

# JASON D. BELNICK

AI Customer Success | AI Ops | Enterprise Implementation

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Enterprise SaaS implementation leader with 12+ years turning complex customer workflows into adopted systems, clearer operating cadence, and executive-ready reporting. Led nearly 200 enterprise implementations at AuditBoard / Optro and built Professional Services operating systems through OneTrust hypergrowth. Hands-on with Claude, Codex, local model workflows, Open WebUI, OpenClaw, Hermes, browser automation, and source-grounded evaluation.

## HIRING MANAGER OUTCOMES

<b>Build adoption</b>	Turn AI-enabled product capability into onboarding plans, customer follow-up, QBR narratives, rollout risks, and expansion opportunities.
<b>Improve workflows</b>	Use AI tools to turn calls, notes, research, and repetitive tasks into reviewed assets that get better with each cycle.
<b>Make data usable</b>	Translate Salesforce, Sigma, PSA, and product data into dashboards, operating cadence, and decisions people can trust.

## AI AND OPERATING STACK

**Models and agent tools:** Claude, Codex, Qwen, Gemma 4, Ollama, MLX, Open WebUI, OpenClaw, Hermes.

**Automation and review:** Whisper transcription, browser / API automation, prompt comparison, source checks, rubrics, failure-note capture.

**Customer systems:** Salesforce, Sigma, FinancialForce PSA, NetSuite, Shopify, implementation playbooks, executive BI reporting.

## SELECTED PROOF PROJECTS

- Local Meeting Intelligence - Mac Studio workflow for meeting transcription, Qwen / local-model summarization, and judge-style comparison loops that make outputs easier to review and improve.
- AI Output Improvement - Adapted a Karpathy-style Autoresearch loop for meeting notes: compare model drafts against the transcript, score faithfulness and actionability, revise prompts, and rerun.
- Lindsay Belnick Art growth ops - Shopify and Etsy optimization for a working artist: SEO, Google Shopping, product positioning tests, and customer-behavior analysis.

## EXPERIENCE

### AuditBoard / Optro - AI-Native GRC Platform

Senior Manager, Compliance Implementation | Aug 2022 - Present

- Led nearly 200 enterprise compliance platform implementations across ITRC, RiskOversight, CrossComply, TPRM, and ITRM while managing 10-15 concurrent customer engagements.
- Partnered with Product and R&D during the AI-native GRC pivot, translating frontline customer reactions to AI features into roadmap feedback and rollout guidance.
- Built Sigma dashboards unifying control-assessment and risk data into executive-ready reporting on framework coverage, control effectiveness, adoption, and value realization.
- Closed 3 implementation-led expansion deals by translating live customer use cases into measurable ARR growth without sales engagement.

### OneTrust

Senior Manager, Business Operations - Professional Services | Dec 2019 - Aug 2022

- Built and led a 5-person Professional Services operations team through hypergrowth, standardizing delivery playbooks, operating cadence, systems hygiene, and executive visibility.
- Architected \$100K+ in annual recurring savings by designing a Salesforce-native solution that displaced a planned FinancialForce license expansion.
- Designed and implemented FinancialForce PSA inside Salesforce, systematizing time tracking, project management, delivery reporting, and operational controls across a 400+ consultant services org.
- Built executive BI dashboards tracking 400+ consultant KPIs with per-consultant views for weekly executive reviews and resource decisions.

## **KNOW Foods**

*Director of Strategic Initiatives | Mar 2018 - Oct 2019*

- Owned e-commerce P&L across Shopify and Amazon, using shipping economics, sales data, and customer KPIs to protect margin and inform marketing decisions.
- Project-managed a NetSuite ERP implementation, aligning operating processes to the system rather than forcing the system around broken workflows.
- Built B2B go-to-market motion for an early-stage food incubator, including channel pricing, weekly newsletter, structured outbound pipeline, board-level reporting, and a \$1M B2B portfolio.
- Sourced 20 net-new accounts across foodservice and retail channels.

## **Flash Furniture**

*Business Development Manager | Jul 2015 - Mar 2018*

- Grew e-commerce key accounts including Walmart, Staples, Office Depot, and Overstock 20% YoY to \$48M in managed revenue.
- Sourced \$15M in new business across 7 net-new accounts, representing 20% of total company revenue in 2017.

## **Infosys Consulting**

*Management Consultant | Aug 2013 - Jun 2015*

- Advised financial-services executives on operating model design and digital transformation, translating business requirements into system-ready specifications.

## **EDUCATION AND CERTIFICATIONS**

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Indiana University, Kelley School of Business - M.S., Information Systems

Indiana University, College of Arts and Sciences - B.A., Economics

Salesforce Certified Administrator

## **ANGEL INVESTING AND ADVISORY**

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Morning Brew - seed investor, 2017 to exit | Smpl - investor and advisor, 2019-2022