JULIAN MERCER

ONBOARDING SPECIALIST

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PROFESSIONAL SUMMARY

Onboarding Specialist with 5+ years guiding new SaaS customers through setup, training, and first-value milestones. Builds clear onboarding plans, teaches product workflows to non-technical users, and hands off healthy accounts to long-term success teams.

PROFESSIONAL EXPERIENCE

Onboarding Specialist Apr 2024 - Present
Notion, New York, NY

- Onboarded 160 team and enterprise customers a year with a standard 30-day plan, hitting first-value milestones for 88% of accounts.
- Delivered live product training to 1,400+ end users across admins and managers, rating 4.8/5 in post-session surveys.
- Rebuilt kickoff checklists and templates with Customer Success and Support, cutting average setup time from 21 days to 14 days across new accounts.
- Tracked activation signals in a CRM and contacted inactive accounts within three days with a short call and checklist, recovering 30% of stalled onboardings.
- Ran weekly group kickoff webinars for 30+ new accounts, lifting week-four activation by about eight percentage points.
- Partnered with Product on onboarding feedback, logging 25 recurring confusion points that informed three template and in-app tip updates.
- Trained two new specialists on the 30-day onboarding plan and CRM tracking, and both managed a full account load within six weeks.

Customer Onboarding Associate May 2021 - Mar 2024

- Guided 90 mid-market customers through workspace configuration, SSO setup, and channel strategy workshops.
- Created five short video walkthroughs that replaced repeated live demos and saved about eight hours a week.
- Coordinated with Support on recurring setup problems and shared the top five patterns monthly, reducing onboarding-related tickets by 19% over two quarters.
- Handed off completed accounts to Customer Success with documented goals, risks, and stakeholder contacts, so owners could start renewal planning on day one.
- Collected learner feedback after 200+ sessions and shared common confusion points with the product team.
- Maintained a library of help articles and training decks, updating them after each product release.
- Ran weekly office hours for newly onboarded admins, answering questions live and cutting follow-up tickets by about a tenth.

CORE SKILLS

Onboarding plans | Product training | Customer education | Kickoff facilitation | Activation tracking | Implementation checklists | Salesforce | Gainsight | Zoom webinars | Loom | Knowledge base writing | Handoff documentation | Stakeholder communication | Churn prevention

EDUCATION

B.A. in Communication Studies, California Polytechnic State University, San Luis Obispo, CA

CERTIFICATIONS

Gainsight Customer Success Fundamentals | Certified Customer Education Professional