

# JULIO TANCUN

ADDRESS: 12101 N. Lamar Blvd. Austin, TX | PHONE: (973) 866-9983 | E-mail: Tancunj88@gmail.com

## STRATEGIC CLIENT SUCCESS LEADER IN HEALTHCARE

### Expert in Account Management, Preventive Health Solutions, and Client Retention Strategies

National Account Manager with extensive client success experience within the preventive healthcare industry, specializing in client retention and strategic health solutions. Demonstrates a proven track record in enhancing client engagement and satisfaction through data-driven strategies and personalized service initiatives. Expert in navigating complex account landscapes and fostering sustainable relationships, achieving a 95% account renewal rate through innovative health programs and effective client communication.

#### NOTABLE CAREER HIGHLIGHTS

- ✓ **Revenue Growth & Solution Upselling:** Instrumental in generating \$14 million in revenue from key accounts in 2024, with a personal contribution of over \$2 million, while also generating \$3.5 million through a workplace safety program in 2022. Focused on refining customer adoption, ensuring a strong return on investment, and advancing customer health scores and NPS.
- ✓ **Client Onboarding and Product Expansion:** Managed the successful implementation of healthcare solutions for significant new clients, including the second-largest client in the total book of business. Integrated risk management strategies to minimize churn retention challenges and optimized the customer journey. Improved customer yield while demonstrating lifetime value through quarterly and annual business reviews.
- ✓ **Streamlined Point Solutions Integration:** Designed and implemented a standardized integration framework, reducing production times by over 50% and boosting client point solution adoption by 20%, elevating overall client satisfaction.
- ✓ **Client Conversion & Upselling:** Successfully upsold and converted an executive exclusive client to our total population model, overseeing a seamless rollout and ongoing customer support, which has enhanced our service continuity and client trust.

Possesses strong analytical skills complemented by bilingual proficiency in English and Spanish. Proficient in utilizing CRM software, performance metrics, and KPI analysis to drive business growth and operational excellence. Passionate about client advocacy and data storytelling, dedicated to enriching client experiences and guiding organizational success in forward-thinking environments. Seeking to leverage an extensive background in client success to contribute to a dynamic team in a forward-thinking organization.

#### CORE COMPETENCIES

Client Relationship Management | Strategic Account Planning | CRM Software Proficiency | Data Analysis and Reporting | Performance Metrics and KPI Management | Client Onboarding and Implementation | Process Optimization | Problem Resolution | Revenue Growth Strategies | Upselling and Cross-Selling | Team Collaboration and Leadership | Compliance and Documentation | Effective Communication | Customer Advocacy and Engagement | Data Security and Privacy Protocols

#### CAREER HISTORY

##### EHE Health - New York, NY | 2023 - Present

#### NATIONAL ACCOUNT MANAGER

*As a National Account Manager in a leading preventive healthcare company, leading key account strategies and client success initiatives across a diverse portfolio. My role focuses on strengthening client relationships, improving service utilization, and propelling revenue growth through strategic planning and execution.*

- ✓ **Client Engagement Initiatives:** Developed and executed targeted engagement campaigns that boosted client interaction and utilization rates by 18%, fostering stronger relationships and energizing program success while minimizing churn risks.
- ✓ **Operational Excellence:** Led a cross-functional team to revamp client communication and process efficiency, achieving a 20% reduction in turnaround times for client requests and maximizing the overall client service experience using SaaS CRM platforms.
- ✓ **Analytics-Based Decision Making:** Utilized advanced data analysis and SMART objectives to develop tailored healthcare solutions that increased service utilization by 15%, directly contributing to a 10% growth in overall client value.
- ✓ **New Feature Implementation and Project Management:** Led the adoption of a digital wellness model through a multi-phase deployment project using Agile methods and sprints, integrating digital tools to address scope-related challenges. Successfully piloted the program, achieving measurable ROI, leading to its expansion across all client locations.
- ✓ **Customized Program Development:** Designed and launched tailored wellness programs based on client needs and market trends, resulting in a 20% increase in program adoption and client retention.
- ✓ **Contract Negotiations:** Negotiated and secured renewals for high-value client contracts, achieving a 25% increase in service pricing, expanding revenue streams, and securing long-term client commitments.

