

# WIL HINES

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**Customer Experience Management Consultant**  
who specialises in strategically scaling & optimising customer facing organisations.

## Specializations

Start-up & Large Team Leadership | Automation & Bot AI | Contact Center Management  
Management Development | FinTech/Financial Services | Strategic Planning  
Budgeting & Staffing | Policy & Content Development | Insurance & Benefits  
Revenue Growth Coaching & Mentoring | Outsourcing | Community Outreach

- Builds, scales and enhances large global teams.
- Manages & consults for diverse high growth environments from early start-up through Initial Public Offering (IPO) to complex multi-site and international outsourcing customer servicing structures.
- Hands-on experience directing all facets of business leading to transformations: exceeding financial goals, improving marketing, efficiency, deflection/automation strategies, compliance & risk mitigation.
- Data whisperer: analyses quantitative and qualitative sources to derive strategic insights, leading to elevated & exceptional customer experiences.

## Career Journey

### Hines CX | Wellington

CX Consultant | 2021-Present

Provide specialised CX consultation for support teams across a broad range of industries including Fintech/Financial Services, Insurance & Benefits, HR, Retail/Hospitality & other industries. In working with clients, develop a personalised plan to improve operations, hiring/staffing strategy, efficiency and the customer experience, helping companies achieve objectives and reach long-term goals.

- Utilise decades of hands-on experience and training to provide high caliber evaluation, communication and execution to clients.
- Evaluate current support health and detail the opportunities and methods to improve CS operations.
- Track record of improving the efficiency of systems/processes, including the adaptation of additional automations and bots to deflect contacts, improve resolution time & reduce agent work per contact.
- Use a data driven approach to identify and build quantitative insights & advanced reporting tools to ensure data is the backbone behind informed decisions for organisations. Developed 75+ custom branded reports within multiple workbooks & initiated monthly executive reports for a client.



### Koda Support Solutions | Sydney, NSW (Remote)

Partner | 2021-Present

Koda Support is a multinational consulting practice on a mission to turn customers into brand advocates, improve employee engagement, deliver shareholder results and guide organisations to the ideal technology enhancements for their business. As a partner, add value to the firm through the development of new products, by providing technical & experiential expertise and through coordination with partners & clients. Koda partners with leading support solutions to provide increased depth of knowledge for clients.

- Partnership Agreements with Zendesk, Intercom & Freshwork to provide expert analysis to businesses regarding the best help desk software solutions tailored to their business. Implementations for new clients, optimisation and management of CX services for existing clients of CX software suites.
- Partnership with Ada AI to provide additional bot/automation support for businesses beyond CX

software capabilities to maximise automations and customer deflection. Partnerships with Shopify, Aircall & Medalia to provide additional supplementary expertise to support clients.

- Invent and enhance proprietary assessment tools to evaluate the health and opportunities of support organisations and identify the best CX software to maximise effectiveness of CX tools.
- Work with clients to identify, scope and execute operational needs including process changes, Help Centre content, macros and standard operating procedures (SOP), manager & service training, and the creation of a Quality Assurance program to improve efficiency, proficiency and CX.



### **Rippling | San Francisco, CA**

Customer Support Manager - Insurance & Benefits | 2020-2021

Orchestrated the expansion of Insurance & Benefits customer support for a post-Series B employee management platform through a dynamic insurance enrollment season. Facilitated the development of vital infrastructure and collaborated with cross-functional partners to make product enhancements. Managed high customer volume in a fast-paced environment, while doubling the workforce.

- Rapidly learned the U.S. insurance/benefits industry to become a subject matter expert (SME) and developed an understanding of the customer journey and friction points.
- Worked with a cross-functional team, including Engineering, Content, Design, Account Executives, and Implementation to identify infrastructure needs, process and informational gaps, and build expectations for team members resulting in an enhanced customer experience and product improvements.
- Propelled efficiency, and profitability through the expansion of Help Center content, macros and standard operating procedures (SOP).



### **Step Mobile Bank | Palo Alto, CA**

Head of Customer Experience | 2019-2020

Directed the customer experience for a mobile banking app post-Series A from a pre-launch waitlist and early testers through initial launch phases. Staged hands-on development of systems, automation, data structuring and collaborated with Engineering, Product, Design, Marketing, Fraud/Compliance to develop a great product and customer experience.

- Researched profiles of young adult customers and their families, mapped customer inquiries and identified quantitative paths to critical insights to accelerate informed business decisions.
- Managed an amazing experience for early customers, with formation of a servicing ethos program, resulting in a 91.3% Top Two Box Percentage (T2B%) customer satisfaction score.
- Prepared organization to scale, increased efficiency and profitability. Acted as the architect of automation, including use of multiple bot methodologies, and improved efficiency with use of macros, automatic tagging and routing along with specialized work queues.



