

Caroline Oliveira

NJ / NY, USA | (908) 309-2080 | carolineovv@gmail.com | linkedin.com/in/caroline-oliveirav | carolineoliveira.com

PROFESSIONAL SUMMARY

Customer Success Manager with 5+ years across SaaS and fintech, skilled at developing client-facing training materials and leading onboarding and product-demo sessions. Proven ability to simplify complex concepts and drive product adoption for global portfolios while collaborating cross-functionally using Salesforce, HubSpot, and Zendesk. Passionate about educating clients, building strong relationships, and enhancing the customer experience.

PROFESSIONAL EXPERIENCE

Supplies Master

Jan 2026 – Present

Multi-Entity Financial Operations Coordinator (Part-Time) · NJ, USA

- Process vendor invoices and payments and coordinate material transfers between store locations, keeping multi-entity operations running on schedule.
- Monitor data and reporting to identify inconsistencies and improve system-wide data integrity.
- Support process improvements that increase efficiency and reduce manual errors, collaborating cross-functionally across financial and operational teams.

Forenbiz

Feb 2022 – Present

Team Lead – OSINT Investigator (Part-Time) · Remote

- Lead structured workflows using HubSpot and process-improvement methods to prioritize and track up to 10 concurrent OSINT investigations, reducing project turnaround time by 10%.
- Maintain detailed documentation and reporting systems with strong attention to accuracy.
- Act as a central point of coordination between teams, ensuring timely delivery and communication.

Adcash (SaaS)

Jan 2024 – Jun 2025

Customer Success Manager · Tallinn, Estonia

- Managed a portfolio of 150–250 global SaaS clients (~€480K revenue), driving customer retention, engagement, and revenue growth across diverse markets.
- Owned onboarding and activation KPIs, guiding new clients to product adoption and measurable value within defined timelines.
- Monitored customer performance and proactively identified churn risks, usage gaps, and upsell opportunities.
- Acted as the primary escalation point for technical and account issues, coordinating with Product and Engineering to resolve blockers and minimize downtime.
- Maintained accurate Salesforce records; translated Zendesk feedback into actionable insights and led client training sessions to drive adoption.

Wise (Fintech)

Sep 2022 – Dec 2023

Customer Support Agent · Tallinn, Estonia

- Delivered high-volume, multi-channel support (chat, email, phone) using Zendesk, consistently meeting SLAs and maintaining accuracy KPIs in the high 90s.
- Operated within a heavily regulated fintech environment, ensuring compliance with financial laws, fraud-prevention protocols, and internal risk policies.
- Handled sensitive financial and account issues with strong judgment and security awareness to protect customer data.

Freelance – Client Success & Legal Operations (Upwork)

Sep 2021 – Present

Top Rated · 100% Job Success · Remote

- Support global clients across customer success, onboarding, legal operations, and administrative coordination (Top Rated, 100% Job Success).
- Projects span customer onboarding assistance, U.S. immigration paralegal support, legal/financial investigations, and bilingual legal translation.
- Manage client communication, reporting, CRM updates, and workflow coordination across multiple concurrent projects.

JT Mann Law Firm

Mar 2022 – Sep 2022

Legal Assistant · Remote

- Managed structured documentation workflows in legal case-management software, achieving error-free records across all active cases.

Mariana Vargas Law Firm

Jan 2018 – Oct 2022

Lawyer / Legal Intern · Patos de Minas, Brazil

- Drafted, reviewed, and analyzed legal contracts and documentation; conducted legal research and supported litigation strategy while ensuring regulatory compliance.

EDUCATION

UNIPAM – Universidade de Patos de Minas

2015 – 2019

Bachelor of Laws (LLB) · Licensed Attorney in Brazil (OAB-qualified)

CERTIFICATIONS

- Customer Success Foundations Professional Certificate — ChurnZero (2026)
- Customer Success Management — LinkedIn Learning (2026)
- OSINT Certification Program — SL OCP 1 (2025)
- Data Analysis — Microsoft & LinkedIn (in progress)

CORE SKILLS

Customer Success & Accounts	Retention · Health Monitoring · Proactive Outreach · Churn Prevention · Partner Relationship Mgmt · FinTech
Onboarding & Support	Customer Onboarding · Product Adoption · Issue Resolution · Technical Troubleshooting · Client Education
Data & Tools	Salesforce · HubSpot · Zendesk · Excel & Reporting · Usage / Data Analysis
Collaboration	Cross-Functional Work · Escalation Management · Process Improvement · Product Feedback · Bilingual (EN/PT)