

## **Job Description – Customer Success Representative**

Customer Success Representatives are responsible for establishing and building customer relationships to promote customer retention and loyalty. You will ensure customers are satisfied with the ShareMy.Health products and services, provide customer service support and work to resolve any customer issues. This role acts as the primary point of contact for the company's customers and connect customers with specific teams to address specific requests.

As a Customer Success Representative, you will work with customers directly to manage client relationships, opportunities or issues. Position is virtual. Location near the Salt Lake City or New York City metro region would be preferred.

### **Duties and Responsibilities**

As a Customer Success Representative, you will help increase customer retention and identify opportunities for add-on sales. By establishing yourself as knowledgeable in the ShareMy.Health platform, you will be able to build and maintain customer relationships and improve the customer experience. Duties and responsibilities include:

- Research issues and provide Level 1 product and technical support
- Establish and maintain customer relationships with key customers
- Identify opportunities for add-on sales
- Participate in strategic account management planning
- Establish and improve customer success policies and processes
- Identify areas for improving the customer experience and internal processes
- Collaborate with product development teams
- Execute client training and special projects, as required

### **Skills and Qualifications**

As a successful Customer Success Representative, you will have impeccable customer service skills as well as strong written and verbal communication skills. As a CSR, you will have knowledge of the ShareMy.Health platform and be a credible authority in using the software. The ideal candidate should be proficient with using CRM (Salesforce or HubSpot), Excel, and PowerPoint presentation software. Additionally, a quality candidate will have the ability to quickly learn about our company's products and services to establish themselves as experts in the field. Key skills include:

- Impeccable customer services and communication skills
- Knowledge of best practices in customer service and retention
- Proficient with applicable software applications
- Strong written and verbal communication
- Strong aptitude for technical software products

**Education Requirements**

The candidate will have a four year college education, certification and training appropriate for sales, service or marketing, preferably with a technology or software company. Education and training in computer science, application development or a related discipline is a desired. Working knowledge of Microsoft Office, Google Docs and Gmail are required.

**Experience Requirements**

The candidate will have previous customer service experience, sales experience or experience working directly with customers. Prior experience working with or managing a customer success team or prior supervisory or leadership experience is may be desirable.