

# DILSHAD (DEE) KACHRA

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*Customer Success Manager | SaaS | Retention, Adoption & Growth*

## PROFESSIONAL SUMMARY

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Customer Success professional with experience managing a \$1M+ ARR portfolio of 120+ B2B SaaS accounts across FinTech and HealthTech. Strong background in retention, adoption, value realization, renewal strategy, and cross-functional customer leadership, with a track record of driving strong commercial outcomes and long-term customer relationships.

## PROFESSIONAL EXPERIENCE

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### Corporate Account Manager, Sage

*Feb 2024 – Oct 2025*

- Closed fiscal H1 2025 at 114% of renewal quota, ranking at the top of Sage's CAM leaderboard and earning the company's Renewal Excellence Award.
- Converted approximately 25% of portfolio customers to three-year agreements, securing longer-term revenue commitments and reducing annual renewal cycles.
- Leveraged QBRs to uncover evolving business needs and align customers with relevant Sage Intacct capabilities. Coordinated internal resources to resolve blockers and drive next steps.
- Identified customer knowledge gaps and coordinated with Customer Success Advocates to deliver targeted product demos, supplementing with self-service literature to drive feature adoption.
- Proactively managed renewal risk by monitoring customer engagement and stakeholder responsiveness, closing approximately 95% of renewals one month ahead of schedule.
- Partnered with Sage's Value team on at-risk accounts to assess customer business needs, quantify the value of Sage Intacct, and reinforce ROI with key stakeholders in support of renewal.

### Speech-Language Pathologist, Eastside Medical Center and Let's Talk Therapy (private clinic)

*2015 – 2021*

- Managed a 35+ client caseload across hospital and private-practice settings, driving strong client engagement and retention through individualized plans and measurable outcomes.
- Drove progress toward defined clinical outcomes through data-based intervention and stakeholder engagement, with successful discharges requiring 80%+ goal mastery.
- Conducted 25+ evaluations monthly, identifying client needs and translating findings into actionable recommendations, goals, and next steps.

### Earlier Experience

**Educational Mentor / Substitute and ESL Teacher, Gwinnett County Public Schools**

**Business Analyst, Ceridian**

**Software Implementation Consultant, Clarus (acquired by Epicor) — eProcurement & eMarket**

## EDUCATION

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**Master of Education (MEd), Communication Science and Disorders — Valdosta State University**

**Bachelor of Science, Materials Management / Procurement — Arizona State University**

## TRAINING & CERTIFICATIONS

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- RecastSuccess — Customer Success Manager Apprenticeship, 2023
- Maven — AI-Powered CSMs: From Reactive to Strategic, February 2026
- Angeline Gavino — AI Strategy for CS Leaders, January 2026
- Lead2Scale — CS Leadership Program (in progress, started September 2026)