

# Jimmy McColery

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Customer Success · Customer Education · Instructional Design · Academic & Library Markets

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## PROFESSIONAL SUMMARY

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For 25 years I have helped academic and library customers turn complex software into something they actually use: first through technical support, then through content development and training, most recently through Customer Success Management. At Clarivate, that meant building real relationships with Tier 1 institutions, uncovering what they were trying to achieve, and staying with them through adoption and renewal. I tracked account health closely, escalated risk early, and partnered with Account Management to make sure nothing important fell through the cracks. Next: roles that combine deep product expertise with customer outcomes — customer success, customer education, instructional design, or program leadership in academic and library markets.

## PROFESSIONAL EXPERIENCE

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### Clarivate (Information Solutions & eBooks Team) | Customer Success Manager — April 2024 – April 2026

Team pivoted from Customer Education/Training to Customer Success Management in April 2024 | Territory: AR, IA, IN, KY, MN, MO, OK, WI | Manager: Heather Mitchell-Botts

**20+** Tier 1 Accounts · **8-State** Territory · **100%** Tier 1 Engagement · **92%** CSAT

- Owned 20+ Tier 1 academic and public library accounts across eight states, running a 6-step success plan lifecycle from onboarding through renewal.
- Achieved 100% Tier 1 customer engagement in 2024 through strategic AM partnership; built the foundation for a QBR practice that became a team-wide KPI in 2026.
- Developed an A-Z database list review process for identifying content visibility and adoption gaps; adopted as a standard consultation by Clarivate's Customer Success organization in 2025.
- Applied the Customer Predictability Index (CPI) framework, a company-wide 7-lens customer risk model, to score the full Tier 1 portfolio with evidence-backed justification; built a distributable team scorecard template for potential adoption across the CSM team. Used AI tooling in development.
- Tracked account health for 100% of Tier 1 customers, with 88% of records updated on a 90-day cycle; flagged and coordinated an AM-led churn intervention at the University of Kentucky before the situation escalated.
- Ran success plan kickoffs at Iowa State University, Washington University in St. Louis, Arkansas State Library, Northern Kentucky University, Carleton College, Mid-Continent Public Library, and University of Central Oklahoma.
- Led a 20-account territory realignment in January 2026: full handoff documentation, peer introduction calls, and account record updates, with zero customer relationship disruption; called out specifically by management.
- Built a 5-part advanced EndNote 21 webinar series in H1 2024 and trained colleagues to run it; the team-wide H2 rollout drove a 20%+ jump in public webinar attendance (108% of goal).
- Supported Tier 1 customer adoption of Clarivate's AI-powered research tools (EndNote Research Assistant, ProQuest Research Assistant, Ebook Central Research Assistant) for production academic deployments; produced EndNote 2025 launch content using ElevenLabs voice training indistinguishable from live delivery, saving hours of production time; recognized as one of the team's strongest AI adopters, with approaches taken up across the broader team.
- Served as Product Champion for both EndNote and RefWorks (2023–2026): named point of contact on the IS & eBooks CSM team for training materials accuracy, LibGuide maintenance, SME coordination, go-to-market readiness, and Product Management liaison.
- Developed a self-service on-demand learning plan for EndNote 2025 following the April 2025 launch: 8 original presentation decks (3-part essentials + 5-part advanced series) rebuilt from scratch to reflect the new product version, deployed on the EndNote LibGuide for global end-users.

### Clarivate (Customer Education Training Team) | Customer Education Trainer — May 2023 – April 2024

*Global customer-facing training delivery for academic and public library accounts | Manager: Heather Mitchell-Botts*

**97.7% CSat · 95.5% RepSat · 35 Training Sessions · 88 Survey Responses**

- Hosted 13 public webinars and 22 private training sessions in 2023 for customers across multiple regions, finishing the year at 97.7% CSat and 95.5% RepSat from 88 survey responses.
- Rebuilt essential-level EndNote 21 training as a 3-part series (30 min each) any trainer on the global team could pick up and run without additional support.
- Rebuilt the EndNote LibGuide on the ProQuest platform following the Clarivate-ProQuest merger, applying the organization's product template and style guide; it became the second-most-used resource on the platform.

