



# CRYSTAL LONGMAN

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## PROFESSIONAL SUMMARY

Customer Success and Account Management professional with 5+ years' experience driving retention, adoption, and expansion across SaaS, B2B, and healthcare technology portfolios. Skilled at building executive relationships, leading cross-functional teams, and delivering measurable ROI. Adept at guiding customers through onboarding, compliance, and lifecycle management while enabling revenue growth and operational efficiency. Recognized for translating customer insights into business impact and aligning solutions with client goals.

## CORE COMPETENCIES

Account Management  
Renewals & Expansions  
Net Revenue Retention  
Customer Adoption  
Territory Planning  
Executive Stakeholder Engagement  
Salesforce CRM  
Forecast Accuracy  
QBR Facilitation  
Data-Driven Insights  
SaaS Lifecycle Management  
Negotiation  
Value Realization  
Sales Methodologies

## EDUCATION & CERTIFICATIONS

Liberal Arts Course Studies —  
University of Colorado Denver

A.S. Radiologic Technology —  
Community College of Denver

Certified Customer Success  
Manager — SuccessCOACHING

## EXPERIENCE

### **Hybrid & 4B Marketing - Lead Enterprise Account Management** *Denver, CO • 01/2023 - 06/2025*

- Managed and grew regulated spaces and tech accounts through relationship building, strategy, and proactive communication.
- Oversaw multi-state operations for MSOs, coordinating compliance and aligning internal teams to client goals.
- Partnered with project managers and cross-functional stakeholders to design and execute client success plans tied to KPIs and outcomes.
- Streamlined onboarding and support processes, improving client experience and time-to-value.
- Maintained accurate CRM records, communicated data-driven results via QBRs, and identified risks and expansion opportunities.

### **TaskRay (Salesforce AppExchange Partner) - Mid-Market Customer Success / Account Manager** *Remote / Hybrid • 09/2021 - 01/2023*

- Owned a portfolio of 50+ mid-market SaaS accounts, consistently achieving renewals and driving account growth while reducing churn.
- Led strategic business reviews for C-suite executives, demonstrating ROI and adoption milestones.
- Identified and executed expansion opportunities, strengthening customer partnerships and contributing to portfolio growth.
- Partnered cross-functionally with Sales, Marketing, and Product to drive platform adoption and customer satisfaction.
- Maintained accurate forecasting and account health reporting, ensuring proactive risk management and renewal planning.
- Supported onboarding, product training, and technical issue resolution to increase adoption.
- Acted as the voice of the customer, shaping product roadmap priorities and driving long-term success outcomes.