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Partner Success Engineer | AI-Native Customer Success, Solutions Engineering, Partner Enablement

Summary

AI-native partner and customer success leader with 10+ years of experience spanning Solutions Engineering, Product, Customer Success, partner enablement, and contact center operations across regulated B2B technology environments. Proven track record guiding discovery, demos, onboarding, enablement, executive business reviews, technical workshops, renewal strategy, and cross-functional issue resolution while translating complex technical capabilities into measurable business outcomes. Hands-on builder of practical AI systems, agents, dashboards, and workflow automations that reduce recurring work, improve decision quality, and create scalable leverage across operations, partner success, and customer-facing execution.

Core Capabilities

- Partner Success and Lifecycle Management
- Solutions Engineering and Technical Discovery
- Customer Onboarding, Enablement, and Adoption
- Executive Business Reviews and Strategic Workshops
- Cross-Sell, Upsell, and Expansion Strategy
- API-Oriented Technical Conversations and Workflow Design
- AI Workflow Automation and Agent Design
- Product Demos, Technical Workshops, and Value Realization
- Partner Ecosystems, Channel Models, and Multi-Party GTM
- Escalation Management and Cross-Functional Resolution
- KPI Dashboards, Operating Cadence, and Insight Reporting
- Contact Center Operations, Coaching, and Frontline Enablement

Selected AI Builds

Slack-Based Personal Operations Assistant

- Built a personal assistant using Claude Code with a Slack bot frontend connected to Notion project databases and a farm SQL backend to surface insights, generate recommendations, and create structured records across systems.
- Designed event-driven n8n workflows that send Slack notifications when the daily summary email is delivered, at 1 p.m. with the next 24 hours of deliverables, and 30 minutes before meetings with prep context pulled from Notion notes, project documentation, and Superhuman email history.
- Added a self-hosted dashboard workflow that recommends tasks and triggers contextual Slack notifications with rationale when accepted, turning AI recommendations into trackable action.

Telegram Operations Bot

- Built a Telegram bot for Schuelace Farms that queries Notion databases for growth metrics, sales metrics, upcoming tasks, and time-allocation insights through a conversational interface.
- Extended the bot to write new tasks to Notion, update SQL records for seed lot numbers, and support workflows for adding new product varieties to Shopify.
- Reduced manual lookup and lightweight operational coordination by creating a natural-language layer across farm systems.

Voice-Enabled Farm Operations App

- Built a farm operations app with dictation-based input for harvest weights, planting dates, and packaging details by variety, size, and market.
- Designed the workflow to generate packaged-versus-sold reporting without manual tracking and improve visibility into inventory movement and market performance.
- Automated weekly email summaries with sales insights, operational schedules, and AI-assisted social media recommendations and content planning.

Professional Experience

**Visory (formerly Swizznet) — Senior Director, Solutions Engineering /
Solution Consulting | Remote**

Jan 2025 – Mar 2026

- Built and led a 5-person Solutions Engineering function, transforming a post-sales consulting team into a scalable pre-sales and customer-facing solutions organization.
- Standardized discovery, demo, qualification, and technical validation frameworks, improving qualification consistency and increasing win rates by 30%.
- Ran discovery workshops, executive sessions, and customer-facing enablement conversations that translated cloud, security, compliance, and AI-related concepts into practical business outcomes.
- Formalized operating cadence for Solutions Engineering, including KPI dashboards, performance reviews, and executive-level reporting aligned to revenue predictability and margin protection.
- Led cross-functional orchestration across Sales, Product, Legal, and Delivery for complex enterprise agreements, aligning commercial structure with delivery feasibility and lifecycle profitability.
- Designed AI-readiness and Microsoft 365 Copilot adoption frameworks for regulated enterprise clients, including approved use cases, governance guardrails, and structured user enablement.
- Represented the business in webinars, conference sessions, and partner/customer enablement programs focused on compliance, cloud transformation, and Microsoft ecosystem capabilities.

