Client Success Manager Job Description and Comp Plan

The Client Success Manager's job is to profitably retain and grow the book of business value with existing clients by creating value while delivering exemplary Client Experience with Integrity

Tasks and Responsibilities:

- Discover and document (2) NEW POWER Goal per client per year in the Salesforce CRM
- Once a Month Client Activities:
  1) Analyze that data for each of your clients
  2) Deliver the insights to each of your clients
  3) Schedule a follow up call for each of your clients and find out where else we can help
- Every year each client MUST show enough POWER GOAL ATTAINMENT to exceed the investment of the agreement.
- Develop cross-selling / upselling opportunities for Sales (36/yr.)
  - Inform Sales of potential opportunities (per quota)
- Capture referrals from our raving fan clients (5/yr.)
- Solicit feedback from each client quarterly, and after key interactions and deliverables
- Up to 30% Travel
- Celebrate our clients' successes with them- Remind them of where we have attributed to the success of their measurable goals
- Invest in the relationship by showing sincerity with every interaction
- Follow best practices and proven processes for consistent, repeatable results
- Provide a weekly workplan to your manager
- Input all notes and activities into Salesforce-DAILY-This is a REQUIREMENT
- Log time spent with clients (timesheets) DAILY-THIS IS A REQUIREMENT
- Organize and manage client engagements, tracking tasks and deliverables to completion
- Attend meetings (internal and external) on time and with full attention. These are not to be scheduled over unless it is necessary
- Come to meetings prepared to contribute and participate
- Connect clients to each other, to Client Savvy specialists, and to partners when appropriate
- Seek to become an expert on CX (reading, research, conversations, networking, etc.)
- Provide Monthly status updates on all clients & projects This should also be updated in Salesforce. *(provide weekly update on client deliverables for that week)*
- Introduce clients to the range of Client Savvy capabilities and services
- Respond to clients promptly, same business day.
- Share Client Savvy content to clients and social networks
- Client Pulse in Salesforce
- ALWAYS Keep Outlook schedule current

Support the Client Savvy Team:

- Contribute to the Client Success Knowledgebase *(Most should be populated in HelpScout)*
    1. Processes that are not documented, and could be documented for support and training, MUST be documented.
- Contribute to our Client Experience efforts, be proactive in identifying and reporting ways for our team to improve
- Develop helpful content once a month based on discovered insights *(or pass along to appropriate person)*
- Seek efficiencies in everyday interactions while maintaining process and quality control
- Provide insights from clients to improve usability of the Client Feedback tool. Document in Slack Product Dev. group
- Actively seek out internal expertise and knowledge sharing from colleagues
- Apply our core values with intention daily
- Participate in Client Savvy strategic efforts
- Remain a source of consistent and positive outlook for our team and our clients

Support the Growth of CX as a Common Business Practice:

- Invite all clients to join our CX communities (CXps, Masterminds, etc.)
- Increase awareness of what others are doing

Compensation Plan:

The purpose of this plan is to create the optimum environment, processes, and metrics for achieving success and retention.

Plan elements include changes to staffing levels, roles, physical and logical organization, metrics, accountability, compensation and goals.

Base Salary: $40-50k
Base Commission (2.5% of any new opportunity that is closed with you as the "Lead Source")
Base Commission (5% of any retained business) based on renewal on assigned accounts only
$1500 Bonus when 36 opportunities (Quota) with you as the Lead Source
5% Bonus for every dollar in Reduced Churn at the end of each year
$50 spiff for every (4) processes documented, which have not been previously documented

<u>End of Year Bonus Qualifications:</u>
Must produce (1) case study from a client each year
EVERY client must have an approved power goal documented by the CSM

<u>President Club Qualification:</u>
If 100% of ASSIGNED Clients are retained
If 100% of assigned clients Validate that 100% R.O.I has been attained
If $125,000 of closed business with you as the Lead Source is attained