

DATE: October 26, 2023
CLIENT: Afidence
TEAM: Growth Team

CLIENT SUCCESS MANAGER
(CSM)

CLIENT SUCCESS MANAGER (CSM)

SUMMARY

As a key role within the Afidence Growth Team, the Client Success Manager (CSM) is primarily responsible for managing and expanding our existing client relationships while supporting the development and growth of our consultants that serve those clients. The CSM also assists with consultant recruiting, trade shows/events, and other marketing activities. This role is a full-time, salaried position with commission plan. While much of the work can be conducted virtually, some key responsibilities require in-person presence at various sites in the greater Cincinnati/Dayton metro areas.

KEY RESPONSIBILITIES

- Manage the success of our client engagements by conducting ongoing meetings with the clients we serve. These meetings are intended to capture/exchange feedback between our clients and team, identify/understand client needs, and build/work action plans to address those needs while fostering continuous improvement of the services we provide.
- Assist Afidence leadership with advising/mentoring our consultants by conducting ongoing meetings with each consultant assigned to the clients we serve. These meetings are intended to facilitate feedback between the client, consultant, and team, while also providing a mechanism to coach/mentor each consultant.
- Expand existing client relationships by developing, executing, and tracking a Client Success and Expansion Program that supports the overall growth of Afidence. Examples of plan activities include:
 - Preparing, organizing, and conducting annual client briefings with existing client contacts.
 - Identifying and vetting new target contacts within existing client organizations.
 - Working with Afidence Business Development Managers (BDMs) to schedule and conduct meetings with new target contacts and managing any follow-up action items, such as the development/delivery of new proposals.
- Assist with the recruiting and interviewing of new potential Afidence consultants.
 - Participate in the interviewing process for active/open positions.
 - Proactively recruit/vet candidates for future hire via trade shows, LinkedIn Recruiting, etc.
- Assist with the planning and execution of trade shows and client/team events, as well as various marketing activity.
- Track all client, recruiting, and marketing activity in our CRM (HubSpot).
- Participate in various internal meeting, including weekly Growth Team meetings and monthly all-hands meetings.

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QUALIFICATIONS

Required

- Alignment to our core values (trustworthy, positive, accountable, problem solver, humble).
- Warm, welcoming, and engaging personality.
- Naturally curious with exceptional communication skills.
- Highly organized with great attention to detail and follow-through.
- Proven ability to influence others, build consensus, coach, and mentor.
- Adapts well to changes in situation or information.
- Experience in B2B sales and/or B2B account management.
- Broad understanding of enterprise technologies, including cybersecurity, cloud, infrastructure, and application development.
- Bachelor's degree (marketing, sales, business, and/or IT is preferred).
- Flexibility to work after-hours as needed, primarily for event participation.

Preferred

- Experience with developing presentations and/or infographics.
- Hands-on experience with:
 - Microsoft Office (Outlook, Word, PowerPoint, Excel).
 - Microsoft Teams and/or zoom.
 - Canva.
 - LinkedIn Recruiting.
 - CRM and/or marketing automation tools, such as HubSpot.