

JON MARC PATTON

Chief Customer Officer | Chief Operating Officer | GTM Leadership

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EXECUTIVE SUMMARY

Customer-focused executive with 25+ years scaling SaaS companies from \$4M to \$200M+ ARR through post-sales leadership, retention strategy, and customer-driven growth — including 2 successful exits. Proven in turnarounds, global team scaling, and PE-backed environments across public sector, healthcare, financial services, and enterprise. Career highlights include driving NDR from 70% to 100%, maintaining 110% NDR through rapid international expansion across 9 countries, and achieving Rule of 20 from a double-digit negative position in under two years. Also designed and built CARRavan, an AI-powered NDR/GDR diagnostic prototype, using Claude, Lovable, ChatGPT, and Gemini — demonstrating hands-on AI transformation capability in a CS context.

Core Value Drivers: Customer Success & Retention • NDR/GDR Optimization • Team Scaling & Leadership • AI-Driven CS Operations • Public Sector and Channel Partnerships

PROFESSIONAL EXPERIENCE

Cascade Strategy, INC. | Global Head of Sales

AI Strategy Execution Platform | New York City, NY | Sept 2025 – April 2026

Venture Capital backed (Telescope Partners, Carthona Capital, One Ventures, + others)

Joined as a bridge engagement to work again with a former CEO partner, taking on the global sales leadership function. The company is currently navigating a funding transition; engagement wound down amicably with CEO and Chairman as references.

- **Pipeline Growth:** Increased monthly pipeline 60% (\$1.8M to \$3.5M) through BDR/AE team building and tech stack optimization
- **Revenue Performance:** Grew Q1 2026 sales 112% YoY (\$354K to \$750K)
- **Outbound Function:** Built AI-powered outbound engine leveraging Clay, LinkedIn Sales Navigator AI and HubSpot for data enrichment and targeting, launching the first successful outbound motion after 4 prior failed attempts
- **Sales Process:** Reverse-engineered revenue targets into activity quotas, improving conversion rates and ACV

SHARPEN CX, INC. | Chief Customer Officer / Chief Operating Officer

AI CCaaS Platform (\$14M to \$25M) | Indianapolis, IN | July 2023 – August 2025

Private Equity backed (Teleo, Inc.)

Recruited to lead turnaround and position for exit following challenging merger integration.

- **Revenue Performance:** Drove NDR from 70% to 100% and GDR from 60% to 96% by deploying AI-powered workflows (ChatGPT, Claude) across a lean team of 4 CSMs to analyze customer health signals, product engagement, ticket trends, and market data at scale, enabling proactive intervention across 300+ accounts post-merger
- **Voice of Customer:** Built a formal VoC program spanning in-app NPS, persona-targeted surveys, and post-resolution support CSAT, with a closed-loop process for detractor and passive follow-up; fed this signal directly into automated customer health scoring used in leadership and board reporting
- **Customer Experience:** Sustained 99% post-resolution support CSAT through the turnaround, using VoC insight to prioritize proactive intervention across the account base
- **Profitability:** Achieved Rule of 20 in 2025, recovering from \$4M shortfall and 30% churn in 2023
- **Pricing Strategy:** Executed 5.2% rate increases across all renewals (target: 2%)
- **Go-to-Market:** Architected pricing framework and GTM strategy for post-merger expansion, including reseller program through BPO's and outbound demand generation
- **Sales Effectiveness:** Created results-oriented expansion sales process, emphasizing MEDDPIC elements and a consultative approach, as well as strong CRM data hygiene

TORII, INC. | Chief Customer Officer

SaaS Management Platform | New York, NY | May 2022 – July 2023

Venture Capital backed - Series B (Tiger Global Management, others)

Joined post-investment scaling initiative to build customer success and revenue expansion infrastructure.

- **Expansion Revenue:** Drove 25%+ monthly account expansion in first 6 months
- **Customer Intelligence:** Architected predictive revenue visibility systems improving forecast accuracy
- **Product Strategy:** Led pricing framework for platform modularization and cross-sell opportunities
- **Revenue Innovation:** Launched Contract Data Entry Services as new revenue stream

HYPERSCIENCE, INC. | Chief Customer Officer

AI Document Automation (\$8M to \$30M ARR) | New York, NY | January 2020 – February 2022

Venture Capital backed – Series B/C (Bessemer Venture Partners, others)

Built global customer success organization supporting rapid scaling and international expansion.

