**Position Description:**  
The Director, Client Success is a critical leadership role responsible for satisfaction, retention, engagement and expansion of all clients throughout the client lifecycle. This team is responsible for all aspects of the client relationship after the sale in completed – from initialization to user testing, training, go live, rollout and a client lifetime of support, upgrades, cross-selling opportunities, renewals and membership in the DataServ community. This position is accountable for managing client experiences and ensuring that value is received.

The Client Success Team that reports to this position includes the Client Success Account Managers, Solutions Consultants, Initialization Success Managers and Client Relationship Manager (Client Support). This position reports to the Co-Founder & CEO, CRO.

**RESPONSIBILITIES:**

Essential Functions

* Drives client loyalty and ensures that clients are not just satisfied, but promoters of DataServ solutions, and are realizing measurable value from our software and services.
* Coordinates full client lifecycle from post-sale through the entire contract period, including renewals.
* Oversees client programs, processes and best practices including the initialization process and best practices for optimizing the software and service.
* Responsible for client user adoption and acceptance of the software and services such that it is utilized to meet and exceed the client’s objectives.
* Oversees delivery of all initialization services for new clients, as well as training and support for established clients through various means including proactive calls and annual client success meetings.
* Collects client feedback via interviews, focus groups, surveys and other means.
* Identifies and communicates the key components of client success cross-functionally to inform product development, sales and marketing.
* Works cross-functionally to build and maintain a user/prospect Community that serves as a central point to exchange information about product and support, promotes client engagement, and provides value-added resources.
* Identifies opportunities for cross-selling new services to current clients as a revenue contributor, to foster additional value and reduce the churn rate. Forwards those opportunities to the Sales Manager for follow-up.
* Oversees the renewal of contracts for all accounts.
* Provides the team with a client success dashboard summarizing the overall health of the client base.

Competencies

* Communication
* Technical Expertise / Knowledge
* Teamwork / Leadership
* Problem Solving / Results
* 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 25% of travel is expected for this position.

**REQUIRED EDUCATION/EXPERIENCE**

* Bachelor’s degree required.
* Five to ten years’ experience in roles requiring cross-departmental oversight, building and mentoring to develop a team of excellence and managing by influence.
* Client-centric perspective.
* Good listening and problem-solving skills.
* Courage to stand up for your beliefs and convictions.
* Interpersonal effectiveness to communicate the facts, positive or negative, externally to clients and internally to executives.
* Experience working with external clients, preferably in a consulting environment. Must demonstrate the soft skills necessary to manage external client relationships.
* Technical analytical skills are required.
* Experience with time budgeting, forecasting, resource utilization.
* Experience with process development, improvement and analysis.
* Ability to set and maintain standards of professionalism and teamwork.
* Strong PC literacy.

**PREFERRED EDUCATION/EXPERIENCE**

* Advanced degree preferred.

**ADDITIONAL QUALIFICATIONS**

* Proven analytical thinking and problem-solving skills
* Must exhibit strong written, verbal and listening communication 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.