

# Max Weiner

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Customer Success leader with 10+ years managing enterprise portfolios up to \$18M ARR across SaaS/PaaS organizations. Known for growing strategic accounts, building CS infrastructure from scratch (churn prediction models, health monitoring programs, customer journey playbooks), and driving 100% gross retention and 120%+ NRR across startups and public companies while working with complex Fortune 500 clients.

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## PROFESSIONAL EXPERIENCE

### Senior Customer Success Manager | Cloudflare | September 2025 - May 2026

- Grew a Fortune 10 account from \$1.6M to \$5.5M ARR by aligning cross-functional stakeholders, maturing operational workflows, and driving executive engagement over an 8-month period.
- Maintained 100% retention across a portfolio of 8 enterprise accounts representing \$18M+ ARR, managing complex stakeholder environments with 5–20+ decision-makers per account.
- Created a value-realization framework and customer-facing metrics deck used across 10+ Executive Business Reviews, generating \$2.5M+ in CS-qualified pipeline and later adopted as a standard across the Majors team.
- Partnered with the Data team to build a customer-facing billing and usage portal for a Fortune 10 account, improving customer experience and serving as the beta model for enterprise accounts.
- Spearheaded the AI Hackathon for the CS Department and led an AI-assisted initiative that replaced the external project management tool for 1,000+ users, eliminating ~\$180K in annual software spend.

### Manager of Customer Success Strategy | Appian Corporation | July 2023 - September 2025

- Reduced churn by ~2% across a global customer base of 1,100 accounts representing \$500M+ ARR by building and operationalizing customer health frameworks, risk language, escalation playbooks, and cross-functional reporting.
- Led a 3-person team (2 analysts, 1 data scientist) to develop and optimize 9 customer health monitoring tools, including a churn prediction model with 87% accuracy, that retained \$15M+ ARR through early intervention with technical tiger teams across 25 enterprise customers.
- Created a Churn Retrospective Program capturing insights from 200+ customer interviews, producing 8 biannual leadership reports and enabling dozens of internal enablement sessions to systematically reduce future churn.
- Recognized with Collaboration Award and Impact Award for driving cross-organization effort and the adoption of customer health monitoring tools across global teams and 300+ go-to-market colleagues.

### Customer Success Manager – Strategics | Appian Corporation | April 2021 - July 2023

- Achieved 120%+ NRR across strategic book of business consisting of 6 enterprise customers across Financial Services, Life Sciences, and Supply Chain verticals, representing \$15M+ ARR and driving \$1M+ in additional professional services.
- Expanded platform adoption by 2,000+ users by identifying new use cases, aligning executive stakeholders, and driving high-touch engagement including success planning, business reviews, and cadence calls.
- Selected as the team's Gainsight product liaison, building 10+ CSM playbooks, dashboards, and operating frameworks that reduced onboarding time and improved team consistency.
- Received 2 Impact Awards recognizing distinct contributions: redesigning the CSM onboarding curriculum and leading a client-facing process mining/AI initiative that eliminated \$2M+ annually in cycle time for a Fortune 50 customer.

## **Senior Customer Success Manager** | ID.me | June 2020 - April 2021

- Achieved 100% retention across 50 enterprise customers representing \$5.5M+ ARR while driving \$100K+ in upsell revenue.
- Led a \$1M strategic pilot with Fidelity Investments as one of the company's highest-priority expansion opportunities, partnering directly with executive leadership, Product, and Engineering on a highly customized enterprise use case.
- Developed a playbook and internal operating processes to enable 100% account coverage and grow the team from 2 to 7 CSMs.

## **Manager of Customer Success** | XAPPmedia, Inc. | July 2017 - August 2019

- Scaled Customer Success from 20 to 120+ customers representing \$700K+ ARR while managing a team of 3 and overseeing delivery of 1,000+ voice applications.
- Led department to "Excellent" Net Promoter Score across customer base ranging from enterprise to small media markets.
- Partnered directly with the Chief Product Officer to prioritize roadmap initiatives, develop JIRA user stories, and drive platform improvements through customer feedback for 300+ platform users.
- Brokered a strategic partnership between Amazon and Westwood One that generated 1M+ impressions during NCAA March Madness and earned an Amazon Alexa Innovation Award.

## **Director of Customer Success (Employee #1)** | JabaTalks, LLC | July 2016 - July 2017

- Built the Customer Success function from scratch as Employee #1, overseeing onboarding, implementation, product delivery, and support while growing to 15 customers and \$100K+ ARR.
- Converted unpaid pilots with Washington D.C. Public Schools and Georgetown University into \$20K ARR in paid, referenceable customers through executive engagement and onsite relationship management.

## **Customer Success Manager** | Kit Check, Inc. | August 2014 - July 2016

- Led implementations for 70+ enterprise hospital systems representing \$3M+ ARR, managing onboarding, training, and adoption from sales handoff through go-live for organizations including Ascension, HCA Healthcare, and Advocate.
- Reduced implementation time 25% by building a scalable enablement program using Articulate, training and certifying 5,000+ system users.

## **Service Delivery Analyst** | The Northridge Group, Inc. | June 2013 - August 2014

- Led \$4M in executive engagements as the lead analyst across 5 Principals with a focus on customer experience and technology for Fortune 100 clients such as BCBS, United Healthcare, and CompTIA.
- Increased customer satisfaction ~3% for a go-to-market pilot strategy for healthcare exchanges, following strategic recommendation to monitor Voice-of-the-Customer channels for earlier interventions.

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## **EDUCATION & CERTIFICATIONS**

### **Georgetown University**, Washington, DC

Master of Professional Studies, Technology Management - May 2021 | 4.0 GPA

### **University of Michigan**, Ann Arbor, MI

Bachelor of Arts, School of Literature, Sciences, & Arts - May 2013 | 3.6 GPA | University Honors

Value Selling Certification | ValueSelling Associates | 2024

Mastership in Customer Success | Winning by Design | 2021

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**Technical Proficiencies:** Gainsight, Salesforce, Tableau, BitQuery, Google Workspace, Smartsheet, [Monday.com](#), Airtable, JIRA, Slack, Microsoft Office Suite, Claude Code, OpenCode, Gemini, ChatGPT, Gong, DocuSign, Notion, Loom, Articulate, Zendesk