

# James Hayward-Zhu

Co-founder, Pivotal Path · Customer Success Operations Manager, Verint

[JamesH@pivotalpath.co.uk](mailto:JamesH@pivotalpath.co.uk) · [linkedin.com/in/jayhayzhu](https://linkedin.com/in/jayhayzhu) · [pivotalpath.co.uk](https://pivotalpath.co.uk)

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## SUMMARY

Customer Success Operations Manager with sixteen years revitalising customer relationships through data and AI-driven strategy. Recently built a multi-agent AI ecosystem that cut Success Plan creation from 3 hours to 10–15 minutes (a 90% gain), and unified disjointed data after a \$3B acquisition using Microsoft Fabric and Power BI. A strategic operator who bridges data silos to inform executive decisions.

## EXPERIENCE

### Verint Systems

Sept 2022 – Present

#### Customer Success Operations Manager

Built a multi-agent Success Plan AI agent that cut creation time from 3 hours to 10–15 minutes (90% gain), and integrated Claude LLM for market-news “elevator pitch” summaries piped straight into Totango. Led the CSP V2 rollout, unifying disjointed legacy data via Microsoft Fabric and Power BI into a single source of truth after Verint’s \$3B Thoma Bravo acquisition.

### Conversocial (acquired by Verint)

2021 – 2022

#### Customer Success Manager

Designed the tech-touch model for sub-£100k ACV accounts, then drove the retention targets the Verint acquisition depended on through the transition.

### Orlo / SocialSignIn

2016 – 2021

#### CS & Account Management Director → Senior CSM (shareholder)

Joined the board and took over a struggling customer-success team, building the systems and training that lifted renewals from 70% to 85%+ — peaking over 120% with CS-qualified leads — while holding a 99% satisfaction rating. Ran a £1.2M mid-market book of 42 complex accounts across charity, housing and finance, and supported 200+ client organisations and 5,000+ users.

- Migrated the Salesforce CRM single-handed.
- Delivered training for Virgin Trains, National Express and Sussex Police.

### HandsHQ

2014 – 2016

#### Account Manager & Business Development

Became the personal point of contact for a SaaS risk-assessment platform’s customers and delivered hundreds of live demos. Oversaw the move to Salesforce, building the email and scheduling integrations and custom functions around it.

### Streaming Tank

2014

#### Account Management & Marketing

Ran gaming-sector accounts and won new business through creative pitching — including a Sony PlayStation relationship I established from scratch and supported at their GamesCom keynote, plus campaign pitches to Paddy Power, Metal Hammer and Rimmel London.

## Time Etc

2010 – 2014

### Account Manager

Managed 70% of the team's clients and call-handling for 300+ firms. Diagnosed why targets kept slipping, restructured training and account allocation to hit them for the first time in the company's history, and redesigned the entry-level price plan to win new clients at no extra operating cost.

### SKILLS & TOOLS

#### AI & automation

Multi-agent AI systems, LLM integration (Claude), copilot & utility bots, workflow automation, MCP

#### Data & analytics

Microsoft Fabric, Power BI, Power Query / Data Flows, SQL, Pendo

#### Customer Success & CRM

Totango (CSP), Salesforce (admin & migration), tech-touch models, retention & onboarding

#### Build & ship

Python, TypeScript, React, Node, Electron

### EDUCATION

**Certificate in Negotiation Mastery** · Harvard Business School Online · 2020

**BA, Social Policy** · University of Birmingham · 2010

### VOLUNTEERING

Special Effect — adapting game controllers for children with disabilities, and representing the charity at conferences.

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References available on request.