- **Team Scaling:** Built global organization from 6 to 70 members across 9 countries in 2 years, leading Directors and VPs across regions, growing customer base from 16 to 120
- **Revenue Growth:** Maintained 110% NDR throughout high-growth period
- **Operational Excellence:** Drove customer adoption of industry-leading AI/ML automation platform, accelerating time-to-value 50%, reducing churn, protecting \$30M ARR, and delivering measurable outcomes including 60% faster insurance claims processing for the Veterans Administration
- **Voice of Customer:** Built and personally facilitated the VoC program, using SurveyMonkey for email NPS integrated into Gainsight (which lacked native survey capability at the time) and Zendesk for support CSAT, with a closed-loop detractor/passive follow-up process feeding customer health scoring and board reporting
- **Customer Experience:** Drove NPS from the mid-30s to 67 and 64 over two years, and met support SLAs at 99% across the same period, exceeding response benchmarks

- **Technical Enablement:** Created marketecture diagrams and contributed to RFP responses articulating platform architecture, user experience, and business value to enterprise prospects and customers
- **Partner Enablement:** Launched Academy and Marketplace enabling ecosystem growth with IBM, Accenture, Deloitte, McKinsey and others

CIPHERHEALTH, INC. | Vice President, Professional Services

Healthcare IT SaaS | New York, NY | December 2018 – July 2019

Venture Capital backed (Atalaya Capital Management, others)

Recruited post-investment to establish Professional Services function supporting \$10M annual ARR growth; improved revenue recognition cycle time 25%, recovered \$300K+ in unrecognized revenue, and launched Solution Engineer team for pre-sales support.

JK GROUP → CYBERGRANTS LLC | Vice President, Professional Services

Corporate Philanthropy SaaS | Princeton, NJ | November 2012 – June 2018

Venture Capital backed (Waud Capital Partners, others)

Joined JK Group to lead a turnaround of all Customer Success functions, working again with a former CEO partner brought in to modernize the company for acquisition. Within two years, all CS functions were materially improved, a new platform launched, and the company was acquired by CyberGrants. Retained post-acquisition to additionally take on CyberGrants' CS functions across all product lines, driving delivery excellence and building company valuation.

- **Services Growth:** Increased implementation throughput 160% and services revenue 3x
- **Team Leadership:** Led 55-person organization including Regional Directors, driving delivery excellence across implementation and support functions
- **Migration Excellence:** Orchestrated 200+ legacy client migrations, reducing cycle time 60%
- **Operational Turnaround:** Drove call center performance from 60% to 93% answer rates

SUMTOTAL SYSTEMS, INC. | Vice President, Professional and Channel Services

Enterprise WFM & HCM SaaS (\$4M to \$200M ARR) | Parsippany, NJ | July 1998 – October 2012

Private Equity backed (Vista Equity Partners, others)

Led channel strategy and customer experience for global portfolio during 750% revenue growth, leading to successful exit and retained after acquisition.

- **Platform Expertise:** Delivered workforce management, expense management, and HCM implementations with deep integration across HR, Payroll, and ERP systems globally
- **Organizational Scale:** Led 60-person global organization including Regional Directors across US, Canada, EMEA, and APAC
- **Channel Revenue:** Built white-label partnership generating \$10M+ ARR and 500+ new accounts
- **Revenue Operations:** Transformed revenue operations improving departmental gross margin from -113% to +23% over 1.5 years.
- **Partner Ecosystem:** Increased partner win rates from 25% to 60% through comprehensive enablement

- **Global Expansion:** Managed 332 implementations across US, Canada, EMEA, and APAC, including deep technical discussions with customer IT executives on platform architecture, security, and hosting
 - **Public Sector/Government:** Managed enterprise relationships with public sector accounts including NYC Department of Education (\$25M), City of Chicago, City of Las Vegas, and Cook County IL, etc.
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AI & TECHNOLOGY

AI-Augmented CS Leadership: Deployed AI workflows (ChatGPT, Claude, Gong, LinkedIn Sales Navigator, Clay) across CS, Support, and Account Management functions at Sharpen CX, Torii, and Cascade Strategy. Designed and built CARRavan, an AI-powered NDR/GDR diagnostic prototype, independently using Claude, Lovable, ChatGPT, and Gemini as the development stack — demonstrating hands-on ability to scope, build, and ship AI-assisted technical projects. Experienced in prompt engineering, AI workflow design, and directing AI-assisted technical builds to solve CS and executive operational problems.

CORE COMPETENCIES

Go-to-Market Strategy | Channel Partnership Development | Revenue Operations | Customer Success & Retention | Team Scaling & Leadership | M&A Integration | Exit Preparation | SaaS Metrics & KPIs | Pricing Strategy | International Expansion | GovTech/Public Sector | Data Analytics & Visualization (Tableau/Looker) | Technical Presales Support

EDUCATION & CERTIFICATIONS

Bachelor of Liberal Arts | University of Tennessee, Knoxville
Certified Lean Six Sigma Black Belt | Villanova University