

Client Success Manager

Client Facing Product Strategist and Support Manager

Description:

The Client Success Manager (CSM) is responsible for helping clients get the biggest possible benefit from using Leads360 software. The major aspects of a client's lifecycle are; on-boarding, including system configuration, integrations, training, on-going support and strategy consultation. The CSM works directly with the client through each of these milestones to ensure the highest levels of satisfaction and success. Additionally, The CSM must utilize all available people and resources within the company to help solve any client issues and perfect the use of the system.

Responsibilities:

The Client Success Manager is responsible for on boarding, system configuration, training and the on-going support of Leads360 clients. Every open task related to a client is owned to completion, along with all client communication regarding the tasks, by the CSM.

Specific duties include:

Strategy

- Discuss best practices with the client and explore the pros and cons of potential configuration strategies
- Work with clients to ensure they are leveraging the solution and achieving success and engaging fee-based resources as necessary
- Disseminate application and vertical best practices
- Serve as a CRM coach and trusted advisor to large and strategic Leads360 customers
- Advocate customer's priorities internally within Leads360
- Proactively identify and implement application solutions and enhancements
- Share best practices with team members to enhance the quality and efficiency of customer support and contribute to the knowledge base
- Serve as a Subject Matter Expert, in specific functional and technical areas

Training

- Teach new administrators how to configure the Lead Manager
- Help clients understand and use reporting features
- Host training seminars for all users of the system
- Engage with customer business stakeholders and users to drive client success and optimization or the application use

Task Management

- Identify and schedule deliverables, milestones, and required tasks for all aspects of client on-boarding and other custom work
- Coordinate with client to keep them up to date on the progress and status of all projects
- Provide prompt and complete resolutions to technical challenges that have been escalated
- Troubleshoot technical issues
- Lead the resolution of account issues, internally at Leads360
- Provide timely account status reporting both to clients and management
- Answer customer's questions and successfully negotiate issues

Top 5 Goals:

- Teach clients to build the system to match their business processes
- Resolve client issues in a complete, timely and professional manner
- Drive client retention through the highest level of system adoption
- Increase revenue per current client
- Exceptional client satisfaction

Required Skills/Experience:

- Complete understanding of the Leads360 products
- Customer focused
- Strong presentation skills
- Excellent verbal and written communication skills
- Technical support experience a plus
- High energy, passion, and creativity
- Highly organized
- B.S. or B.A. College Degree or MBA

This role reports to: SVP, Client Services

Key Performance Indicators (KPI)

1. Client satisfaction
2. System knowledge
3. Revenue growth per account
4. Retention rate