**Clarivate (Digital Education Team) | Customer Education Content Developer — July 2018 – May 2023**

*Digital Education Team | Managers: Denise Jenkinson (2018–2019), Victoria Napolitano (2019–2023)*

- Owned the instructional content for the full EndNote product suite (EndNote 20/21, EndNote Online, EndNote Click, iPad/iPhone app) over 5 years, applying the ADDIE model across the full content lifecycle.
- Delivered Technology Showcase presentations at the Medical Library Association's annual conference in Chicago (2019) and New Orleans (2022), representing Clarivate on retraction alerts, Web of Science integration, and new product features.
- Co-presented with DistillerSR at MLA 2021 Virtual on complementary EndNote/DistillerSR workflows for systematic literature reviews; the joint session preceded a formal Clarivate/Evidence Partners channel partnership announcement.
- Supported high-stakes VIP pre-sales by joining Sales on approximately a dozen live customer calls across the late Technical Support and CECD periods, delivering custom EndNote demos and fielding complex technical questions in real time.
- Designed and administered a tiered (crawl/walk/run) EndNote product certification program for the U.S. Global Business Center sales team: created 30+ scenario-based customer qualification questions and a 22-slide curated demo deck; served as primary SME and assessor for the first live certification.
- Independently designed and launched Clarivate's paid private EndNote training program: four standard lesson plans (\$500/session, 25-attendee limit) plus custom options, reviewed by management and approved as a revenue-generating product and a strategic tool for monetizing lower-spend customer requests.

**Clarivate Analytics | Technical Support Representative — November 2016 – July 2018**

*San Francisco, CA*

- Primary escalation contact for EndNote, EndNote Online, and Reference Manager through the Thomson Reuters–Clarivate transition.
- Traveled to Clarivate's Centers of Excellence in Hyderabad and Chennai (July–August 2018) to transfer EndNote institutional knowledge to the incoming India-based support team.

**Thomson Reuters / ISI ResearchSoft | Technical Support Representative — August 2001 – November 2016**

*Berkeley, CA (2001–2004); San Francisco, CA (2004–2016)*

- Primary escalation contact for EndNote, EndNote Online, and Reference Manager across email, live chat, and phone; Tier II support for global EndNote distributors across international markets.
- Built and maintained the internal and client-facing knowledge base; wrote, reviewed, and rewrote user manuals and training docs through multiple product generations.
- Ran the EndNote community forum and handled technical escalations via the social media team on Facebook and Twitter.

**ISI ResearchSoft | Customer Support Representative — July 2000 – August 2001**

*Berkeley, CA*

- At 19, selected to travel to ISI's Philadelphia headquarters to train the parent company's customer service team on EndNote order entry and support systems; promoted to Technical Support Representative upon return.

**CORE COMPETENCIES & SKILLS**

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**Customer Success:** Success plan lifecycle, account health tracking, churn and risk management, renewal coordination, onboarding, product adoption, Tier 1 portfolio strategy, renewal predictability

**Relationship Management:** Multi-stakeholder engagement, AM/sales partnership, executive communication, cross-functional escalation, territory management

**Training & Content:** Webinar design and facilitation, blended learning delivery, instructional design, eLearning development, curriculum development, LMS administration, onboarding program design

**Tools & Platforms:** ProQuest platform suite, Salesforce (iQuest), LibGuides, Docebo, Articulate 360, SCORM, Camtasia, Vidyard, Lucidchart, Jira, WordPress, Microsoft 365/Copilot

**AI Tools & Workflows:** Daily productivity (Claude, ChatGPT, Copilot, Perplexity, Grok); content production (ElevenLabs voice training); local inference (GPT4ALL on NVIDIA RTX 3090, with working knowledge of quantization, VRAM tuning, and latency tradeoffs); RAG workflows (GPT-4o-mini, via Clarivate ProQuest Research Assistant)

**Industries Served:** Academic libraries, public libraries, research institutions, higher education (R1 through community college)

## EDUCATION

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Peralta Community College District | Computer Science

## CERTIFICATIONS

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Certified Customer Success Manager (CCSM) Level 1 | SuccessCOACHING