

Preston D. Lau

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EXPERIENCE

Qualtrics

Provo, UT

Account Executive, Financial Services & Insurance

August 2026 – Present

- Carry a \$500K annual quota across banks, credit unions, and insurers under \$2B in annual revenue, spanning net-new acquisition and installed-base expansion.

Senior Customer Success Manager

January 2025 – August 2026

- Founded the **AI Center of Excellence** within GTM; built an AI-powered expansion opportunity builder on agentic frameworks, adopted by **3K+ employees** across all of Services and saving **~5 hours/user/week** across the suite.
- Manage a **\$13M book of business** with **100% retention** and **\$1.1M in expansion** revenue; earned **Exceeds Expectations (5/5)** performance rating.
- Led full-cycle technical implementations for 10 Fortune 200 companies including Fidelity/USAA, reducing customer **churn by 10%** and increasing **CLTV by 15%**.

Senior Technical Account Manager

May 2024 – January 2025

- Led a TAM team covering Qualtrics' **top 1% of clients (\$10M+ ARR)**, driving **150% YoY growth** in expansion and renewals across a financial services and insurance portfolio.

Technical Account Manager, Financial Services & Insurance

April 2022 – May 2024

- Managed a \$6.1M book of business, achieving 120% YoY growth through strategic renewals/expansions.
- Drove \$2M+ in consumption-based cloud revenue for a newly established support team within the first year.

Enterprise Support Specialist

June 2021 – April 2022

- Achieved a 4.8 CSAT and first call resolution of 91%, resulting in being the top 1% of support specialists.

PROJECTS & LEADERSHIP

Vett – AI Legal Conflict Checking

January 2026 – June 2026

Solo Founder

- Designed and architected a RAG-based conflict-checking system with ABA-compliant audit trail generation, integrated as a compliance layer on top of legal practice management software.

PAL Capital

May 2024 – Present

Owner

- Co-own and manage a residential rental property with 100% occupancy since launch, overseeing tenant relations, accounting, and long-term asset strategy.

Rotary International

June 2021 – Present

Provo Chapter

- Led community service initiatives including food drives for underserved families and food bank campaigns resulting in +1M pounds of food delivered.

Full-Time Missionary Service

January 2018 – December 2019

The Church of Jesus Christ of Latter-Day Saints — Hermosillo, Mexico

- Directed and mentored 160 missionaries in leadership, communication, and problem-solving across an assigned region.

EDUCATION

Brigham Young University, Provo

December 2022

B.S. Political Science (emphasis in International Strategy & Diplomacy), Minor in Business

Leadership: Management Consulting Association

SKILLS

AI/Technical: Claude API • RAG architecture • Vector databases • Agentic frameworks • Python • Java/Typescript • Github • FastAPI

GTM Stack: Salesforce • Gainsight • Tableau • Qualtrics • SQL • Redshift • AWS

Certificates: Eagle Scout • Rotary International Award • Spanish Fluency (CEFR C2)