JULIO C. LOPEZ

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OVERVIEW

Customer Success and Strategy leader with 15 years of experience building and scaling post-sale functions across SaaS, MarTech, and AI. Track record of progressing from individual contributor to executive leadership, creating high-performing teams and advising enterprise customers across $80M+ ARR portfolios. Combines executive-level customer strategy with hands-on operating model design, renewal and expansion enablement, and cross-functional execution. Recognized for retention, revenue growth, operational efficiency, and team development.

EXPERIENCE

VALIDITY, New York, NY ***AI/ML Email Productivity MarTech*** April 2026 – Present

Senior Customer Strategist

- Recruited to the senior leadership team to help scale the Customer Strategy function, partnering directly with the SVP to strengthen GRR, NRR, and operational efficiency across the organization.
- Responsible for leading key enterprise renewal strategies and developing scalable expansion initiatives that support company-wide results of 91% GRR and 104% NRR.
- Advise cross-functional teams on executive engagement, value articulation, and strategic account planning, connecting core and new capabilities to customer business outcomes.
- Drive cross-functional coordination and scalable account workflows to improve risk visibility, sales enablement, and consistency of renewal and expansion execution.

MOVABLE INK, New York, NY ***AI/ML Personalization MarTech*** April 2018 – March 2026

Vice President, Strategy (January 2024 – January 2026)

- Led a 10-person team focused on driving adoption, retention, and expansion across strategic retailers, delivering 15% ARR growth, +31% gross retention, and +41% net retention vs. unsupported accounts.
- Served as the head of Movable Ink's Retail practice, representing the company at major industry conferences, in executive client forums, and owned senior client relationships to guide long-term partnership planning.
- Collaborated with Product and Engineering teams to design, test, and roll out a client-facing analytics UI, scaling self-service goals that improved operations efficiency while ensuring alignment with client needs.
- Oversaw the creation of 161 thought leadership assets, including the company's most attended client webinar focused on iOS18.2, which alone influenced +$4 million in incremental bookings in addition to client renewals.

Senior Director, Strategy (January 2022 – January 2024)

- Scaled team to eight direct reports, including the creation and oversight of a new AI Analytics Department, supporting retail ARR growth of 43% while surpassing company-wide growth of 36%.
- Contributed to $1.3B unicorn valuation by overseeing 57% of company ARR and partnering with Sales to drive gross retention 17 points and net retention 29 points higher than unsupported retail accounts.
- Sustained total eSAT scores eight points above industry benchmark over two years, with *"I would recommend my manager to others"* consistently scoring +10 - 15 points above the benchmark.

Director, Strategy (April 2020 – January 2022)

- Created and led a three-person customer-facing team that directly supported retail ARR growth of 69%, exceeding company-wide ARR growth of 53%, and increasing retail's share of total revenue to 52%.
- Spearheaded retail-specific insights and programs that stabilized retention and expansion, helping drive retail client count growth of 5% in the face of the global COVID-19 pandemic and the Apple iOS15 privacy updates.
- Achieved gross retention rates 11 points higher and net retention rates 19 points higher than unsupported retail accounts through proactive value articulation, executive engagement, and renewal planning.

Associate Director, Strategy (April 2018 – April 2020)

- Joined as an individual contributor to establish the Strategy Team at a growth-stage startup, designing an operational plan focused on ownership of diverse consulting projects, and industry thought leadership.
- Directly supported a named list of 100 high ARR enterprise clients, achieving gross retention rates 8 points higher and net retention rates 13 points higher than unsupported accounts.
- Identified winning strategies through data analyses resulting in 108% retail ARR growth, outpacing company-wide growth of 75%, and increasing retail's ARR share to 40%.

