

URVASHI SHARMA

Customer Success | Operations | Client Success | Onboarding Leader

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Professional Summary

Customer Success and Operations professional with 11 years of experience across SaaS, HRTech, Banking and Financial Services. Experienced in customer lifecycle management, onboarding, implementation, stakeholder management, operational excellence, customer retention, process improvement and cross-functional leadership. Proven success managing large customer portfolios, improving adoption, reducing churn, building governance frameworks and leading customer-centric transformation initiatives.

Core Competencies

Customer Success • Customer Lifecycle • Onboarding • Implementation • Customer Retention • Customer Adoption • Customer Health • NPS • CSAT • QBR/MBR • Stakeholder Management • Program Management • Portfolio Management • Process Excellence • KPI Governance • Executive Reporting • Business Transformation • CRM • Salesforce • Zendesk • Freshdesk • Custify • Jira

Professional Experience

Greytip Software | Manager – Customer Success (Dec 2022–Present)

- Lead Customer Success across India & GCC supporting 3,000+ SMB customers, 1,500+ Mid-Market customers and 250+ partner accounts.
- Owned end-to-end customer lifecycle covering onboarding, implementation, adoption, renewals, expansion and advocacy.
- Built governance frameworks, SOPs, KPIs, dashboards and performance reviews.
- Established customer health models using NPS, CSAT, usage analytics and risk indicators.
- Reduced churn through proactive intervention and executive stakeholder management.
- Led MBRs/QBRs, executive escalations, workflow automation, Jira enhancement requests and cross-functional initiatives.
- Managed ₹2 Cr+ ARR portfolio, payment collections, recruitment, coaching and customer advocacy programs.

ClearTax | Senior Customer Success Manager (Oct 2020–Nov 2022)

- Led onboarding and implementation teams handling 200+ customer accounts.
- Improved adoption, reduced churn and standardized customer success processes.
- Partnered with Sales, Product and Support to resolve escalations and improve customer outcomes.
- Led B2B sales initiatives, GST software adoption, MIS reporting and target achievement.

ICICI Bank | Assistant Manager – CSM (Jul 2016–Jan 2020)

- Managed banking operations, portfolio relationships, customer acquisition, compliance, cross-selling, lending support, service quality and fraud verification while consistently achieving business targets.

Kotak Mahindra Bank | Assistant Manager (Jun 2015–Jul 2016)

- Managed credit card sales, retention, balance transfers, EMI conversions, referrals, MIS reporting and monthly sales targets.

HDB Financial Services | Senior Officer (Dec 2013–May 2015)

- Managed credit card collections and recovery operations across multiple regions while consistently exceeding collection targets.

Key Achievements

- Best Manager Award – Greytip
- Promotion within 3 months – ClearTax
- M52 Super Hero Award – ICICI Bank
- Best Fresher Award – Kotak
- Multiple Performer of the Month Awards & PAN India Achiever – HDB

Education & Certifications

- B.Com – Mumbai University
- HSC & SSC – Maharashtra State Board
- IRDA Certified | AML, KYC & Compliance | Pursuing PMP