Kevin Ortega

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PROFESSIONAL SUMMARY

Meticulous, results-driven Account Management professional with strong expertise in managing client portfolios, delivering seamless onboarding, and driving customer success in fast-paced, technology-driven environments. Experienced in resolving complex client challenges, optimizing technical integrations, and strengthening stakeholder engagement to maximize long-term value. Proficient in CRM platforms, KPI tracking, and data-driven insights to enhance performance, with additional technical expertise in workflow automation, API integrations, and data visualization. Recognized for building trusted client relationships, aligning solutions with business objectives, and ensuring measurable outcomes across SaaS, cybersecurity, and enterprise solutions.

CORE COMPETENCIES

- ❖ **Client Relationship Management:** Proficient in building and maintaining long-term client partnerships to drive satisfaction and loyalty.
- ❖ **Account Growth & Retention:** Skilled in identifying expansion opportunities while ensuring consistent client retention.
- ❖ **Strategic Planning & Execution:** Experienced in developing and implementing tailored account strategies aligned with business goals.
- ❖ **Sales & Revenue Optimization:** Expert in maximizing revenue through upselling, cross-selling, and value-driven solutions.
- ❖ **Communication & Negotiation:** Strong in delivering persuasive presentations and negotiating favorable agreements with clients.

HARD SKILLS

Salesforce CRM Analytics | CRM Tools (Salesforce, HelpScout, TalkDesk) | Data Analysis & Reporting | MS Office Suite (Excel, PowerPoint, Word, Outlook) | SLA Reporting | Strategic Support Planning | Automated Workflow Solutions & Process Optimization |API & SSO Integrations (RESTful APIs, OAuth, SAML) | SQL & Python (for reporting/automation support) | Tableau (Data Visualization & BI) | Web Platforms: Webflow, WordPress | Automation Tools: Zapier

SOFT SKILLS

Account Management | Customer Relationship Management (CRM) |Customer Onboarding | Success Management | Stakeholder Management & Engagement | Strategic Negotiations & Conflict Resolution | KPI Tracking & Account Strategy | Customer Service Excellence | Excellent Communication |Interpersonal Skills | Problem-Solving | Critical Thinking | Time Management | Organizational Skills | Adaptability & Cross-Functional Collaboration

PROFESSIONAL EXPERIENCE

Account Manager   **07/2025 – Present**
Cybervadis | Remote

- ❖ **Vendor & Client Portfolio Management:** Manage a diverse portfolio of vendors and clients, ensuring timely completion of CyberVadis security assessments.
- ❖ **Client Relationship Management:** Serve as the primary point of escalation, coordinating with internal teams to resolve complex client issues and enhance satisfaction.
- ❖ **Cross-Functional Synergy:** Engage with key internal teams to troubleshoot systemic issues, championing enhancements that benefit the client and vendor journeys alike.
- ❖ **Performance Surveillance:** Continuously monitor and interpret KPIs, uplift vendor involvement through meticulously planned outreach and engagement campaigns.

Senior Onboarding Executive   08/2024 – 07/2025

Cybervadis | Remote

❖ **Client Onboarding & Support:** Served as primary point of contact during onboarding, delivering premium support to ensure seamless integration and maximize platform value.

❖ **Unified Team Approach:** Collaborated with Customer Success, Finance, and Legal units to dissect and address technical and operational queries, consistently aligning resolution processes with client commitments.

❖ **CRM-Driven Relationship Stewardship:** Utilized CRM tools to catalogue touchpoints, monitor milestone achievement, and catalyze forward momentum towards planned business objectives.

❖ **Proactive Feature Navigation & Instruction:** Led customers through platform capabilities using data-driven best practices, delivering strategic counsel that amplifies the density of their cybersecurity risk exercises.

❖ **Decision-First Stakeholder Maintenance:** Cultivated productive ties with senior stakeholders and implementation personnel to secure continuous platform engagement and effective ongoing adoption momentum.

WORK EXPERIENCE CONTINUES

Samsung Customer and Technical Support Specialist   07/2021 – 04/2024

iAdvize Inc | Remote

Passenger Service Agent   10/2020 – 07/2021

Delta Airlines | San Salvador, El Salvador (Onsite)

VOLUNTEER EXPERIENCE

❖ Peer Mentorship **| Fanshawe College, Ontario | 2023 - 2024**
❖ Youth Committee **| El Salvador | 2016 – 2020**

EDUCATIONS

❖ **Fanshawe College | 09/2022 - 04/2024**
   Diploma in Web Development and Internet Applications
❖ **University of El Salvador | 02/2017 - 12/2022**
   Bachelor's Degree in Computer Science

CERTIFICATES

❖ Generative AI for Leaders **| Vanderbilt University (Coursera) | 08/2025**
❖ AWS Cloud Technical Essentials **| AWS (Coursera) | 08/2025**
❖ Successful Negotiation: Essential Strategies and Skills **| University of Michigan (Coursera) | 07/2025**
❖ Webflow Practitioner Certification **| Webflow | 01/2025**
❖ Google Project Management Specialization **| Google (Coursera) | 02/2025**
❖ Foundations of Digital Marketing and E-commerce **| Google (Coursera) | 09/2024**
❖ Problem Solving Using Computational Thinking **| University of Michigan (Coursera) | 09/2021**
❖ Strategic Management **| Copenhagen Business School (Coursera) | 06/2021**
❖ International Business I **| University of Nuevo Mexico (Coursera) | 04/2021**
❖ Leadership and Emotional Intelligence **| Indian School of Business (Coursera) | 04/2021**
❖ Excel Skills for Business: Essentials **| Macquarie University (Coursera) | 04/2020**
❖ Cloud Computing **| Google Activate | 03/2020**
❖ Technical Support Fundamentals **| Google (Coursera) | 01/2020**

LANGUAGES

English: Fluent | Spanish: Native | German: Basic