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## EHE Health - New York, NY | 2021 – 2023

## CLIENT SUCCESS ASSOCIATE

*Played a crucial role in client engagement and operational improvement at a leading preventive healthcare company, specializing in aligning client goals with strategic organizational objectives. Leveraged advanced analytical tools and skills to enhance metrics-driven decision-making and client service efficiency.*

- ✓ **Client Collaboration and Management:** Collaborated directly with clients to define and refine critical goals and key performance indicators, achieving a 20% improvement in goal alignment with organizational strategies. Managed the transition for our second-largest client by implementing a detailed plan, maintaining open communication, and providing continuous support, resulting in high client fulfillment.
- ✓ **Data Analysis & Reporting:** Utilized Excel, PowerPoint, and recently integrated Amazon Web Services to enhance data analysis and presentation capabilities, leading to a 20% increase in report accuracy and a 25% reduction in preparation time.
- ✓ **Team Leadership and Stakeholder Engagement:** Oversaw a team in delivering a critical initiative, working closely with stakeholders to address resource constraints and evolving requirements. Achieved timely completion within budget, which significantly bolstered our client relationship.
- ✓ **Operational Efficiency and Technology Integration:** Provided essential resources and data to the Client Success team, improving operational efficiency by 15% through effective data extraction, spreadsheet management, and the creation of impactful PowerPoint presentations for multiple business review meetings. Implemented a new CRM system that streamlined client data management and refined tracking and analysis of client interactions.
- ✓ **Problem Solving and Client Retention:** Resolved a complex client issue using data storytelling techniques and recognizing risk factors, which provided clear insights and actionable recommendations, resulting in a 10% improvement in client retention rates.

## EHE Health - New York, NY | 2020 – 2021

## CLIENT SUCCESS ASSISTANT

*In this key support role, streamlined administrative processes and improved client onboarding procedures, significantly improving efficiency and client response capabilities within a leading preventive healthcare environment.*

- ✓ **Administrative Operations:** Spearheaded the management of crucial administrative tasks, optimizing scheduling, correspondence, and documentation workflows. Achievements include a 15% improvement in overall workflow efficiency and a 10% faster response time to client inquiries.
- ✓ **Incentive Campaign Oversight:** Effectively managed and tracked the progress of incentive campaigns, ensuring meticulous accuracy in reporting and swift resolution of patient inquiries, resulting in a notable 25% reduction in query resolution times.
- ✓ **Streamlined Client Onboarding:** Orchestrated the onboarding process through customer-centric strategies for new clients, ensuring smooth integration and timely delivery of services, while upholding strict documentation and compliance standards.
- ✓ **Innovative Process Enhancements:** Proactively identified and implemented innovative process improvements, steering initiatives that boosted team productivity by 20%, fortifying both team performance and client gratification.

## EDUCATION

**Bachelor of Science in Marketing** | William Paterson University | May 2019

## CERTIFICATION

**Certified Customer Success Manager (CCSM)**  
*Issued by Success COACHING (CPD Certified)*

**Certified Customer Success Specialist (CCSS)**  
*Issued by Customer Success U*

**Certified Associate in Project Management (CAPM)**  
*Issued by Project Management Institute (In Progress)*

## EXTRACURRICULAR ACTIVITIES

**William Paterson University Student Government Association, Member**

- ✓ Assisted in organizing career fairs, networking events, and leadership development workshops for the student body.

**William Paterson University Volunteer Club, Event Organizer**

- ✓ Led volunteer groups in service projects, including food drives, tutoring sessions, and environmental clean-up efforts.

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