

Client Advisory

Delivering Compliance Outcomes: Customer Success Perspectives

September 24 | 2:00 – 2:30 p.m.



Kris McCabe

Director of Customer
Success

- **Leads the Customer Success organization**, driving proactive product adoption and long-term customer value.
- **Designs and implements scalable Customer Success strategies** to improve satisfaction, retention, and growth across the B2B SaaS portfolio, including dedicated Renewal and Account Operations functions.
- **Partners cross functionally** with Product, Sales, and Operations to strengthen the customer journey and drive roadmap adoption.
- **Builds and mentors a growing Customer Success team**, laying the foundation for future leadership and scale.

Humans Partnering with Human Resources



Kristen McCabe
Director, Customer Success



Ryan Stilwell
Sr. Account Director



Cassy Wille
Account Director



Carol Dulski
Manager, Customer Success



Deja Chattard
Implementation Manager



Emilia Zellmer
Sr. Customer Success Manager



Doris Rivas
Customer Success Manager,
Team Lead



Molly Murphy
Customer Success Manager



Andrea Decker
Customer Success Manager



Sarah Rolstad
Customer Success Manager



Kayla Kvale
Customer Success Manager



Tonya Koeneman
Customer Success Manager



Olivia Menke
Customer Success Manager



Belle Hauske
Account Operations Specialist



Kelsey Johnson
Customer Service Representative



Katie Wittstock
Customer Service Representative



Kelsey Roy
Renewal Specialist



Lexy Bradley
Renewal Specialist

Session Preview

We will cover the following topics:

- 1** A Team Built for Long-Term Partnership

- 2** How We Partner With You

- 3** Client Trust, Measured

- 4** Built to Keep Clients, Not Just Win Them

- 5** Open Discussion: What Else Can We Be Doing?

WHO WE ARE

A Team Built for Long-Term Partnership

We measure success in **relationships**, not just renewals:

- Dedicated points of contact who know your business and footprint
- Proactive compliance guidance, not reactive support tickets
- Continuity that carries year-round, not just at renewal
- A team invested in your success for the long haul

Familiar faces, fewer handoffs, deeper compliance knowledge of your business.

5.5

Average Tenure in Years

OUR APPROACH

How We Partner With You

Our partnership model is built around **three outcomes** for your organization:

- Risk reduction — proactive compliance guidance that keeps you ahead of exposure
- Consistency — reliable compliance execution across every location and team
- A partner who knows your business — advisors who anticipate your needs, not just respond to them

We succeed when your compliance program runs smoother because of us.

50

**Average Compliance Cases
per month**

CLIENT SATISFACTION

Client Trust, Measured

Our Net Promoter Score of **80** reflects strong client advocacy:

- Well above the SaaS industry benchmark
- Measures how likely clients are to recommend GovDocs
- Reflects consistency of service across our entire portfolio
- Validates our high-touch, relationship-first model

Clients don't just stay. They recommend us.

80

Net Promoter Score

CLIENT RETENTION

Built to Keep Clients, Not Just Win Them

GovDocs maintains a **98% client retention rate** year-to-date:

- Driven by proactive, relationship-first support model
- Supported by a stress-free, no-surprise renewal process
- Backed by dedicated Renewal Specialists on every account
- Reinforced by access to compliance expertise year-round

Retention isn't a metric here. It's the outcome of the relationship.

98%

Client Retention, YTD

YOUR TURN

Open Discussion

We exist for your success, so we want to hear it straight **from you**:

- What's working well in your day-to-day experience with GovDocs?
- Where are we falling short of what you need?
- What should we prioritize in the next year?

What else can we be doing to help you be successful?

