

Job Title: Customer Success Manager
Function: Customer Success
Reports to: Director of Customer Success
Direct Reports: None
Job Location: Cleveland, Ohio

We are Proformex, a Cleveland-based software company that is transforming the life insurance industry. Our platform is reimagining how critical data is accessed, visualized, and acted on in the life insurance market. Proformex helps financial institutions, distributors, fiduciaries, and agents more easily monitor and manage policies, helping protect millions of policyowners and their beneficiaries. Our team is growing rapidly, and we're looking for a Customer Success Manager who will be responsible for working with cross-functional teams to deliver exceptional value to our Customers.

POSITION SUMMARY:

As a Customer Success Manager, you will assist Proformex customers in onboarding onto the platform and working closely with them to drive adoption of the product and demonstrate ongoing value. You will work together with our Operations Team to deliver that value to the customers throughout their lifecycle and help them in achieving their goals and desired outcomes. The primary objective of the CS team is to increase user engagement, renewal rates, minimize churn, and support revenue growth through customer advocacy and referrals.

RESPONSIBILITIES:

- Work closely with our customers to drive engagement, develop usage behaviors, and maximize the value they get from Proformex
- Serve as primary contact for onboarding of new customers & training of platform end users
- Maintain a cadence of communicating with customers about their adoption, usage trends, and sentiment, while continuously seeking opportunities to encourage customer engagement
- Gauge customers' level of engagement with the product and provide feedback to the Product and Development teams for improvements
- Proactively, capture, communicate, and address customer concerns and risks
- Identify opportunities for customers to act as Proformex advocates

REQUIREMENTS:

- 1-2 years previous experience in customer success or account management roles within a SaaS software company
- Proven track record of working in a customer facing role
- Ability to work on projects given a specific timeline and milestones
- Impressive attention to detail and follow through on tasks both to customers and internally
- Superior professional communication skills and business acumen
- Ability to interact with B2B customer in an encouraging and professional manner
- Experience in working with cross-functional team (e.g. Sales, Product, Marketing, Operations)
- Able to work comfortably with an evolving and fast paced environment

The package will include salary and health benefits. Come join us as we revolutionize insurance technology and take a key role in growing our company.