



KELLY MORGAN

Captain
DISC Type : DS

Chief Customer Officer at KnowBe4
Tampa, Florida, United States

Overview

Kelly is a customer-obsessed growth leader with over 20 years of experience scaling global post-sales organizations. As Chief Customer Officer at KnowBe4, he focuses on transforming customer success into an engine for retention and profitability by embedding AI-driven insights. He holds a Bachelor of Science from the University of Florida.

At DocuSign, he led a global team of over 1, 600 people, overseeing a book of business valued at more than \$3 billion.

Personality Overview

Output-Driven **Consummate Professional** **Planner & Achiever**

Reading between the lines and seeing beyond your words comes naturally to them. They exhibit a rare combination of being result-oriented but patient at the same time. They might take some time to make their mind up but once they do, they don't change it easily.

Topics They Care About

- AI Risk Management**
His current role at KnowBe4 centers on helping customers mitigate human and AI-driven risks, a key focus in recent company announcements.
- Customer Lifecycle Value**
He is focused on delivering a seamless, outcomes-driven customer experience to drive retention and long-term value, as stated upon his hiring at KnowBe4.
- Scaling Global Teams**
He has a proven track record of building and leading large, high-performing global teams, including a 1, 600-person organization at DocuSign.
- SaaS Growth**


He founded a boutique consultancy for SaaS companies and serves as an advisory board member for a council focused on growing XaaS revenue.

Florida Gators

[Predicted] He attended the University of Florida, suggesting a likely affinity for their athletic teams.




Media Appearances


KnowBe4 Appoints Kelly Morgan as Chief Customer Officer.
Featured in KnowBe4 Press Release


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Article


Kelly Morgan joins KnowBe4 as Chief Customer Officer.
Featured in MSP Channel


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Article


Kelly Morgan, Chief Customer Officer at KnowBe4. Featured in KnowBe4 (Leadership page)


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Article


KnowBe4 Appoints Kelly Morgan as Chief Customer Officer.
Featured in Cadillac News


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Article


KnowBe4 appoints Kelly Morgan as Chief Customer Officer.
Featured in ITBrief.news

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Article


KnowBe4 appoints Kelly Morgan to lead global customer experience. Featured in ITPro

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Article

Work History

- 2-2026
Chief Customer Officer at KnowBe4
- 2-2024
Advisory Board Member - CRO Council at TSIA

Education

- Bachelor of Science (B.S.) from University of Florida

- 1-2022
Board Advisor at EyeLevel.ai
- 2022 - 2026
Chief Customer Officer at Docusign
- 2022 - 2025
Advisory Board Member at EyeLevel.ai

More Information

Social Presence :



Prographics :

Exp : **31** Location : **Tampa, Florida, United States** Job Level : **Leadership** Designation : **Chief Customer Officer at KnowBe4**

Insights For Selling To Kelly

👉 During A Call Or A Meeting

DO's

- Come across as a trustworthy professional and be respectful, they usually know their game
- Stick to your standard pitch and qualifying script, don't try to wing it
- You can spend time on BANT (or other qualification methodology) but keep it to the point

DONT's

- Don't shy away from asking hard questions, but be extra polite
- Don't take their patience for granted, avoid long-winding sermons
- Don't go over them unless you are left with no other option

👉 When Cold Calling

Insights

Pattern Interrupt: Confident style, with a mix of informality and formality gets their attention.

Pace: Speak slightly fast. Sound like a 'gets shit done' person.

Tone: Do not sound too eager, as if you have met a friend suddenly after a long time. Keep the tone calm but confident.

Tactics To Win: Strong words, focus on results, respectful confidence

Mistakes To Avoid: Apologizing, nervousness, information overload, social proof

Making The Ask: Confidently, ask for 10-15 minutes. Allude to the results and outcomes that are possible. They care about the ends more than the means.

Subconscious Driver: Results and outcomes are what matter to them. Any credible shot at getting results will appeal to them quickly.

