**Position Description:**  
The Client Success Account Manager II (CSAM II) is responsible for developing client relationships that promote retention and loyalty. This position takes a proactive approach to ensure the client is realizing value from the DataServ solution through solution adoption, expansion of services and making sure the client is satisfied.

This position reports to the Director, Client Success.

**RESPONSIBILITIES:**

Essential Functions

* Delivers and communicates ROI to our clients throughout the client lifecycle.
* Acts as the trusted partner for the client, advises them on business process improvement and best practices.  Must be comfortable sharing industry knowledge, references and client stories.
* Collaborates with the Client and Product team on use-cases and product functionality.
* Plans and executes Executive Business Review.
* Develops and maintains accurate client contact records in company CRM, making sure required mailing lists are current.
* Delivers training to new clients and existing clients as needed.
* Assists in developing topics and maintaining the DataServ Resource Center.
* Creates and delivers web-based surveys to assigned clients as needed, analyzing results and reporting them to the CRM.
* Through client relationship building, identifies opportunities for additional product and/or service sales to clients and reports those opportunities to the CRM for follow-up.
* Discovers, pursues and closes Upsell, Cross-Sell and Referral opportunities within the client base.
* Drives comprehensive Account Planning and collaborates with Sales to support larger sales opportunities within assigned accounts
* Proactively researches training content and delivery topics to provide ongoing improvements to DataServ training efforts.

Competencies

* Communication
* Teamwork
* Trust / Ethical Practice
* Cultural Awareness / Values
* Relationship Management
* Consultation

**WORK ENVIRONMENT**

This job operates in a professional office environment. This role routinely uses standard office equipment such as computers, printers, telephones, photocopiers, and filing cabinets. As a Software-as-a-Service (SaaS) company, employee must be technically savvy with the ability to use the computer/keyboard to conduct business.

**PHYSICAL DEMANDS**

The physical demands described here are representative of those that must be met by an employee to successfully perform the essential functions of this job.

While performing the duties of this job, the employee is occasionally required to stand; walk; sit; use hands to finger, handle, or feel objects, tools or controls; reach with hands and arms; talk or hear. The employee must occasionally lift or move office products and supplies up to 20 pounds.

**POSITION TYPE/EXPECTED HOURS OF WORK**

This is a full-time, exempt position with days of work Monday through Friday and with hours scheduled around core hours of operation. Occasional evening and weekend work may be required as job duties demand.

**TRAVEL**

Approximately 15-20% of travel is expected for this position.

**REQUIRED EDUCATION/EXPERIENCE**

* BA/BS degree preferred or equivalent 1 to 3 years’ work experience in industry, client/customer service or technical help desk.
* Account management, cross-selling and client development skills which include industry/process knowledge about the industries we serve as well as assigned clients.
* Excellent internal and external verbal, written and listening communication skills.
* Ability to work independently yet support team responsibilities.
* A positive, friendly, can-do attitude.

**PREFERRED EDUCATION/EXPERIENCE**

* Experience working with external clients preferred.

**ADDITIONAL QUALIFICATIONS**

* Proven analytical thinking and problem-solving skills
* Ability and desire to thrive in a team-oriented, fast-paced environment

**AAP/EEO STATEMENT**

DataServ is an Equal Opportunity Employer/Vet/Disabled.

I have received a copy of this job description and reviewed the responsibilities of this position. I understand that if I have any questions about the duties or responsibilities of this position, I will speak to my Manager or Supervisor. Signing below constitutes my understanding of the requirements, essential functions and duties of the position.

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Employee Signature Date

**Please Note:** This job description is not designed to cover or contain a comprehensive listing of activities, duties or responsibilities that are required of the employee for this job. Duties, responsibilities and activities may change at any time with or without notice.