

MARTIN ORTIZ

Turning complexity into clarity for clients, teams, and organizations.

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I've spent my career at the intersection of technology and people. From building broadband networks for a thousand schools to guiding enterprise clients through high-stakes onboarding, I help teams deliver outcomes that last. My focus has always been simple: listen first, act with clarity, and achieve results that strengthen both systems and relationships.

SKILLS & EXPERTISE

- **Customer Success:** Onboarding, playbook creation, adoption strategy, ROI delivery, escalations management
 - **Technical Leadership:** Cloud & SaaS deployments, IT operations, telecom networks, monitoring systems, physical plant builds
 - **Program Management:** Multi-year roadmaps, vendor negotiations, compliance, risk management
 - **Data & Insights:** Analytics-driven decision-making, SLA monitoring, support case trend analysis, reporting
 - **Relationship Building:** Executive communication, trust-building, cross-functional collaboration
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PORTFOLIO / CASE STUDIES

[Optimizing Third Party Partnership & Support](#)

Challenge: A critical technology partnership was strained by misaligned priorities and slow support escalations. This created frustration for clients, put account retention at risk, and added unnecessary pressure on internal teams.

Action: I stepped in as the bridge between our organization, the technology partner, and our clients. I established direct communication with partner support and product teams, aligned SLAs with client expectations, and implemented a structured escalation process. I also translated client needs into actionable requirements the partner could address, ensuring both sides had clarity and accountability.

Outcome: Support resolution times improved significantly, reducing downtime and escalations. The strengthened vendor relationship gave us greater influence on product roadmaps and faster responsiveness on critical cases. Clients experienced smoother resolutions and increased confidence in our ability to manage complex technology partnerships effectively.

[Building a Web Tool for Special Education Services Reporting](#)

Challenge: Staff were relying on manual, error-prone processes to record and transfer data for special education services. The lack of a centralized system created inefficiencies, delayed submissions to contractors, and risked compliance issues that directly impacted reimbursement of state funds.

Action: Designed and implemented a web-based application using PHP, MySQL, and JavaScript. The tool provided a secure, user-friendly interface for staff to input service data, automated the transfer of information to contractors, and standardized reporting for submission to the state.

Outcome: The new system streamlined data entry and submission, reduced administrative overhead, and ensured timely, accurate reporting. Schools improved compliance and gained faster, more reliable reimbursement of funds, while staff had a simpler, more efficient workflow.

Optimizing Intelligent Virtual Assistant (IVA) Migration

Challenge: Clients using a legacy virtual assistant platform faced significant hurdles migrating to its updated version. Outdated scripts, limited documentation, and unclear compatibility guidelines introduced risks of service disruptions and delayed adoption. Many were concerned about platform stability and the effort required to transition, putting renewals and satisfaction at risk.

Action: I led the design of a structured migration strategy aimed at minimizing disruption. This involved mapping legacy functionality to updated equivalents, developing comprehensive migration playbooks, and identifying automation opportunities to streamline script conversion. I collaborated closely with product, support, and customer success teams to produce clear documentation, FAQs, and escalation protocols. I also partnered directly with clients to pilot migrations and incorporated their feedback to refine the process.

Outcome: Migration timelines were shortened, and adoption of the new platform accelerated. The standardized playbook instilled confidence across internal teams and clients, reducing support case volume and improving transition workflows. Clients gained quicker access to enhanced features with minimal disruption, reinforcing trust in the platform as a reliable and strategic solution.

Stabilizing a Strategic Software Partnership through Onsite Engagement

Challenge: A major enterprise client was experiencing recurring, unresolved issues with a critical software platform, leading to diminished confidence in both system stability and long-term roadmap viability. Concerns included unexpected problems introduced by updates, lack of transparency around future development, and slow or ineffective support responses. The strained relationship threatened long-term trust and renewal prospects.

Action: I organized and led a three-day onsite engagement that brought together the client's business and technical stakeholders with the software provider's support, product, and executive teams. This forum enabled direct dialogue between the client and decision-makers, ensured that technical issues were escalated to the appropriate engineering teams, and clarified ownership of roadmap commitments. I facilitated structured sessions that connected customer pain points to product strategy, resulting in actionable follow-ups and clear accountability.

Outcome: The engagement realigned the partnership and restored trust. The client received direct answers from senior leadership, faster resolution paths for critical issues, and improved visibility into the product roadmap. The software provider enhanced its responsiveness, while our team was recognized as a key facilitator in driving resolution and ensuring customer priorities were addressed.