### **LendingClub Bank (NYSE: LC) | San Francisco, CA**

Senior Manager - Member Support | 2019

Manager - Member Support | 2016-2019

Senior Supervisor - Member Support | 2015-2016

Supervisor - Member Support | 2014-2015

Member Support Representative | 2013-2014

Built and scaled customer support and sales infrastructure during a period of high growth and rapid evolution, from a start-up to a publicly traded company, complete with robust training, procedures, QA, performance management systems, incentive programs & internal communication programs. Directed multiple verticals, including the migration and scaling of Automobile Refinance and Consumer Advocacy (complaint mitigation & credit reporting). Improved agent effectiveness across the organisation, while also managing core product operations and decoding data into insights.

- Transformed the customer experience (CX), in conjunction with Marketing, Engineering, Product, and

Design. Identified friction at every stage of the customer lifecycle, driving significant organisational change and increased revenue generation.

- Simultaneously migrated, stabilised and scaled Automobile Refinance service, leading to significant improvements in the applicant journey, that resulted in a 94% reduction in abandonment rate and an 178% improvement in service level, with increased conversion & originations.
- Collaborated with Learning & Development to build and deliver “Lending Care” – an ethos of care based on customer-centric service into an 800-person organisation. Training resulted in a 27% increase in net promoter score (NPS).
- Piloted “channel of choice” omnichannel servicing with the addition of text, chat and social media.
- Managed the first footprint expansions to international BPO sites and established the second customer care site in Lehi, UT. Rapidly staffed up operations via additional lower-cost geographies, amplifying organisational sophistication and stabilising a network beyond a single-site.
- Directed hiring, staffing, and budgeting for multiple sites and functions through high growth (YoY growth final 12 quarters) and site-specific staff reductions.
- Weaponized data into actions. Utilised data to create advanced performance scorecards & improve CX.
- Migrated credit underwriting functions to Support, planned & executed training, procedural content, and coordinated the ramp of employees on fraud mitigation processes
- Scaled and migrated systems to evolve the contact center, including telephony, CRM and data migration, WFM and QA systems, new reporting tools and business continuity planning.



### **Recreational Equipment, Inc | Santa Barbara, CA**

Sales Manager (formerly Assistant Store Manager) | 2011-2013

Operations Supervisor | 2006-2011

Frontline Specialist | 2001-2006

Acted as brand ambassador for Recreational Equipment, Inc. (REI), relocated to Santa Barbara to build and scale the first retail location in-market. Directed opening operations, including hiring, community outreach, and operational management. Managed store through ramp process and derived strategic insights from data to exceed performance standards resulting in the store receiving New Store of the Year honors.

- Established brand in-market via community outreach, collaboration with government agencies, educational classes, and commerce outreach.
- Scaled market footprints, including opening of second Santa Barbara market location in Ventura. Expanded San Francisco market coordinating the hiring clinic for Marina location, and supported grand opening for Mountain View and Brentwood locations.
- Surged inventory performance results, worked with corporate to adjust assortments to maximise sales, achieving high contribution margins while improving inventory churn rates.
- Developed customer-facing employees and leaders in servicing/sales, performance management, data analysis, budgeting, visual merchandising, payroll, and other retail skills.
- Managed store finances, including the general ledger, exceeded stretch goals for operating costs and contribution margins and other KPIs.

### **Education, Additional Skills, Development & Assessments**

**Bachelor of Arts - History:** California State University, Long Beach | Long Beach, CA

**Management Training:** Retail Management Training, PEAK/Leap Training, Total Responsible Person Training, Strengthsfinder Training

**Certifications:** Zendesk: Zendesk Support Administrator Expert I, Messaging, Explore/analytics; Ada: Identifying an Ada Customer; Intercom: Build an effective Conversational Support team, Become an SDR Pro, Become a Conversational Support Expert

**Business Tools & Systems:** SQL Developer, SQL Workbench, Tableau, Qualtrics – Vocalize, Cisco

Unified Intelligence Center, Trello, Figma, BigQuery, Calabrio, Salesforce, ZenDesk, Intercom, Freshdesk, Ada AI, Shopify, Aircall

**Office Tools:** Google Drive, Office365/Office products, Sharepoint, JIRA/Confluence

**Assessments:** Myers-Briggs – ENTJ, Strengthsfinder (top 5) – Strategic, Achiever, Woo, Competition, Positivity

### **Volunteer Experience**

**Lions Club International:** Supported fundraising events that contributed to charter support for other non-profit organizations and grants for underserved youth.

**Scouts of America:** Facilitated youth advancement through scouting program as an adult leader, including as a guide for a backpacking trip through the Lost Coast. Directed Nature department as a camp counselor.

**Environmental Clean-up & Testing:** Participated in multiple beach, creek and river clean-up service projects to clean California beaches & worked with Santa Barbara Channelkeepers to complete water testing.

**East Anacapa Island Restoration:** In cooperation with the National Parks Service, journeyed to Channel Islands National Park to work on the park ecosystem with native plant restoration.

**Athletic Coaching:** Coached baseball and softball teams, providing instruction and leadership.

**References available upon request**