KATELYN TENSLEY

Customer Success · Onboarding & Implementation · AI Enablement

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SUMMARY

Five years as the customer success and onboarding function for a 500-agent Keller Williams brokerage: live demos for recruits, a 100-day onboarding plan for every new agent, front-line support and escalation, and the training and SOPs that keep adoption up. Raised CRM adoption from 30% to 68% and held it, trained 1,100+ agents, and was named 2024 Market Center Tech Trainer of the Year. Now building AI tools that run in production — compliance review, contact-data cleanup, event marketing — and running a subscription service with 10 of 10 clients retained.

EXPERIENCE

Director of Technology & Agent Success KW Reserve · Keller Williams · Palm Beach Gardens, FL 2021 – Present

- Customer-success lead for 500+ agents across two market centers: run live technology demos for recruits, onboard every new agent on a 100-day plan, and own the CRM and systems they depend on daily.
- Raised KW Command CRM adoption from 30% of agents to 68% in two years and retained it since; trained 1,100+ agents through CRM migrations, the Command rollout, and the move to Transact.
- Front-line support and escalation: 1–5 agent issues a day, 2,500+ sessions. Lead two business meetings and 1–2 technology classes every week. Named 2024 Market Center Tech Trainer of the Year, KW South Florida region, for highest adoption rates and class reviews.
- Built the Investor Think Tank event from scratch — 300+ agents attended, nearly half from competing brokerages — now one of the brokerage's strongest recruiting and retention channels.
- Built and run an AI compliance review that checks every submitted transaction at both offices with broker sign-off; backlog cleared to zero, new files reviewed within half a business day.
- Teach TCPA and Do Not Call compliance to every agent: DNC registry scrubbing, consent and opt-out handling, and the rules for text and call outreach. Lead a team of two agent-services directors, coaches, and virtual assistants; wrote the SOPs they run from.

Founder & Operations Lead — Agent Assist Level 10 Leverage · remote Jul 2026 – Present

- Launched a subscription back-office service for real estate agents; 10 paying clients in the first two months, all 10 still subscribed.
- Designed the onboarding, SOPs, and delivery system (member portal on Supabase and Stripe, two-way ClickUp sync, AI-assisted CRM cleanup) so two virtual assistants run day-to-day delivery without me.

Operations & Systems Consultant The Scholarly Edge · education consulting · contract, remote 2024 – 2026

- Implementation and operations for a founder-led education consulting company: designed the client journey from inquiry to onboarding, packaged the service offers, set up Asana, inbox workflows, and SOPs, and built the automated email sequences that run it — then handed it off to the founder to operate.

Operations & Communications Manager Nu BANDAGE · Palm Beach Gardens, FL 2020 – 2021

- Ran day-to-day operations and owned client accounts end to end: onboarding, delivery, reporting, renewals, and vendor coordination.

Laboratory Technician Florida State University · Dept. of Chemistry & Biochemistry 2018 – 2020

- Ran lab operations for General Chemistry I & II; built an inventory tracking system that reduced material waste.

SELECTED PROJECTS

Database Cleanup Tool Python · Claude API · github.com/katelynltensley
Dedupes and enriches CRM exports: rules first, AI only for ambiguous matches, with a cost cap. Validated on a real 500-contact export — found and fixed a two-row-header parser bug; 23 automated tests passing.

Event Marketing Automation Claude · Meta Business Suite · Eventbrite · Google Sheets
One spreadsheet drives a month of flyers, posts, registration links, and agent texts for both offices (34 events, ~40 posts in October). Saves about 28 hours a month.

SKILLS

Customer success	Onboarding plans, live demos, group and 1:1 training, SOPs, check-ins, escalation, retention, adoption tracking
Implementation & ops	SaaS configuration, data migration and cleanup, integrations, rollout management, process design, ClickUp, Asana, Google Workspace, Microsoft 365
Compliance & privacy	TCPA and Do Not Call, consent and opt-out handling, Florida disclosure requirements, logged compliance review
AI & automation	Claude, Claude API, ChatGPT, Python, SQL, Supabase, Zapier, Lovable, browser automation, prompt design
CRM & marketing	KW Command, HubSpot, Follow Up Boss, Meta Business Suite, Google Ads, Eventbrite, Canva, Stripe

EDUCATION

Florida State University Coursework toward B.S., Biochemistry 2018 – 2022