

# LYNELL J. WAGENMAN

*Building scalable customer success organizations that create operational clarity, retention predictability, & long-term growth.*

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## OVERVIEW

Customer success & customer operations leader specializing in building scalable post-sale organizations during periods of rapid growth, operational transformation, & acquisition-stage change. Over the past decade, I've helped SaaS organizations move from reactive customer management toward structured, data-driven operating models — designing lifecycle frameworks, onboarding systems, forecasting infrastructure, customer health programs, and scalable engagement strategies that improve retention, visibility, and customer value realization.

## SELECTED IMPACT

### 110%+ NRR

Sustained 110%+ NRR & 92% retention across 200+ healthcare orgs through lifecycle segmentation, health scoring, onboarding redesign, & proactive engagement.

### Forecast variance 20% → 5%

Built forecasting infrastructure, KPI dashboards, CRM workflows, & customer health systems that improved renewal visibility and operational predictability.

### 5× company growth

Helped scale customer operations during BoardVitals' growth from \$5M → \$25M ARR alongside operational maturity & acquisition integration.

### +35% product adoption

Designed milestone-based onboarding workflows & playbooks that improved time-to-value by ~30% and created scalable customer activation experiences.

### \$1M expansion pipeline

Partnered with Sales leadership to operationalize customer health, expansion planning, & renewal strategy — contributing \$1M pipeline and \$800K closed expansion revenue.

## HOW I OPERATE

I'm at my best in fast-moving environments where customer operations need to evolve quickly alongside company growth. Across Medality, BoardVitals, & Handy, I joined organizations during hypergrowth, operational ambiguity, acquisition transition, and organizational scale — and focused on building clarity: clear lifecycle stages, scalable onboarding, measurable health frameworks, operational reporting, forecasting discipline, and stronger alignment across CS, Sales, Product, and leadership.

Great customer success organizations are not built on heroic effort or reactive escalation management. They are built through scalable systems, operational discipline, & a deep understanding of how customers realize value over time.

## FEATURED CASE STUDIES

## **Medality — Scaling CS after Series A**

*Head of Customer Success & Operations · Feb 2022 – Jul 2025 (Acquired by TrueLearn)*

Architected Medality's first scalable CS operating model: lifecycle segmentation, health scoring, onboarding playbooks, milestone-based workflows, KPI dashboards, forecasting systems, executive QBR structure, CRM automation, Custify implementation, and proactive retention frameworks. Partnered with Sales, Product, and executive teams on renewal planning, expansion visibility, and customer feedback loops.

- Sustained 110%+ NRR & 92% retention
- Increased product adoption by 35%, reduced TTFV by ~30%
- Improved forecast variance from ~20% → ~5%
- Supported 200+ healthcare orgs including Johns Hopkins & Kaiser Permanente
- Contributed \$1M expansion pipeline / \$800K closed expansion

## **BoardVitals — Operational scale through acquisition**

*Head of Customer Operations · Jul 2016 – Feb 2022 (Acquired by Ascend Learning)*

Built lifecycle frameworks, onboarding programs, customer education systems, KPI dashboards, feedback loops, operational workflows, and escalation processes. Created BoardVitals Bootcamp — a cohort-based onboarding & enablement program standardizing engagement across CS, support, and operations teams.

- Supported 5x ARR growth (\$5M → \$25M)
- Increased NRR by 4 points; CSAT by 5+ points
- Reduced employee ramp time by 25%+
- Strengthened operational maturity during acquisition integration

## **ACCME Accreditation Initiative**

*Cross-functional compliance build at BoardVitals*

Led the company-wide initiative to achieve ACCME accreditation internally — coordinating cross-functional requirements, building compliance infrastructure, and establishing sustainable operational workflows for accredited healthcare education programs.

- Achieved ACCME accreditation
- Transitioned compliance ops from outsourced to internal
- Improved operational scalability
- Strengthened market position in accredited education

# **PROFESSIONAL EXPERIENCE**

## **Medality (Acquired by TrueLearn) — Head of Customer Success & Operations**

*Feb 2022 – Jul 2025*

Built & scaled customer success operations during rapid growth & acquisition transition. Architected Medality's first scalable CS operating model — lifecycle segmentation, health scoring, onboarding, forecasting, CRM automation, and operational reporting infrastructure that sustained 110%+ NRR and 92% retention across 200+ healthcare organizations.

## **BoardVitals (Acquired by Ascend Learning) — Head of Customer Operations**

*Jul 2016 – Feb 2022 · Promoted from Customer Operations Manager*

Helped scale customer operations through rapid organizational growth & acquisition integration. Built onboarding programs, lifecycle engagement systems, KPI reporting, customer education, escalation workflows, and operational frameworks during 5x ARR growth.

## **Handy (Acquired by Angi) — Customer Experience & Account Management**

*Aug 2014 – Dec 2015*

Supported customer operations during Handy's Series B & C growth stages — improving operational workflows, escalation management, and logistics visibility within a high-volume marketplace environment.

### **LEADERSHIP PHILOSOPHY**

The strongest customer organizations create clarity — around customer value, operational priorities, risk, and growth opportunities. As companies scale, customer success becomes operational infrastructure that influences retention, forecasting, product feedback, customer experience, & long-term growth. I most enjoy helping organizations evolve from reactive customer management toward scalable, proactive systems.

### **AREAS OF EXPERTISE**

Customer success leadership · Customer operations · Lifecycle strategy · Forecasting & revenue planning · Customer health scoring · Retention & expansion · Portfolio segmentation · Operational scalability · Onboarding & activation · Cross-functional leadership · Strategic account management · Customer feedback systems · CRM & CS platforms · Process optimization · AI workflow experimentation & automation