

JOSHUA J. LYONS

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Customer Success professional with over 25 years in Digital Technology & Cybersecurity. Specializes in **recovering at-risk Enterprise accounts** & converting them into referenceable partners who expand their spend. Track record spans SaaS, Cloud Infrastructure, & InfoSec/Compliance — consistently achieving 100% retention & double-digit NRR growth. Builder by nature: has built CS functions from scratch, custom platforms on Salesforce, & **AI-powered workflows** now used across CS and Sales organizations.

PROFESSIONAL EXPERIENCE

Sr. Customer Success Manager | Cloudflare, Inc.

Oct 2024 - May 2026 | Remote

Position eliminated in company-wide RIF, May 2026 (1,100 employees / ~20% of company)

- Maintained 100% logo retention and 20% expansion revenue growth across 20 Enterprise accounts (avg \$600K ARR; range \$400K-\$1.8M) over 5 quarters
- Prevented churn of 6 high-risk accounts, protecting ~\$4M ARR — including one account that had cycled through multiple CSMs; stabilized within 6 months and renewed with a 10% ARR increase
- Generated \$300K+ in net-new ARR by sourcing and introducing 3 new logos to Cloudflare's sales team — outside the assigned book of business
- Built AI-powered CS & Sales workflow tools deployed across the organization: negotiation guidance skill (Black Swan methodology), automated file organization & post-meeting brief generation, and MCP-integrated customer research workflows — built using OpenCode & Windsurf (Claude Opus 4.x); work featured in CS team meetings, CS org newsletter, and led to invitation to join the GCS AI Task Force
- Monitored account health scores and churn risk indicators in Gainsight across 20 Enterprise accounts — using adoption signals and usage data to prioritize proactive outreach, identify expansion opportunities, and exceed CS Qualified Lead (CSQL) quota every quarter

Director, Customer Outcomes | Infolock

Dec 2018 - Apr 2024 | Remote

Promoted from Customer Success Manager - Director, Customer Success - Sr. Director, Customer Outcomes

- Founding CSM; built the Customer Success function from scratch while owning a \$2M+ ARR Enterprise & Mid-Market book — sustained 100% retention for 3+ consecutive years through cross-functional stakeholder management
- Ran full customer lifecycle: onboarding, implementation, success planning, optimization, renewal, and expansion
- Increased account ARR 10-25% YoY in partnership with Sales; maintained 100% renewal rate annually with average NPS of 9.5 and reference account attainment at 166% of goal
- Designed onboarding process that reduced time-to-first-value by 33% and raised implementation CSAT by 28%
- Built a custom CS platform on Salesforce that increased CSM efficiency 20% and reduced errors 25% in year one, while delivering key data insights to executive leadership
- Created first-ever Voice of the Customer program achieving ~100% response rate, generating actionable insights and revenue opportunities
- Expanded CS scope from 1 to 4 lines of business; authored 50+ SOPs, playbooks, and customer-facing deliverables (inc. QBR/EBR frameworks), standardizing execution across the entire CS team

Director, Client Relations | Fortrex Technologies

Dec 2000 - Dec 2018 | Hybrid

- Achieved 115% average quota attainment (2013-2018) on \$1M annual target managing 30 key national and 25 Mid-Market/SMB accounts
- Grew company's largest account from a \$15K consulting engagement to \$500K ARR over 12 years — retained through acquisition and multiple leadership transitions
- Extended 75% of customers from 1-yr to multi-year contracts; served as primary Salesforce administrator for 12 yrs
- Represented Sales/AM on the leadership team, counseling the President on corporate sales strategy and direction

Director of Client Services

Dec 2008 - Dec 2012 | Frederick, MD

- Led onboarding of Mid-Market customers onto 3rd Party Risk Mgmt SaaS with 95% renewal rate; reduced average onboarding completion time by 65%
- Managed 50 concurrent client engagements with 60% conversion from one-time to repeat; led a team of 10 consultants and engineers with zero turnover

Regional Sales Manager / Director of Sales (Mid-Market & SMB)

2005 - 2008 | Frederick, MD

Account Manager / Inside Sales / Vendor Relations / Purchasing

2000-2005 | Frederick, MD

CERTIFICATIONS

CCSM Level II • Cloudflare One Fundamentals • Symantec DLP / CloudSOC Specialist • HITRUST CCSFP