Visory (formerly Swizznet) — Director, Product & Solutioning | Remote

2023 – 2025

- Led cross-functional alignment across Product, Sales, Finance, Engineering, and Delivery to shape scalable offerings and improve execution discipline.
- Supported the company's largest enterprise opportunity, a \$4.2M ARR agreement serving 600+ downstream end customers.
- Built multi-year revenue and margin modeling frameworks to evaluate deal viability, lifecycle profitability, packaging decisions, and long-term expansion potential.
- Launched bundled offerings including SecureCompliance and SecureWorkplace in response to emerging regulatory demand, aligning product roadmap, pricing strategy, and operational capacity.

- Established a Technical Account Management function to formalize roadmap-driven success planning, renewals, and executive alignment.
- Facilitated executive workshops, partner-facing trainings, and customer education sessions on solution capabilities, best practices, and adoption.

Visory (formerly Swizznet) — Product Manager | Remote

2021 – 2023

- Led go-to-market strategy for managed services in regulated professional services verticals, aligning offerings to customer pain points, compliance requirements, and business outcomes.
- Developed repeatable solution frameworks and playbooks that reduced Solutions Engineer ramp time by 9 weeks and improved consistency in value articulation across a 12-person sales organization.
- Created repeatable vertical solution blueprints across accounting, construction, and wealth management to improve scalability, customer fit, and delivery consistency.
- Partnered with Sales and Marketing to deliver webinar content and enablement sessions that turned complex offerings into practical field tools.
- Served as technical and commercial lead on a \$4.2M ARR enterprise platform migration, coordinating internal and partner stakeholders to secure executive alignment and contract close.

Visory (formerly Swizznet) — Senior Manager, Sales & Client Success | Remote

2019 – 2021

- Built the Client Success function from the ground up, formalizing renewal governance, onboarding, expansion planning, and lifecycle engagement.
- Managed customer business reviews and renewal conversations to demonstrate value, surface new use cases, and strengthen retention.
- Redefined role boundaries across Sales, escalations, and billing to improve accountability, reduce churn, and strengthen customer ownership.
- Helped scale a partner-led motion in which approximately 60% of new deals were driven through partners, improving predictability for both direct and partner-sourced revenue.

- Structured channel partnerships and enablement approaches that improved renewal predictability and long-term value.

Visory (formerly Swizznet) — Inside Sales Account Manager | Remote

2016 – 2019

- Managed the full lifecycle from pipeline generation through discovery, solution positioning, onboarding, and customer coordination for SMB and mid-market accounts.
- Built early foundations in value-based selling, onboarding, customer advocacy, and translating technical capabilities into business outcomes for non-technical stakeholders.
- Conducted customer and partner training on services, onboarding processes, and escalation paths to support adoption and satisfaction.

Sykes Enterprises — Customer Care Supervisor | Remote

2014 – 2016

- Led high-volume contact center operations, improving service quality, coaching frontline staff, and maintaining performance in a fast-paced support environment.
- Introduced chat support, reducing average time to resolution by 25%.
- Delivered ongoing 1:1 coaching and group training to maintain consistency, product knowledge, and quality standards.

Aaron's Sales and Lease Services — General Manager | Various Locations

2006 – 2010

- Led sales, service, and delivery teams, improving execution, customer experience, and operational accountability.
- Increased location profitability by 28% in under one year through operational improvements, cost controls, and stronger team performance management.
- Facilitated team training on sales process, service quality, and operating standards.

Tools and Platforms

Claude Code, ChatGPT, Perplexity, Wispr Flow, Notion, Slack, n8n, Superhuman, SQL, Shopify, Microsoft 365, Copilot for Microsoft 365, HubSpot, Zendesk, ConnectWise, NetSuite, Google Workspace, Citrix Workspace, N-Central, Nerdio

Education

- Certificate in Product Strategy — Kellogg School of Management, Northwestern University
- Master of Business Administration — Louisiana State University Shreveport
- Bachelor of Arts — Florida Atlantic University