

Sonya Freeney

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EXPERIENCE

Customer Success Manager, Small / Mid-Market / Enterprise

InvoiceCloud | Boston, MA (Remote)

September 2022 - November 2025

- Managed a \$6MM ARR book of business spanning 45-80 accounts across the utilities and insurance paytech verticals, maintaining strong client retention and health scores throughout tenure.
- Generated \$100K in annual expansion revenue by identifying upsell opportunities, developing client-specific business cases, and tracking pipeline in Salesforce across SMB to enterprise accounts.
- Delivered Executive Business Reviews to C-suite and VP-level stakeholders, leveraging Salesforce and Tableau to surface actionable insights that influenced renewal and expansion decisions.
- Developed individualized success plans aligned to each client's business objectives, driving long-term product adoption, account growth, and proactive risk mitigation.
- Led cross-functional collaboration with product, support, and implementation teams to resolve escalations, accelerate onboarding, and improve overall time-to-value.
- Facilitated tailored product training and enablement sessions to increase platform utilization rates and improve customer satisfaction outcomes across the portfolio.

Account Manager / Customer Success Manager

onPhase (formerly DocuPhase Payment Solutions / Clearwater Payments) | Dallas, TX | June 2017 - September 2022

- Served as the sole CSM for approximately 25 utility and insurance clients, owning the full client lifecycle from contract execution through implementation, go-live, and ongoing relationship management.
- Built the Customer Care function from the ground up, including team hiring, process design, tooling selection, and workflow documentation for online payment processing and client inquiry management.
- Conducted KYC (Know Your Customer) due diligence reviews as part of client onboarding, ensuring compliance with regulatory requirements in a fintech environment.
- Delivered Executive Business Reviews to client stakeholders, communicating platform performance, adoption metrics, and growth opportunities to support renewal and expansion.
- Collaborated cross-functionally with IT and operations teams using CRM and project management tools to drive resolution of client requests and ongoing initiatives.
- Monitored platform release performance and documented outcomes to assess change impact and inform continuous process improvements across the client base.

Accounting Specialist, Payment Processing

Entergy Corporation | Hammond, LA

June 2004 - June 2017

- Processed and reconciled customer payments using integrated accounting software and secure transaction platforms, ensuring accurate and timely account updates across utility services.
- Participated in Sarbanes-Oxley (SOX) compliance testing, supporting internal audit processes and financial controls in a regulated utility environment.
- Resolved payment discrepancies through comprehensive ERP system analysis and transaction-level data reviews, identifying and correcting outstanding issues.
- Developed and led the rollout of training content for internal call center agents, aligning materials with evolving payment processing protocols and regulatory requirements.

EDUCATION

Product Management Certification | University of Texas

2025

Bachelor of Science, Business Administration | Northwestern State University

2017

CAPM Certification | In Progress

SKILLS & TOOLS

Customer Success Platforms: Salesforce, Gong, ProductBoard, Seismic, Tableau

Project & Collaboration Tools: JIRA, Confluence, Microsoft Suite

Core Competencies: Portfolio Management, ARR Growth, Expansion Revenue, Client Retention, Executive Business Reviews, Onboarding, Product Adoption, Cross-Functional Collaboration, Stakeholder Management, Process Design, KYC Compliance, SOX Testing

Industries: SaaS, Fintech, Payments, Utilities, Insurance