DYLAN **HASTINGS**

Senior Customer Success Manager

Remote



CONTACT

(315) 854-3564

dylan@dylanhastings.com

linkedin.com/in/dylanhastings

SKILLS

Customer Success
Client Retention
Account Management
Executive Engagement
Strategic Planning
Consultative Selling
Business Reviews
Success Planning
Revenue Growth
Escalation Management
Risk Mitigation
Change Management
Systems Integration
Data Analysis
Cross-Functional Collaboration

TECHNOLOGY

Salesforce
CRM Platforms
Reporting Dashboards
Analytics Tools
Systems Integration
Payment Platforms

REFERENCES

References available on request.

EDUCATION

Lisbon Central School
June 1999 | Lisbon, NY

PROFILE

Strategic, relationship-driven leader with extensive experience partnering with clients in highly regulated and operationally complex environments. Proven ability to drive client retention, revenue growth, and long-term success through consultative engagement, executive alignment, and data-driven planning. Skilled at translating technical and regulatory requirements into actionable business solutions, leading cross-functional collaboration, and mitigating risk to protect client outcomes. Trusted advisor recognized for executive communication, operational insight, and delivering measurable results.

EXPERIENCE

Sunrise at La Playa, LLC (June 2025 – February 2026)

Technical Operations Manager | Santa Rosa Beach, FL

- Partnered with property owners as strategic advisors, optimizing platform performance, pricing strategy, and digital presence to drive revenue growth and client satisfaction.
- Led integration and management of booking, payment, analytics, and operational platforms, ensuring seamless system performance and data integrity.
- Analyzed performance metrics and conversion data to implement workflow and user-experience improvements that increased booking efficiency.
- Managed multi-channel account performance across Airbnb, VRBO, and direct booking platforms, aligning pricing and availability strategies with revenue objectives.
- Delivered performance reporting and financial projections to support homeowner onboarding and long-term portfolio growth.
- Collaborated cross-functionally to resolve system issues, improve operational processes, and enhance client experience.
- Maintained contracts, documentation, and platform data accuracy to ensure operational compliance and risk mitigation.

Hastings Mortgage Group, LLC (November 2022 – January 2026)

CEO, Mortgage Broker | Canton, NY

- Led client- and partner-facing operations, building strategic relationships to drive satisfaction, retention, and business growth.
- Designed and implemented scalable operational workflows, reporting frameworks, and performance metrics to support decision-making and service delivery.
- Managed key third-party relationships and vendor partnerships to ensure seamless service and operational excellence.
- Directed strategic planning initiatives, optimizing processes and systems to improve client experience, efficiency, and revenue outcomes.
- Oversaw issue resolution and escalations, delivering timely solutions and maintaining strong client trust.
- Developed and maintained governance frameworks, internal controls, and reporting to support operational accountability and data integrity.

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EXPERIENCE

Independent Contractor (September 2013 – January 2026)

Owner, Principle Consultant | Canton, NY

- Partnered with clients to optimize operational workflows, improve efficiency, and implement scalable business processes that enhance client outcomes.
- Led client acquisition, managed contracts, and delivered end-to-end service solutions to drive satisfaction and retention.
- Advised clients on system implementation, policy frameworks, and operational improvements to support long-term success.
- Analyzed performance metrics and provided actionable insights to support decision-making and process optimization.
- Managed multi-stakeholder coordination, including vendors, partners, and internal teams, to ensure seamless service delivery.

PNC Bank, N.A. (April 2018 – May 2018)

Relationship Manager II | Alpharetta, GA

- Managed a portfolio of clients, building trusted relationships and delivering solutions that increased retention, engagement, and long-term value.
- Leveraged CRM and reporting tools to identify opportunities, track performance metrics, and drive actionable insights for clients.
- Collaborated across internal teams to deliver holistic solutions and ensure a seamless client experience.
- Provided consultative guidance based on client needs and data analysis, supporting strategic decision-making and goal achievement.
- Addressed client issues and escalations with timely solutions, maintaining high satisfaction and trust.

Wells Fargo, N.A. (July 2012 – September 2013)

Business Specialist II | Cumming, GA

- Managed a portfolio of business and consumer clients, delivering solutions that improved satisfaction, engagement, and retention.
- Resolved complex client issues and escalations, ensuring timely, effective outcomes and maintaining trust.
- Identified opportunities to optimize workflows and processes, enhancing operational efficiency and client experience.
- Partnered with cross-functional teams to coordinate solutions, provide updates, and support client success initiatives.
- Leveraged reporting and data tools to analyze client activity, track performance metrics, and inform strategic recommendations.
- Served as a subject matter resource, training colleagues and sharing best practices to elevate team performance.

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June 1999 | Lisbon, NY

EXPERIENCE

JPMorgan Chase Bank, N.A. (September 2010 – July 2012)

Assistant Manager | Cumming, GA

- Supervised branch operations and client-facing teams, ensuring high-quality service delivery and a seamless customer experience.
- Coached and developed staff, enhancing team performance and supporting professional growth.
- Partnered with internal business units to resolve escalated client issues and deliver enterprise-level solutions.
- Led process improvement initiatives to streamline workflows, improve efficiency, and optimize client interactions.
- Prepared management reports and analytics to inform strategic decisions and track client satisfaction metrics.
- Maintained strong risk-awareness and compliance oversight while focusing on client success outcomes.

KeyBank, N.A. (August 2007 – September 2010)

Assistant/Operations Manager | Canton, NY

- Led daily operations for high-volume banking activities, ensuring accuracy, efficiency, and exceptional client service.
- Supervised, trained, and coached staff to deliver consistent, high-quality client experiences.
- Identified opportunities to enhance operational workflows and reduce errors, improving overall service delivery.
- Collaborated with cross-functional teams to resolve client issues, manage escalations, and support account growth.
- Analyzed operational data and performance metrics to inform strategy and improve client outcomes.
- Oversaw client-facing activities, ensuring timely resolution of escalated issues and maintaining satisfaction levels.