ADITI NAIR

CUSTOMER SUCCESS | SAAS IMPLEMENTATION & ADOPTION | CUSTOMER INSIGHTS

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PROFESSIONAL SUMMARY

Senior Client Success Analyst with 7+ years of professional experience, including 3+ in B2B healthcare SaaS. Supported 30+ Core and Enterprise accounts alongside Account Owners at Phreesia. Hands-on experience configuring and testing customer workflows, resolving escalations and translating client requirements into approved changes. Prepared customized reporting and business-review analysis to help clients understand usage and product value. Uses AI-assisted analytics alongside customer judgment and cross-functional follow-through.

CORE SKILLS

Customer success: stakeholder management, customer engagement, account coverage, escalation management, retention-risk flagging and cross-functional coordination

Customer insights: product usage and workflow analysis, customized reporting, add-on ROI analysis, Executive Business Review (EBR) and Quarterly Business Review (QBR) customization

Implementation and adoption: requirements gathering, workflow configuration, test workflows, quality checks, client approvals, rollout readiness and post-change follow-up

Independent project methods: onboarding funnel analysis, user journeys, success metrics, experiment design and proposed pilot planning using synthetic data

Applied AI: analytics assistance, meeting documentation and email drafting; AI-assisted research and prototyping with human-review workflows

Domain: healthcare IT, EHR-market SaaS (Allscripts / Veradigm)

Tools: Microsoft Excel, Microsoft PowerPoint, Salesforce, Zendesk, Jira, Confluence, ChatGPT, GitHub, Lovable

PROFESSIONAL EXPERIENCE

Senior Analyst - Client Success | Phreesia India **Apr 2024 - Jun 2026**

- Supported 30+ Core and Enterprise healthcare SaaS accounts alongside Account Owners; handled client queries and account coverage during their absence in the Allscripts (now Veradigm) market.
- Configured customer workflows and screeners directly after progressing from Implementation-team coordination. Reproduced issues in test workflows, incorporated client feedback and checked approved changes before go-live.
- Prepared client-specific weekly, fortnightly, monthly and alternate-monthly reports on workflow performance, product usage and add-on ROI, separate from scheduled business reviews.
- Customized Analytics-prepared EBR/QBR materials with client-requested analysis; participated in Account Owner-led reviews and tracked requirements, decisions and follow-up actions.
- Re-engaged a previously difficult-to-reach client through hands-on workflow troubleshooting and tested configuration changes; became a direct contact for ongoing requests and follow-through.
- Flagged disengagement and unresolved workflow concerns to Account Owners, coordinated internal follow-up and kept clients informed through issue resolution to support retention.
- Identified additional product needs in client conversations and shared cross-sell opportunities with Account Owners for commercial follow-up.
- Used AI tools to assist with analytics, meeting documentation and follow-up email drafting.

Analyst - Client Success | Rayden Interactive (Phreesia partner) **Feb 2023 - Apr 2024**

Worked on Phreesia accounts through Rayden Interactive; the role transitioned to Phreesia India in April 2024.

- Clarified client workflow requirements, coordinated changes with the Implementation team and followed requests through to completion.
- Prepared account reports, followed up on client queries and implementation progress, and kept customers informed of next steps.

Customer Delight | Amazing Greys **Sep 2021 - Feb 2023**

Early-stage consumer brand, Bengaluru

- Handled customer relationships, Shopify operations and marketing support.
- Reviewed recurring customer feedback to identify service friction and improve the customer journey and day-to-day operations.

Marketing Executive | BMW Deutsche Motoren, Bangalore **May 2020 - Sep 2021**

- Developed sales plans and maintained daily, weekly and quarterly forecasts while supporting campaign analysis and brand materials.
- Managed marketing budgets above INR 10 lakhs.

- Resolved priority customer escalations in a high-touch automotive environment and coordinated with marketing and commercial stakeholders on campaign execution and customer communication.

Software Development Engineer | EaganSoft **May 2018 - Sep 2019**

Early-stage software company, Bengaluru

- Developed and tested application updates, investigated and resolved bugs, and supported iterative software releases.
- Built an early foundation in software quality, structured problem-solving and working with developers on product delivery.

INDEPENDENT AI AND PRODUCT PROJECTS

Independent AI-assisted projects using synthetic data or prototypes. Proposed experiments and pilots are not measured customer results.

SignalPath | AI Customer Success and Funnel Analytics Prototype **Aug 2026**

- Analyzed synthetic onboarding data to identify account drop-off and a module-level anomaly; prioritized a fictional customer workflow for investigation.
- Designed a Detect-Investigate-Demonstrate workflow with human testing and approval controls; defined completion, error rate, escalations and completion time for a proposed pilot, not yet run.

Case study: aditinair.in/work/signalpath

Amicus Vera | Independent Responsible AI Product Concept and Prototype **Jul 2026 - Present**

- Defined users, journeys and requirements for an older-adult companion concept, including consent, non-diagnostic behavior and human-escalation boundaries.
- Published an AI-assisted clickable prototype; not connected to a live AI model or database and not yet validated with target users.

Case study: aditinair.in/work/amicus-vera

Swiggy Delay Recovery | Independent Product and Analytics Case Study **Aug 2026**

- Analyzed 600 synthetic orders to explore preparation delays and late cancellations; proposed a recovery journey and controlled experiment with a 10% exposure cap.
- Defined reorder rate as the proposed primary measure, with satisfaction, support contacts and margin as guardrails; independent case study, not measured Swiggy results.

Case study: aditinair.in/work/swiggy-delay-recovery

ClearGate | Independent AI Adoption and Data-Protection Prototype **Sep 2026**

- Built an AI-assisted browser prototype checking selected PDFs locally for limited sensitive-data patterns, with conditional routing and human-review paths.
- Designed task-context, data-minimization and audit-trail flows; fictional prototype, not a production security control.

Case study: aditinair.in/work/cleargate

EDUCATION

Bachelor of Engineering, Computer Science **2012 - 2016**

Takshshila Institute of Technology, Rajiv Gandhi Proudyogiki Vishwavidyalaya, India

CERTIFICATIONS

- Google AI Essentials, Google (September 2026)
- What Is Generative AI?, LinkedIn Learning
- Introduction to Prompt Engineering for Generative AI, LinkedIn Learning

LANGUAGES

English, Hindi, Malayalam