
- Serve as primary technical escalation point across the business; standardized client communication templates, SLAs, and escalation workflows.
- Lead the Summit livestream support team each year, training staff with varied technical skills to support 3,000+ attendees.

### **Digital Support Supervisor** | Ferry Intl. LLC (Tom Ferry) *February 2022 – May 2023*

- Supervised SaaS support operations and QA for a team of 4-6; developed SLA frameworks and trained the team in SLA-driven communication.
- Managed the client-facing ticket queue in Jira, routing escalations and documenting bugs for product team review.

### **Product Support Lead** | Ferry Intl. LLC (Tom Ferry) *August 2018 – February 2022*

- Acted as liaison between support and product, channeling user feedback into the development cycle.
- Provided tier 2 SaaS support, resolving complex account, billing, and technical issues.
- Led the move of coaching sessions from phone to Zoom (2018-2019), supporting coaches and clients through the change and writing the documentation to ease adoption.

### **Operations Analyst** | Ferry Intl. LLC (Tom Ferry) *August 2017 – August 2018*

- Built executive-level Salesforce dashboards and KPI reports used to drive business decisions.
- Analyzed contractor coaching program performance data; findings directly informed retention strategy.

**Lead Client Success Representative** | Ferry Intl. LLC (Tom Ferry) *January 2015 – August 2017*

- Managed client accounts, renewals, billing, and first-level escalations; promoted from Representative to Lead in March 2017.
- Documented department processes and wrote the team manual; built and monitored Salesforce performance reports.

**Operations Team Leader (Asst. Store Manager)** | Jo-Ann Stores LLC *April 2009 – January 2015*

- Ran daily operations for a team of 25-30; stepped into Acting Store Manager during the 2011 holiday season after an abrupt management departure.

## PROJECTS

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**Scheda: Class Registration Platform** | [scheda.sca-caid.org](https://scheda.sca-caid.org) *Launched 2026*

- Designed and built, with Claude, a class registration platform for a nonprofit of about 1,200 members: WordPress front end, Google Sheets back end, Apps Script automation. Includes returning-teacher profiles, waitlists, volunteer scheduling, and steward reporting; live for its first major event.

**Brambletally** | [brambletally.com](https://brambletally.com) *2026*

- Designed and built, with Claude, a project-tracking web app for makers; live and open to the public.

## SKILLS & PROFICIENCIES

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**Systems & Tools:** Salesforce CRM and Service Cloud (11 yrs), Jira (6 yrs), HubSpot, Five9, Absorb LMS, Shopify, Stripe, Google Apps Script, WordPress, Claude, ChatGPT

**Core Competencies:** Team leadership and coaching, client onboarding, escalation management, SLA design, process documentation, new hire ramp programs, QA oversight, KPI tracking and reporting

**Operations & Project Work:** Enterprise system coordination, requirements gathering, acceptance testing, vendor and contractor management, cross-functional project management, change management, post-launch monitoring

**Support Specialization:** SaaS technical support, client retention, de-escalation, voice-of-customer feedback loops, AI product support, AI-assisted QA

## VOLUNTEER LEADERSHIP

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**Kingdom Chatelaine** | Society for Creative Anachronism (SCA), Kingdom of Caid *2024 – Present*

- Lead recruitment, newcomer onboarding, and volunteer officer teams for a 501(c)(3) historical education nonprofit of about 1,200 members.

**Event Lead, WorldCon (LAcon V)** | SCA Kingdom of Caid *August 2026*

- Ran the SCA's five-day presence at the Anaheim Convention Center, coordinating nearly 70 volunteers across a makerspace, fan table, live combat demo, and panel; handled scheduling, insurance, and floor planning.

## EDUCATION

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CSU Transfer Certification (AA equivalent), Psychology | Irvine Valley College