



<b>Title</b>	<b>Client Success Manager</b>
<b>Department</b>	<b>Sales</b>
<b>Reports to</b>	<b>Vice President Client Success</b>

### **Advocate**

Since 2001, Advocate, the Cloud and Connectivity Insiders, have helped more than 600 global enterprises transform and optimize their cloud and connectivity services, while achieving \$20 Billion in cumulative savings. As Cloud and Connectivity Insiders, we have more expertise and data to work with which is why we deliver an average of 25 percent savings and a 10-to-1 return on investment. Smarter - Together.

### **Client Success – When our Clients Succeed, We Succeed**

The key to Advocate Success is knowing our Clients - knowing what makes our clients succeed will positively impact every part of Advocate's business. All across the technology industry and well beyond, a new and vital role is being established and developed. This new role goes by many names: Customer Success Manager, Client Advocate, etc., but regardless of the label, it's about creating a center of excellence around the client experience that ensures client relationship growth and retention. The most effective way to keep and grow our company and our client base is to make our clients as successful as possible in using our professional and managed services.

Real Customer Success Management is a passion and comes from the heart. This emerging role is about a solution to the core issues of customer portfolio development, retention and expansion – A Great Client Experience.

### **Mission:**

The ultimate strategic goal of the Customer Success Team is sustainable corporate profitability and growth. Advocate's growth target is to achieve \$50M in revenue over the next 5 years. To achieve this goal, we must grow our strategic client base – 20 Strategic Accounts that each generate \$1.5M to \$2M in sustainable revenue.

The Client Success Manager key objectives and responsibilities include:

- Creating a Center of Excellence around the Client Experience.
- Ensuring Client Loyalty and Satisfaction.
- Revenue Retention and Growth



### **Key Roles and Responsibilities:**

- Own overall relationship with assigned clients to increase service adoption and ensure retention and satisfaction.
- Establish a trusted/strategic advisory relationship with each assigned client; drive and message continued value of Advocate's Services by collaborating and adhering to the client's timeline and key performance metrics that aid the client in achieving their goals.
- Work to identify and develop up sell opportunities.
- Own client communications and account escalations across Advocate portfolio by having strong working knowledge of all account activity and deliverables to further increase the quality of Advocate's service delivery.
- Develop, prepare and nurture client satisfaction and referral sponsorship.
- Establish a strategic account plan for Advocate business growth aligned with the client's success.
- Retention and Growth of Advocate Revenue with an introductory quota that is achievable with support and coaching.

### **Qualifications and Experience**

- 1+ years of successful Advocate work experience or 3 – 5 years of successful account management and selling experience in a technical consulting and/or services environment with IT, finance, and procurement executives as the key contacts.
- Proven ability to drive continuous results / value that meet or exceed client expectations.
- Domain knowledge of or experience in selling or delivering IT Services Consulting and Lifecycle (governance, inventory and financial) Management to Mid - Large Global Enterprise Clients.
- Exposure leading to general knowledge of connectivity and infrastructure services technologies, providers, and industry trends to include network, mobile, cloud, data center, SaaS, IaaS, and unified communication services including the related assessment, planning, and procurement processes.
- Familiarity working with clients of all sizes, ability to effectively communicate and build deep and wide client relationships.
- Excellent communication and presentations skills.
- Excellent skills with Microsoft Outlook and the Office application suite (MS Word, Excel, PowerPoint).
- Minimum 4-year college degree.

### **Cultural Competencies**

- Passion for driving Client Success and ensuring an Excellent Client Experience.
- High standards for personal and client deliverables.
- Self-starter with strong team communications and leadership skills.



- Commitment to drive, support, and enable the delivery teams as needed to achieve client value in all deliverables, QBRs, and communications.
- Eager to learn, adapt and perfect your work.
- Be aware that there is support for your success and you have the ability to put it to good use.

### **Outcomes:**

The expected outcomes against which this role is measured:

- Client Relationship and Communications Plan
- Extend current relationships deep and wide within the assigned client organizations and increase client sponsorship.
- Owns client relationship and executive messaging; driving the value message by relating it directly to the client's goals and needs, and what Advocate has accomplished.
- Ensure that Advocate is meeting and exceeding project goals and objectives per the Statement of Work.
- Assist as needed in client issues resolution.
- QA Service Delivery / Client Deliverables.
- Enforces The Advocate Way.
- Interact in a systematic manner with clients and the decision maker for all assigned Strategic accounts.
- The position may require up to 25% travel as we value in person presence and communications.
- Ensure monthly touch points for all assigned Maintenance accounts.
- Client Satisfaction
- Accountable for client experience and satisfaction.
- Owns responsibility for assigned clients survey and NPS Scores.
- Position Advocate services and value for renewals, revenue retention and growth.
- Establish C Level referral pool / Ask for the Lead.
- Account Planning
- Develop, maintain and execute strategic account plans in pursuit of mission.
- Acquire and maintain knowledge of assigned client's Environment and Industry.
- Know and Maintain Positioning Matrix.
- Keep up-to-date with E-Suite / Leadership changes and determine how best to engage with all client relationships.
- Know Client Vendors – Cloud, Connectivity, Managed Services, Consulting Services.
- Maintain Client Journey Slide.
- Revenue Retention and Growth
- Produce effective client proposals consistent with the standards of a professional organization.
- Target 100% Retention of recurring revenue.
- Responsible for contract renewals – LCS and Brokerage.
- Increase existing recurring revenue both Lifecycle and Brokerage services.



- Identify new Opportunities for Consulting Services within the assigned Accounts.
- Sell into Advocate “White Space” – vertically and horizontally through the Advocate Service Catalog.
- Achieve sales bookings goals to increase revenue year over year.
- Maintain current knowledge of the Advocate services and value proposition and the market and competitor landscape.
- Represent Advocate in the market with integrity and our core values.
- Provide accurate and timely account plans, sales process and forecasting information to management via SalesForce.com, email, phone, etc. as appropriate.\

#### **Position Incentive Package:**

- Base Salary
- Incentive Plan equal to 20% of Base Salary based on revenue retention, growth and client satisfaction.
- Sales Commissions paid on net new revenue growth<sup>1</sup>

#### **Opportunities**

- Join a company named to the **Inc. 5000** list of Fastest Growing Companies for **ten consecutive years**
- Named one of the Top 100 Workplaces by The Atlanta Journal-Constitution
- Work daily with Fortune 500 Clients
- Opportunity for rapid career advancement
- Client facing position with the opportunity to make a direct impact

#### **Rewards and Benefits**

- Competitive base pay
- Incentive bonus plan
- 3 weeks paid time off
- 2 paid days off for community service
- Comprehensive benefits package
- Medical/dental/vision benefits
- Company matched 401(k) with immediate vesting
- Flexible work arrangement to support a good work-life balance
- Professional development with a long-term career path
- Continuing education and training reimbursement
- Paid employee referral program
- Conveniently located near I-285, GA-400 and I-85; free parking

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<sup>1</sup> Sale Commissions to be governed by 2017 Client Success Manager Compensation Plan.



**Organization and position related competencies**

<b>Organization</b>	<b>Position Specific</b>
Customer Focus	Business Acumen
Partnering/Teamwork	Results Oriented
Integrity/Ethical Standards	Problem Solving
	Communication
	Relationship Building
	Systems Thinking

If you'd like to join the Advocate team, send your cover letter and resume for consideration to: [careers@advocateinsiders.com](mailto:careers@advocateinsiders.com).