Amber McClure

Customer Success and Client Operations

Belton, Texas | Open to Remote U.S. Opportunities
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Customer Success and Client Operations leader who turns complex customer needs into clear strategies and practical plans aligned with their mission and goals. Brings more than a decade across client relationships, account management, and business operations, including hands-on SaaS onboarding and leadership of a remote team of up to 35.

CORE EXPERTISE

Client relationship and account management • Customer discovery and needs assessment
Client onboarding and team handoffs • Strategic planning and goal alignment
CRM and workflow design • Process documentation and improvement
Remote team leadership • Client communication and ongoing support

PROFESSIONAL EXPERIENCE

Founder and Client Operations Director

Live Free Virtual Services | Remote | May 2020 - December 2025

- Built and led a remote service business with a team of up to 35, owning client relationships from discovery and scoping through onboarding, service delivery, account reviews, and renewals.
- Translated client priorities into practical working plans: organized daily, weekly, and monthly tasks, clarified responsibilities and approvals, and identified tools and training needs.
- Designed a process connecting client discovery to onboarding and team handoffs. Guided the team in using client information, defined responsibilities, and follow-up steps as a shared plan.
- Configured Zoho CRM and Zoho Recruit workflows to track client needs, candidate pipelines, and ongoing work. Built and tested lifecycle email sequences and coordinated technical support.
- Led recruiting, onboarding, training, and workload coordination. Used client and team check-ins, CRM activity, and Hubstaff reporting to address delivery gaps, capacity constraints, and escalations.

Customer Success Operations Consultant

Elavix Inc. | Remote contract | August 2024 - September 2025

- Designed and documented SaaS onboarding from discovery and guided account-hub setup through customer education, follow-up, and ongoing support.
- Configured and tested Zoho CRM and Mautic lifecycle workflows, refining triggers, segmentation, and timing across trial, onboarding, and retention communications.
- Identified a timing issue that could delay trial guidance. Proposed running trial education alongside onboarding reminders, stopping the reminders when setup was complete; the team adopted the approach.
- Partnered with Customer Success, Sales, Marketing, and platform stakeholders to troubleshoot workflows. Trained a teammate and organized reusable templates to support handoffs.

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ADDITIONAL CLIENT OPERATIONS EXPERIENCE

Founder

Live Free Insurance | Austin, Texas | January 2019 - May 2020

- Built client workflows from consultation and policy selection through onboarding, servicing, and renewals. Coordinated customer needs, carrier requirements, documentation, and deadlines.
- Managed account relationships and renewal follow-up, helping clients understand coverage choices and next steps.

Insurance Agent

Liberty Mutual Insurance | Austin, Texas | April 2018 - January 2019

- Guided customers through policy onboarding, coverage education, account changes, and issue resolution while maintaining accurate documentation in a regulated environment.

Client Account Manager

Greg Meyer State Farm Agency | Round Rock, Texas | August 2017 - April 2018

- Managed customer requests, policy changes, renewals, billing questions, and account documentation, with regular follow-up to support client relationships.

Senior Client Account Manager

Kelli Davis State Farm Agency | Bakersfield, California | May 2014 - July 2017

- Managed long-term insurance relationships through onboarding, account reviews, renewals, and issue resolution. Supported auto-loan customers with education and ongoing account service.

Branch Account Executive II

OneMain Financial | Bakersfield, California | July 2013 - April 2014

- Supported personal and auto lending through needs assessment, onboarding, servicing, documentation, customer communication, and compliance-driven follow-up.

Senior Account Executive

HSBC Beneficial | Tulare, California | July 2004 - September 2008

- Supported mortgage, personal, and auto lending customers through consultation, account setup, documentation, servicing, and issue resolution.

TECHNOLOGY

Zoho CRM • Zoho Recruit • Mautic • Hubstaff • Asana • Notion • Trello • Slack • Zoom • Microsoft 365 and Excel • Google Workspace and Sheets • DocuSign

Implementation coordination, CRM configuration and testing, lifecycle email automation, SOPs, onboarding playbooks, and handoff documentation.

EDUCATION

Associate of Science in Business Administration

San Joaquin Valley College | Visalia, California