TAYLOR LOREI

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CUSTOMER SUCCESS & OPERATIONS LEADER

CAREER OVERVIEW

Customer Success and Operations leader with experience guiding teams, implementing complex SaaS solutions, and building scalable systems. Combines hands-on product expertise with people leadership and operational rigor to translate business needs into effective workflows, training, and measurable outcomes. Experienced in enablement, onboarding and adoption, executive escalations, performance analytics, and process improvement.

Core Skills

People Leadership & Enablement | SaaS Implementation & Onboarding | Requirements Discovery | Workflow Configuration & Troubleshooting | Customer Success Operations | Process Improvement | SOP & Knowledge Management | Forecasting & Performance Analytics | CRM Optimization | Executive & Cross-Functional Leadership

PROFESSIONAL EXPERIENCE

Lead Forensics – Hybrid – Phoenix, AZ April 2024 – Present

Customer Success and Operations leader responsible for team performance, customer outcomes, implementation support, and scalable processes for a 7-person team supporting 450+ B2B SaaS customers and $2.3M+ in ARR.

Manager, Customer Success July 2025 – Present

- Lead a team of 7 Customer Success Managers supporting 450+ B2B SaaS customers and $2.3M+ ARR, overseeing performance, customer outcomes, workload priorities, and day-to-day operational execution.
- Onboarded and coached 15+ CSMs, coordinating training, systems education, workflows, and ongoing development while successfully managing up to four concurrent new-hire ramps.
- Remain hands-on with complex customer engagements, guiding requirements discovery, integration discussions, workflow configuration, technical troubleshooting, and complex implementations.
- Serve as a primary escalation point for complex customer challenges and executive stakeholder discussions, coordinating across teams to clarify needs, align expectations, and drive issues toward resolution.
- Partner cross-functionally with Product, Operations, and Sales to improve customer workflows, support product and process changes, and translate frontline customer and team feedback into operational improvements.
- Build and refine SOPs, workflows, onboarding programs, training resources, and tracking systems that standardize best practices, accelerate ramp time, and improve consistency across the team.
- Developed performance and forecasting systems adopted by three managers and the VP of Customer Success, improving visibility into key metrics, customer risk, business trends, and forecasted outcomes.

Senior Customer Success Manager February 2025 – June 2025

- Managed a strategic portfolio of B2B SaaS customers across implementation, onboarding, adoption, retention, and long-term value, serving as a trusted advisor to key stakeholders.
- Translated customer goals and operational challenges into platform configuration, tailored workflows, training, and enablement that supported successful implementation and adoption.
- Led workflow and process improvements while mentoring new CSMs through onboarding, complex product knowledge, customer strategy, and challenging account scenarios.

Customer Success Manager April 2024 – January 2025

- Owned the post-sale customer journey for a portfolio of B2B SaaS accounts, from implementation and onboarding through adoption, ongoing success, retention, and renewal.
- Conducted discovery, developed deep product expertise, and translated customer needs into tailored workflows, user training, technical troubleshooting, and practical adoption strategies.

The Knot Worldwide – Remote May 2023 – April 2024
Account Executive

- Managed a high-volume client portfolio and pipeline requiring strong organization, detailed tracking, prioritization, and consistent follow-through across competing responsibilities.
- Partnered cross-functionally with internal teams to coordinate stakeholder needs, operational requirements, and service delivery.
- Built trusted client relationships through responsive communication, expectation management, and a highly service-oriented approach.

HomeLight – Remote/Hybrid – Phoenix, AZ July 2020 – May 2023
Sr. Consumer Client Manager & Team Lead (June 2022-May 2023)
Consumer Client Manager (May 2021-June 2022)
Home Consultant (July 2020-May 2021)

- Joined an early-stage pilot for a new real estate product as one of its first team members, helping build the workflows, processes, and operating structure needed to turn the concept into a scalable business unit.
- Managed the end-to-end execution of 60+ complex, multi-month real estate transactions generating $2.85M+ in profit, owning customer communication, negotiations, documentation, timelines, and coordination across internal and external stakeholders.
- Helped scale the team from 2 to 10 people while continuing to manage an active portfolio of transactions and a $20M+ pipeline, balancing hands-on client ownership with the operational needs of a rapidly growing program.
- Built and refined SOPs, workflows, documentation, resource hubs, and team processes as the product evolved, creating structure where established processes or precedent did not yet exist.
- Progressed into a Team Lead role, onboarding and training new hires, providing ongoing coaching, supporting performance, and serving as an escalation point for complex client and operational issues.
- Partnered across teams to identify process gaps, troubleshoot emerging challenges, and adapt workflows as transaction volume, team size, and product requirements grew.
- Operated with significant autonomy in a fast-moving pilot environment, independently solving problems, making judgment calls, and taking ownership beyond the boundaries of a traditional client management role.

Alaska Airlines January 2017 – April 2020
Flight Attendant Los Angeles, California

- Delivered a high level of service in a fast-paced, highly regulated environment while creating a positive experience for passengers from diverse backgrounds.
- Exercised discretion and sound judgment when resolving sensitive customer situations, disputes, safety concerns, and unexpected operational challenges.
- Collaborated closely with flight crews, gate agents, scheduling teams, and other departments to support smooth day-to-day operations.
- Maintained strict compliance with FAA regulations, company policies, safety procedures, documentation requirements, and professional standards.
- Routinely inspected emergency equipment and operational environments for compliance with established safety requirements.