EXECVISION

Job Profile – Senior Client Success Manager (Senior CSM)

Role Definition

Manage relationships with clients, including strategic clients and partners within ExecVision's demand generation team. Serve as the primary contact and advocate for clients that are assigned to you. Work with clients on a regular basis to make sure meeting goals are met, clients are satisfied and long term relationships are established.

Job Responsibilities

- Complete a client / client success project each a quarter (4 per year).
- Assist with training new Client Success Managers.
- Lead kickoff calls and on-boarding of new clients, new sales representatives.
- Work with BDA's and Team Managers on client messaging and white papers.
- Identify and communicate client changes.
- Keep up-to-date with industry best practices.
- Develop and drive proactive account plans for clients.
- Be able to communicate ExecVision history, process and value.
- Utilize a consultative approach in assessing accounts and be able to recommend best practices or ways to optimize our services.
- Be an internal champion that handles client issues and escalates them as needed.
- Maintain accurate notes, contact information, documents, revenue amounts, etc in SF.
- Assist with upsell / cross sell opportunities and other revenue generating activities.
- Have fun, learn something new every day, love what you do.

Reports To

Director, Client Success

Measures of Success

Strategic Account Support
Be a Client Champion
Effectively On-boarding New Clients
Identify and Timely Communication of Client Changes
Accurate Client Data and Documentation in Salesforce
High Client Satisfaction
Create and Implement New Ideas and Processes
Participate in Weekly / Monthly Resources Meetings and Allocation
Assist Team Managers with BDA Professional Development and Career Paths
Help Define ExecVision Growth Strategy

Recommended Allocation of Time

Clients – 50%

1. Schedule and lead kickoff calls, complete new client on-boarding spreadsheet
2. Schedule and lead weekly client calls (run / review weekly reports / metrics)
3. Communicate with main point(s) of contact and decision maker(s) on a regular basis
4. Proactively review metrics with BDA's, Managers and clients to ensure requirements and measures of success are being met
5. Check in with calling team as needed to re-establish right account, contact, and message at
6. Work with BDA's, Managers and other colleagues as needed to resolve client questions, comments, issues
7. Manage internal and external account and territory requirements

8. On-board new client reps using white paper and ExecVision Best Practices and Working Guidelines
9. Work with BDA’s Execute talking points sessions with BDAs new to your accounts
10. Participate in coaching BDA’s, AM’s and CDA’s a few hours per week to assist with their training, development and client knowledge.

Identification and Timely Communication of Client Changes – 25%
1. Decision makers, main points of contacts, sales reps, etc.
2. Company news or M&A activity.
3. New products / services, initiatives, messaging.
4. Reporting, metrics, meetings, industries, titles, roles / responsibilities, etc

Salesforce – 25%
1. Update Account, Opportunity, Client Success and Billing Information.
2. Work with SF Administrator to make sure Client and requirements are set-up accordingly.
3. Review and provide feedback on Meeting Announcements, 3x3 Research, Call Notes, and Client Rep Feedback.
4. Ensure Client White Paper, Chatter Group, Weekly Client Report are completed and updated as needed.
5. Track Client Metrics and Results to make sure we’re meeting requirements in the Statement of Work and Measures of Success.

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