



Job Title: Senior Customer Success Manager
Department: Marketing, Sales & Account Management
Supervisor: Management
Location: Remote Position

Key Responsibilities:

- **Client Advocacy:** Problem solve client request and needs, engaging Account Manager as relevant. Recognize, document and alert leadership of trends in customer inquiries. Management of escalations and timely follow-up to any customer inquiry that is not immediately resolved. Is a subject matter expert (SME) in company products and able to provide direct support to both client care and sales team members. Manage and ensure appropriate documentation of cases into the client relations management (CRM) software. Understanding AccuSource goals and standards in customer support and ensuring each is met with the overall goal of customer retention and growth. Strategic advisor to clients and identify resolutions and solutions to their critical business initiatives, engaging Account Manager as relevant. Develop partnerships with customers to align their needs with our abilities; position AccuSource to be a partner and not just a vendor.
- **Client Training and Ongoing Solutions Support:** Educate and/or train clients and/or employees on the Instascreen platform and its functionality. Provide support to marketing in creating client specific training resources as needed. Other system and/or technology platform training support may also be required. Support of direct client and staff engagement may be requested to develop understanding and enthusiasm regarding AccuSource's solutions, with the goal of supporting continuous improvement and fostering client program optimization.
- **Organizational Support:** Identify opportunities for system/process improvements to provider greater efficiencies and/or decreased client turnaround time. Support sales and marketing in their efforts, which include but are not limited to, requests for proposals (RFP's), presentations, webinars and business reviews by providing technical expertise. Escalate client concerns to Leadership when resolution at the department level is not feasible, the issue presents risk to the ongoing business relationship, or the issue(s) require senior management engagement. Partner with Leadership to streamline and standardize processes, create metrics and tolls to monitor and measure success, and identify opportunities for development and growth.
- **Implementation:** New account set up and maintenance; duties to include but not limited to adding accounts, updating accounts, adding users or inactivating users, adding products/packages and inactivating products/packages. Ensuring changes are noted in the CRM. Engage as the primary Project Manager for implementations (large scale, enterprise and complex accounts) and for HCM/ATS integrations from inception through development and production, up to formal transition to the Dedicated Account Manager. Develop formal written project plans and detail client processing and functionality needs. Oversee and lead meetings and calls with clients, vendors, technology partners and AccuSource managers and staff to direct projects, document evolving needs and project progress, solicit resource collaboration and resolve problems. Coordinate directly with Implementation/Integration Solutions Engineer and, other relevant Operations staff in promoting and facilitating successful implementation and integration projects while promoting positive client experiences.
- **Team Management and Development:** Oversee Client Relations staff to ensure they are meeting/exceeding all established objectives; providing direction and supervision. Manage hiring, training, coaching and staff evaluations. Develop, implement and continuously improve standard processes, procedures and workflows.
- **Additional Duties:** Additional duties or project management support may be requested and/or assigned as needed to support overall organizational growth and development needs.
- **Travel Needs:** Some travel may be required for either client solution or new account implementation functions.

Qualifications/Requirements:

- Minimum of 5-year customer service experience (ideal experience working with all levels of customers)



- Background screening, drug screening experience and occupational health screening knowledge in a CRA environment preferred.
- Bachelor's degree or relevant professional work experience preferred.
- Advanced Microsoft Word, Excel, Outlook and PowerPoint skills required.
- Excellent verbal and written communications
- Critical thinking and data analysis skills
- Ability to multi-task and manage a variety of deadlines
- High focus on attention to detail
- Must be organized and adept at management
- Attentive and patient to customer needs, able to remain calm during stressful situations
- Live and remote, internal and external presentation skills
- Positive, cooperative work attitude and team player

Benefits:

- Positive, team-focused, energetic, growth minded company culture.
- Medical, dental and life insurance – company contributed
- 401(k) Plan
- Paid holidays, paid sick time and paid time off (PTO)