



JOB DESCRIPTION

Job Title: Client Success Advocate (CSA)
Location: Region or home office
FLSA Status: Exempt
Adopt, Extend Renew

Reports to: Client Success Manager (CSM)
Job Grade: TBD

Summary job description

Achieve client adoption of solutions through execution of Client Success Plans, considering a success plan complete only once either 1) pre-determined client outcomes have been attained or 2) in the event the success plan involves renewal of annual support or subscription, renewal is achieved. Direct the efforts of Technology and Operations Advocates to achieve the outcomes defined in the Client Success Plan. Focus on client outcomes, satisfaction and selectively use strategies to build installed base, adoption, and loyalty. Escalate and oversee timely resolution of issues.

While working to achieve client success, the CSA is to identify leads for extension/expansion. These are to be handed off to Business Development or Account Managers as inquiries to determine if they may represent qualified opportunities. Where necessary, support the pursuit process with information needed to close the business.

Goal is to achieve client engagement and outcomes, extend opportunities and expand business by listening for and escalating opportunities. Must be conversant with entire portfolio, SME in some advanced products, and expert in core solutions.

Essential job functions

- **Primary Responsibility:** Drive adoption through Success Plans (Current planning is that the CSA will execute approximately 2/3 of the client interactions, with 1/3 executed by other success team members).
 - Prior to close of sale or completion of project ACCEPT OWNERSHIP of INTERNAL PROJECT (Success plan)
 - Review pursuit documentation and suggested success plan
 - Attend turnover to client or kickoff process.
 - Post close of sale or project completion OWN INTERNAL PROJECT (Success Plan)
 - Configure and execute Client Success Plan.
 - Lead onboarding of Client Success Plan with client.
 - Lead actions and as needed engage a team of Operations and Technology Advocates to drive client outcomes and satisfaction by:
 - Evangelizing capabilities of solutions, including encouragement of clients to implement and use best practices.
 - Managing escalations between Technical Support, Consulting/Professional Services, Engineering/Development, Sales, Client organizations and other internal and external cross functional entities



- Proactively identifying opportunities to improve the client’s business.
 - Identifying risks to the client in achieving their stated business goals and developing a risk mitigation plan.
 - Securing client references and testimonials. Creating raving fans by capturing and reporting the transformations achieved
 - Setting up peer to peer networking opportunities and helping to broaden client community engagement.
 - Configuring and executing “playbooks” that are triggered by exceptions (positive or negative) to the success plan.
 - Support internal renewals process check points with data and updates.
 - Facilitate client expectations of renewals process.
- Secondary Responsibility: Extend and Expand leads/opportunities and renewals through support of opportunities.
 - Proactively identify and qualify leads (people, roles, objectives, timing) that will convert to extensions and expansions into other offerings. Provide insights into strategies the AM or BD may take on.
 - Support AM or BD with information as needed to advance opportunity closure.
- Handshakes:
 - Receive handovers from Pursuit Teams or Delivery Teams. Preconfigure Client Success Plans.
 - Participate in Sales to Delivery handovers when appropriate. AWARENESS.
 - Provide handoff to Account Management when success plan is complete. TRANSFER OWNERSHIP



Minimum job requirements

- **Education:** An undergraduate degree in engineering, computer science, communications technology, or equivalent experience
- **Experience:** Previous experience with InSource portfolio or similar product set
- **Specific Skills:**
 - Strong interpersonal skills but not a people pleaser
 - Motivated by the client's success from a business and technical perspective "How do I get the client to get the most out of what they have?"
 - Willing to identify, assess, scope and handoff opportunities/issues quickly and follow up
 - Organized and highly accountable (follows up to make sure it's done)
 - Strong on-the-field quarterback that listens to coaching
 - Comfortable seeking the diplomatic resolution and maneuvering to get the right person to say yes/no when needed
 - High technical knowledge of core/basic product sets
 - Superior teamwork ability
- **Specialized knowledge, licenses, etc.:**

Work Conditions: General office or home office environment and client manufacturing site visits. May require standing, walking, climbing stairs, light lifting, sitting, etc. Some elevated noise levels exposure. Minimal overnight travel required.