

## Job Description

### Customer Success Specialist / Manager (Australia)

#### About Performance Leader

Performance Leader is a B2B software and consulting firm that develops and implements performance and feedback software. Our customers are leading professional services firms, primarily in the law and accounting sectors.

We're a small and agile team of people who care about our clients, our community and each other. When you work at Performance Leader, you will feel this deep sense of care and commitment.

Headquartered in Melbourne, Australia, we also have team members in the UK. Our business is growing, and with this growth comes this new opportunity.

#### About the role

The Performance Leader Customer Success Manager (CSM) helps clients get the most from their engagement, while keeping Performance Leader focussed on delivering the best imaginable outcomes and experience for customers.

Our CSMs work with the HR teams and firm leaders. You will manage the client relationship – onboarding, training, support, strategic engagement and more.

The CX team is split across Australia and the UK. While your clients will be operating within Australian business hours, we have team and all hands meetings after hours to accommodate our colleagues in the UK. These will be no more than 3 hours a week.

Your line manager is based in Melbourne, Australia.

#### Responsibilities

Our CSMs manage:

- Client onboarding and platform configuration
- Client relationships, support and training
- Client business outcomes and solution adoption

CSMs are:

- **Collaborative:** we enjoy working closely with our colleagues and clients
- **Advocates:** we are partners in the success of our clients and seek to align client needs and product development direction.
- **Curious:** we are curious about our clients (and how we can help them achieve their people and culture goals) and about high performance firms generally.
- **Business savvy:** we help make high value decisions for the client and our organisation.

Specific responsibilities include:

### **1. Supporting our clients**

- Respond and resolve support requests (via our support platform, email, video conference or phone).
- Coach clients on how to use the platform (on calls or by creating resources). Clients are empowered to take ownership, but we adapt to client needs and capabilities.
- Manage client sites (for example making configuration changes or user updates).

### **2. Helping clients achieve their business goals**

- Build a trusted relationships with clients (for example through regular check-ins, being proactive and sharing best practice).
- Grow the value clients get from their software and service (by increasing adoption and improving outcomes).
- Support clients with culture change (for example through guidance, building capacity or insights from data).
- Participate and co-lead the Performance Leader Best Practice Groups and other community events.

### **3. Leading client onboarding**

- Manage the client onboarding project (tracking dates, scheduling events, coordinating resources).
- Build the client instance (configuring software, populating data).
- Lead success workshops and training (identifying goals, designing plans and developing capacity).

### **4. Helping our business grow**

- Co-design and build sales proposals and demo sites.
- Represent CX in sales conversations and pitches.
- Supporting the development of our product and service.
- Create additional value for the client (products or services).
- Gather feedback and build a referral network.

## **Experience**

- 3+ years in a professional services environment, in an HR or IT role, or in a software company with PSF clients
- Proven track record of working in a customer facing role (internal or external).

## Skills and behaviours

### Essential

- Self-motivated, enthusiastic and with a “can do” attitude. We’re a small team, and everyone needs to play their role for our overall success.
- Independent and proactive. You must be comfortable working in a remote-first environment. As some colleagues are in the UK, some aspects of the job may be asynchronous.
- Excellent communication and interpersonal skills. You will strong attention to detail, as our client-base requires clear and accurate communications.
- Tech-savvy. You should be capable and confident using and learning software applications and helping your clients to use software.

### Beneficial

- Project management skills
- Interest in people and culture, and performance and feedback

## Remuneration

Highly competitive remuneration will be offered, subject to candidate experience and capability. A bonus scheme will also apply.

## Flexibility

We work flexibly. This role is available as part-time (as few as 15-hours per week, scaling up, spread over 3-5 days) or full-time, with scope to adjust working hours.

We envisage you will work from home and make scheduled visits to client premises as required. If you are based in Melbourne, our preference is that you will work in the office one day per week.

MacBook and other accessories will be provided to support your flexible working.

## Location

This position is located in Australia. You must have full working rights in Australia to apply. Occasional travel within Australia and overseas may be required.

## Diversity & inclusion

Performance Leader values diversity and inclusion, as do our customers. We are an equal opportunity employer and do not tolerate discrimination or bias in any form.