

# **Mary Elizabeth T. Gatchalian**

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## **Professional Summary:**

I have been an experienced Client Success Manager/ Project Manager for 18 months, As a Client Success Manager I am responsible for planning, executing, and closing projects effectively and efficiently. My role is crucial in ensuring that projects are completed on time, within scope, and within budget. I ensure customers get fast time-to-value. I handle escalations from clients and minimize churn.

## **Skills:**

- Project Initiation
- Project Planning
- Execution and Monitoring
- Risk Management
- Client Relations
- Team Handling
- Customer service Phone/ email
- LinkedIn Lead Generation
- CRM Maintenance, Asana, Click Up, Close, Pipedrive, Monday.com
- Calendar Management
- Conflict Resolution
- Light Bookkeeping using Quickbooks
- Invoicing
- Creating SOP
- Email Management
- Gsuite

## **Soft Skills:**

- Exceptional communication skills
- MS Windows proficient
- Quick learner
- Strong client relations
- Multi-line phone talent
- Keen Attention to details

- Results Oriented
- Adaptability to change

## **Work History:**

### **Client Success and Lead Generator | DM Digital | November 2023- Present**

#### Research and Target Audience Identification:

- Conduct market research to understand your target audience's demographics, preferences, and pain points.
- Use tools like Google Analytics, social media insights, and customer relationship management (CRM) software to gather data.

#### Developing Lead Generation Strategies:

- Create effective lead generation strategies tailored to your target audience.
- Utilize various channels such as email marketing, social media, content marketing, SEO, PPC advertising, and networking events to reach potential leads.
- Collaborate with marketing and sales teams to align lead generation efforts with overall business goals.

#### Content Creation and Optimization:

- Produce high-quality content (blogs, articles, whitepapers, case studies, videos, etc.) that resonates with your target audience and addresses their pain points.
- Optimize content for search engines to increase visibility and attract organic traffic.
- Implement lead magnets such as ebooks, webinars, or free trials to capture leads' contact information.

#### Lead Capture and Nurturing:

- Set up lead capture forms on your website and landing pages to collect contact information from potential leads.
- Develop lead nurturing workflows using email marketing automation tools to engage and educate leads over time.
- Personalize communications based on leads' interests and behaviors to build trust and relationships.

#### Analyzing and Reporting:

- Track and analyze key metrics such as website traffic, conversion rates, email open rates, and lead quality.

- Use data insights to optimize lead generation campaigns and improve performance over time.
- Prepare regular reports for stakeholders to demonstrate the effectiveness of lead generation efforts and ROI.

#### Continuous Learning and Improvement:

- Stay updated on industry trends, best practices, and emerging technologies related to lead generation.
- Experiment with new strategies, tools, and tactics to stay ahead of the competition and drive better results.
- Seek feedback from sales teams and leads to identify areas for improvement and refine lead generation processes.

## **Client Success and Project Manager | ConvrtX | March 2022- November 2023**

### **Project Initiation:**

- Define the project's goals, scope, and objectives.
- Identify stakeholders and establish communication channels.
- Create a project charter outlining project details and high-level requirements.

### **Project Planning:**

- Develop a detailed project plan, including tasks, timelines, and resources.
- Define project milestones and deliverables.
- Estimate costs and create a budget.
- Identify potential risks and develop a risk management plan.
- Allocate resources and assign responsibilities to team members.

### **Execution and Monitoring:**

- Coordinate and manage the project team's activities.
- Monitor project progress against the plan and track milestones.
- Manage scope changes and ensure they are properly documented and approved.
- Address issues and risks as they arise, making necessary adjustments to keep the project on track.
- Communicate with stakeholders about project status and updates.

### **Risk Management:**

- Identify potential risks to the project's success.
- Develop strategies to mitigate and manage risks.

- Monitor and assess risks throughout the project lifecycle.
- Implement contingency plans if risks materialize.

#### **Quality Management:**

- Define quality standards and ensure project deliverables meet those standards.
- Perform regular quality checks and tests.
- Implement processes for quality assurance and quality control.

#### **Communication:**

- Maintain open and effective communication with team members, stakeholders, and clients.
- Share project updates, progress reports, and important information.
- Handle conflicts and address concerns promptly.

#### **Resource Management:**

- Allocate and manage resources, including personnel, equipment, and materials.
- Ensure team members have the necessary tools and support to complete their tasks.

#### **Change Management:**

- Manage changes to project scope, schedule, or objectives.
- Evaluate change requests and determine their impact on the project.
- Obtain necessary approvals for changes from stakeholders.

