

David “Drew” Groves

Implementation & Onboarding Customer Success Manager

PROFILE

Implementation and Onboarding Customer Success Manager with 4+ years of B2B SaaS experience guiding customers from discovery and requirements gathering through configuration, training, launch, adoption, and handoff. Combines consultative workflow expertise with disciplined stakeholder coordination, risk management, and change enablement.

CORE STRENGTHS

- Implementation Project Management
- Customer Onboarding
- Discovery & Requirements
- Solution Scoping
- Workflow Configuration
- CRM Integrations
- Template & Content Migration
- Launch Readiness
- Customer Training
- Change Management
- Risk & Issue Management
- Time-to-Value

EDUCATION & CREDENTIALS

Praxis (Discover Praxis), Certificate of Graduation, 2021 | ServSafe Manager Certification

PROFESSIONAL EXPERIENCE

Customer Success Manager, Enterprise

Nov 2022–Feb 2026

PandaDoc — Remote

- Led complex post-sale implementation and workflow-consulting engagements, translating business requirements into phased launch plans, configuration decisions, training, and handoff.
- Scoped templates, CRM and business-tool integrations, approval workflows, CPQ rules, and conditional logic; partnered with Solutions Engineering and TAM on API and advanced CPQ requirements.
- Managed stakeholders, milestones, dependencies, and risks through POC changes and technical blockers using structured reviews, action plans, and asynchronous updates.
- Coordinated Product, Support, Content Conversion, Technical Account Management, and Solutions Engineering to resolve implementation blockers and align solutions with customer outcomes.
- Recovered a complex migration by coordinating Product and TAM and moving 15 ~100-page templates from legacy Smart Content to the native platform; restored adoption and helped grow the account 50%.
- Re-scoped a stalled international implementation into a company-wide rollout serving 200+ users and an API plan supporting 250,000 documents annually.

Onboarding Specialist

Nov 2021–Nov 2022

PandaDoc — Remote

- Onboarded 300+ customers through discovery, configuration, CRM and business-tool integrations, template migration/conversion, training, launch readiness, and handoff.
- Simplified onboarding documentation and delivery with the broader team, reducing average time-to-value from 90 to 45 days.
- Delivered administrator and team training using train-the-trainer methods; led recurring onboarding clinics and internal enablement across the Americas, Europe, and APAC.

Business Development Intern

Jun 2021–Oct 2021

Ramblin Jackson — Remote

- Generated pipeline through LinkedIn, cold calling, email outreach, and consultative discovery; completed 1,000+ prospect calls and qualified interested leads for handoff.

Assistant Store Manager

Jan 2015–Jun 2021

Panera Bread — Columbus, OH

- Led daily operations, hiring, training, scheduling, and customer issue resolution; built staffing to approximately 40–45 employees and supported new or stabilizing cafés through Pro Team assignments.