Script

Greeting: Kelly, this is [user_fname] at [user_companynamewordstwowords].

Opener: In 30 seconds if I could share how 100% of your sellers could kick ass this year, can I go for it?

Introduction: We have built an AI that predicts exactly what would matter to your buyer before you even meet them.

Ask: Can I put 15 minutes on your calendar to show you how this changes outcomes for you?

Close: [time1] on [date1] sounds good? Or would you prefer [time2] on [date2]? And [prospect_email] works well?

👉 When Writing An Email

Subject: To the point, formal

Example: Personalized sales funnel', 'Sales conversion' etc.

Salutation: No

Example: Skip 'Hi', 'Hey' etc., use only the first name

Greeting: No

Example: Skip lines like 'I hope you are doing well'

Emojis/GIFs:

Bullet Points: Could use

Closing Line: Formally state your ask

Example: Something like 'If you are available tomorrow, shall we discuss this?'

Complimentary Close: None or standard

Example: Something simple like 'Thanks', 'Regards', or nothing at all.

Tone of Words: Confident with a formal touch

Overall Messaging: Focused on output

Length of Mail: Short

Example: Maximum upto 100-120 words

👉 While Negotiating & Closing

The secret to closing fast with Kelly is

- *Strong proof of impact and their conviction will matter the most, but they wouldn't want to act unilaterally either*

Will you ever get a clear answer from Kelly

- *They will say no if they are not convinced but you will have to prompt them.*

Insights For Deal Planning

How Fast (Or Slow) Will Kelly Move?

- *They will want to understand things well but can move fast once they have a clear picture.*

Can Kelly Take Some Risk Or Not?

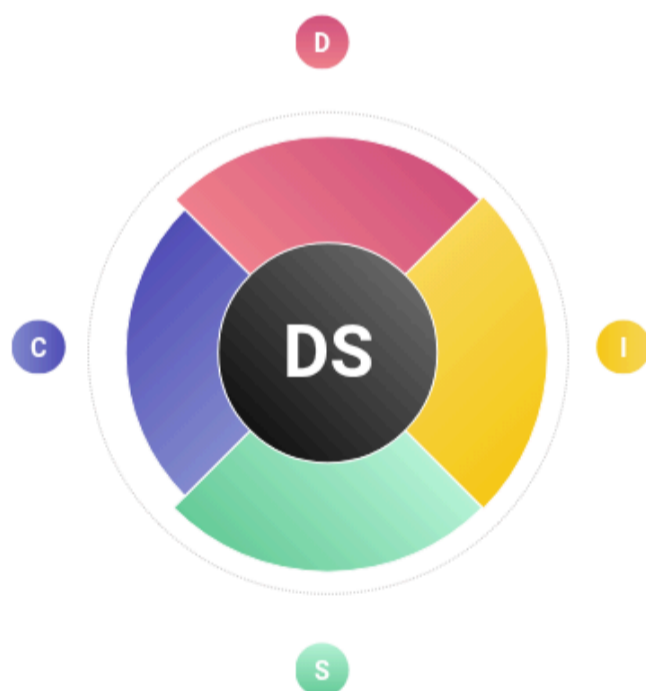
- *They have good risk tolerance but are likely to think it through once or twice.*

You And Kelly

Personality Compatibility

Not enough data to show compatibility comparison

DISC Profile : Kelly's Key Traits



DOMINANCE

Dominance(D) reflects how goal and task oriented a person is and her ability to accomplish results, irrespective of how demanding the circumstances might be. Those scoring high tend to be motivated by winning, competition and success and can be described as direct, demanding and strong willed.

STEADINESS

Steadiness(S) reflects the degree to which a person is likely to focus on cooperation, support and taking everyone along. Those scoring high tend to be consistent and calm, are excited about the opportunity to collaborate and partner and could sometimes be indecisive or overly accommodating.