#### **Closure:**

- Ensure all project deliverables are completed and meet quality standards.
- Obtain formal acceptance of the project from stakeholders.
- Conduct a project review to identify lessons learned and areas for improvement.
- Close out project contracts, release resources, and finalize documentation.

#### **Documentation:**

- Maintain comprehensive project documentation, including plans, reports, and records.
- Document decisions, changes, and communication throughout the project.
- Keep a “high-level view” of the entire support process.

### **Operations Manager ( Virtual Staffing Solutions) Feb 2021- March 2022**

- Manage day to day sales performance of the account
- Oversee operations
- Manages Team Leeds
- Align KPI's and client's goals

- Connect with clients over account updates

**Project Operations Manager | Assistify | July 2020- Feb 2021**

- Supports Virtual Assistants in Delivering Task for designated clients
- Provides quality assurance for deliverance of task
- Hire the qualified Assistant for client's special needs
- Process Payroll for VA's
- Assisting in CEO in onboarding new clients
- Coaching VA's

**Team Manager | August 2017- February 2020, Intuit Quickbooks | Convergys Philippines Inc | 6<sup>th</sup> FL i1 Bldg., Asiatown IT Park, Cebu City 6000**

- Responsible for the day-to-day supervision of a group of call center associates including work and attendance monitoring in accordance with organization policy and applicable legal requirements
- Effectively coach direct reports on their performance on a regular basis to ensure performance metrics are achieved
- Identify performance related issues, develop an action plan for improvement, implement corrective action, up to and including termination of employment
- Ensure service delivered to our customers meets contractual Key Performance Indicator ('KPIs') and financial expectations
- Communicate expectations to employees and provide timely updates
- Provide subject matter expertise in handling escalated customer calls as needed
- Conduct Team Meetings to ensure expedient communication of relevant information and as an open forum for input. Schedule and organize team activities
- Stay current on internal work processes, policies and procedures. Attend required manager development training
- Promote the Convergys values through both behavior and attitude, including being an advocate for team members

**Customer Support Professional | September 2009- August 2012 | Intuit Quickbooks | Convergys Philippines Inc | 6<sup>th</sup> FL i1 Bldg., Asiatown IT Park, Cebu City 6000**

- Provides 100% customer satisfaction by resolving issues regarding their payroll account ie; charges, direct deposit and tax return.

**Customer Support | ePerformax Cebu | November 2007- August 2009**

- Provides 100% customer experience by answering all the inquiry of the client regarding their Checking and Savings Account with Washing Mutual.

## **Education Background:**

- *University of San Jose Recoletos | BS Business Administration- Major in Human Resource Management (2019)*

## **Accomplishments:**

1. *Q4 Team Manager Site Champion for 2016 by exceeding the client metrics and goals and Convergys values.*
2. *Certificate on Convergys Leaders as Coaches 1 and 2.*

## **Special Projects:**

***Account Specific Hiring Manager ( July 2015- November 2015 Intuit DIY | Convergys Philippines Inc| 6<sup>th</sup> FL i1 Bldg., Asiatown IT Park, Cebu City 6000***

- *Conduct interviews for aspiring applicant for the account.*
- *Reports directly to SOM and Hiring Team for the pass rate per da.*
- *Ensure overall quality of hires for the program for the upcoming ramp.*

***Compliance Manager | March 2016-June2016 Intuit DIY | Convergys Philippines Inc| 6<sup>th</sup> FL i1 Bldg., Asiatown IT Park, Cebu City 6000***

- *Create a linear process when it comes to documenting a call and when to close the case.*
- *Work with client to ensure the quality of the process all across organization*
- *Attend WBR with the clients to see trending performance on Document Compliance and Closed Case Rate*
- *Audit every case created and provide feedback to TL or SME of the agent.*
- *Provide real -time intervention for the agents/ TL/ SMEs*

***Core Engagement Team Lead | March 2017- Present Intuit DIY | Convergys Philippines Inc| 6<sup>th</sup> FL i1 Bldg., Asiatown IT Park, Cebu City 6000***

- *Plan and execute RNR for the whole program, agents to SMEs to TLs*

## **CHARACTER REFERENCES**

***Binky Magbutay***

*Team Lead – Intuit Account*

*Convergys, Inc*

*+63-9271276611*

***Junel Lloyd Calamohoy***

*Operations Manager- Intuit Account Convergys Inc.*

*+63-908-860-6920*

***Denmark Ubas***

*Team Lead – Intuit Account*

*Convergys, Inc*

*+639-984-616-478*