

DJ

Daniel Jackson

Consultant

Freelance management consultant focused on operations and customer experience for Series B to Series D software companies. Five years of engagement experience, the last two as an independent contractor working through both direct referrals and prime firms.

CONTACT INFORMATION

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KEY SKILLS

- Customer experience strategy
- Onboarding and activation
- Customer success operating models
- Journey mapping
- Voice-of-customer research
- Figma and Miro
- Looker and Amplitude
- Engagement scoping and pricing
- Subcontracting with prime firms

PROFESSIONAL EXPERIENCE

INDEPENDENT CONSULTANT | ORTIZ CX STUDIO, AUSTIN, TX
2022 – PRESENT

- Delivered 11 engagements for SaaS clients ranging from \$5K diagnostic sprints to \$96K six-week CX redesigns.
- Rebuilt the onboarding flow for a vertical SaaS client; first-90-day activation moved from 41% to 58%.
- Stood up a CS team operating model for a 60-person startup, including segmentation, playbooks, and a hiring plan.
- Subcontracted on two larger engagements for a boutique firm; owned the voice-of-customer workstream end to end.
- Run a quarterly newsletter that drives 2-3 inbound leads per cycle from former clients and operators.

CONSULTANT | BAYLINE PARTNERS, AUSTIN, TX
2020 – 2022

- Worked across CX, ops, and GTM engagements for early-stage software and marketplace clients.
- Led a churn diagnostic for a fintech client that surfaced three root causes tied to billing UX.
- Built the firm's reusable customer journey mapping toolkit, used on at least eight follow-on projects.

EDUCATION

B.B.A. Management, McCombs School of Business, University of Texas at Austin, 2019