



Change GPS Pty Ltd

Date of last amendment: 16/05/2022

Member Success Manager -

The Member Success Manager will be responsible for managing and growing a portfolio of new ChangeGPS members. They will be responsible for establishing, maintaining and developing the relationship for all clients in their portfolio. They will provide ongoing support throughout the client's period of service to demonstrate value, as to ensure that we optimise their likelihood of them maintaining our services and identify any opportunity to up sell additional products and services where applicable. They display an aptitude to learn new software apps and updates and to communicate those clearly to our clients. They are proactive and collaboratively involved in resolving technical accounting scenarios and service ticket requirements that require a high level of accounting knowledge.

Performance indicators

S.no	Performance indicator	Measurement of performance indicator	Assessment period
1	Activity Management	Maintain 100% accuracy when managing activities. Items such as, but not limited to, calendar invites, meetings, events, and CRM should have 100% accuracy and should be in line with company standards	3 months
2	Call Cycle Management	Maintain call cycle and meeting cycle with current customers to follow up with. Call cycle for all contacts maintained in Company CRM	3 months
3	Mid-Level Customer Support	Work closely with Product Manager and Head of Operations to action and resolve technical accounting scenarios and service ticket requests.	3 months
4	Conduct the necessary retention activities	Must reach the required retention rates or the quarterly revenue target. Identify new sales opportunities within existing accounts to up-selling and cross-selling	3 months
5	Manage and solve complaints or problems that arise from clients	Quickly and efficiently respond to client complaints or problems in a timely fashion	3 months

S.no	Performance indicator	Measurement of performance indicator	Assessment period
6	Project Management and coordination with sales team and other staff members	Clear and effective communication, conducted in a manner that enables the company to deliver its product/services to meet clients' expectations	6 months
7	Contribute initiatives to drive best practices within the organisation	Effectively contribute, where appropriate, to ideas or initiatives in order to increase the service and delivery to clients	6 months

Other roles and responsibilities

- Manage relationships within your portfolio of Members to drive revenue growth and generate new opportunities
- Proactively and collaboratively assist in resolving technical accounting scenarios and service ticket requirements with Product Manager
- Building accounts and driving member engagement by ensuring they are receiving value from our products/services
- Monitoring at-risk clients (low engagement, low usage) to prevent churn
- Proactively promoting product awareness and training needs of clients to ensure value is received
- Dealing with incoming queries, issues and the day to day needs of your clients as they arise
- Developing new contacts within existing clients to build awareness of our products/services
- Conducting regular follow up with clients to ensure that they are properly engaging with our products/services and identify further engagement opportunities through training or other
- Conducting regular user training and product awareness sessions
- Researching and understanding each client's business to identify new opportunities
- Respond to client questions, queries, or other from clients
- Conduct the necessary project management activities in order to ensure products/services are rolled out to a professional standard
- Continually learn new software apps and updates
- Communicate new product offerings to clients
- Identify upcoming opportunities to up-sell and cross-sell
- Liaise between sales team and other internal/external stakeholders
- Conduct business development activities as required. For example, attendance at webinars and events.

Previous experience

- Adequate knowledge and experience supporting management in a corporate environment in a client relationship / account management role
- Proficient in Microsoft Suite and cloud technology businesses
- A sound understanding of current trends and consumer requirements
- Ability to multi-task and work under pressure
- Persistent approach to time management
- Excellent interpersonal/telephone/online video meeting skills and intuition
- Aptitude to learn new software apps/updates and to communicate those clearly to clients
- A systematic approach to account management processes with attention to detail

Education

- 3-5 years working as a Certified Practicing Accountant
- CPA or CA is highly regarded
- A Finance degree or degree in a related discipline