EVERSIGHT by INSTACART, Madrid, Spain ***AI/ML Pricing Experimentation*** January 2017 – April 2018

Manager, Retail Operations (January 2017 – April 2018)

- Scaled client support from an individual contributor role to leading a two-consultant team, overseeing strategic workstreams, and ensuring execution against joint client-vendor priorities.
- Operationalized machine-learning powered pricing strategy as a full-time on-site consultant at Carrefour Spain, driving adoption of Eversight's proprietary tech across category merchants.
- Facilitated data integration between Carrefour's tech team and Eversight's engineering group, creating an actionable roadmap to accelerate AI/ML model training.

REVTRAX, New York, NY ***Offer Personalization Tech*** February 2013 – January 2017

Director, Customer Success (August 2016 – January 2017)

- Led the full Customer Success organization, managing 15-20 team members across retail and CPG verticals, overseeing post-sale outcomes for 90% of accounts and ARR comprising mid-market and Fortune 100s.
- Co-developed go-to-market strategies with the C-Suite to evolve product positioning and expand market share, while implementing organizational changes to support efficiency.
- Collaborated with Product, Tech, and Marketing teams to enhance the platform and develop new features based on client feedback, retention drivers, and market trends.
- Co-led net-new and expansion sales cycles, reinforcing alignment between Sales and Customer Success.

Associate Director, Customer Success (January 2015 – August 2016)

- Managed 45% of company ARR and improved internal workflows to increase ARR per headcount.
- Directed the CPG vertical, managing 8-10 team members across Customer Success and Digital Operations.
- Designed, launched, and oversaw an automation-focused Digital Operations team that reduced campaign setup time by 77% and was scaled to handle 85% of all campaigns.
- Built automated reporting workflows that generated client-ready decks and data visualizations, cutting time-to-insight by 83%, resulting in increased team capacity and improved customer communication.
- Partnered with Sales leadership on renewal upsells and churn prevention.

Senior Account Manager (January 2014 – January 2015)

- Directed 20-40 enterprise accounts, including Dannon, Stonyfield, and Advance Auto Parts, delivering digital promotion strategies averaging 5-7x ROI.
- Supervised 3-4 junior team members, providing mentorship, campaign oversight, and performance feedback.

Strategic Account Manager (February 2013 – January 2014)

- Joined as an individual contributor to serve as the primary contact for 15-20 enterprise CPG and retail clients including Starbucks, Welch's, and Mead Johnson.
- Developed, implemented, and managed digital offer campaigns using RevTrax's proprietary platform, spanning email, social, affiliate, website, search, and display.
- Delivered QBRs and ongoing performance analyses to senior client stakeholders, providing actionable recommendations to improve results.

EXPERIAN CHEETAHMAIL, New York, NY ***Email Service Provider*** October 2010 – February 2013

Account Manager (October 2010 – February 2013)

- Joined as an individual contributor to manage day-to-day operations of high-volume email marketing campaigns for Hallmark, Norwegian Cruise Lines, and NFPA, optimizing and influencing CRM strategy.
- Analyzed campaign performance metrics to identify optimization opportunities such as testing strategies, remarketing workflows, and triggered email programs.
- Collaborated with clients' vendors like ReturnPath, Movable Ink, and Litmus to execute campaigns that met annual performance goals.

EDUCATION

CUNY BARUCH, ZICKLIN SCHOOL OF BUSINESS, New York, NY
Master of Business Administration, 2021

- Valedictorian & Class Speaker, Beta Gamma Sigma

CUNY BARUCH COLLEGE, New York, NY
Bachelor of Business Administration, 2010

ADDITIONAL INFORMATION

- *Community Leadership*: Co-founder of RiseOut, a community to connect and create role models for the next generation of business leaders.

- *Select Media:*
  - [Video] Strategizing Customer Retention: Plugging Retail's Leaky Bucket
  - [Video] From Inbox to Insight How Automation and AI Are Reshaping Email Marketing
  - [Video] Unprecedented Times, Precedented Solutions Personalization That Performs
  - [Articles] From Total Retail, TechCrunch, VentureBeat

- *Additional Languages*: Fluent in Spanish