Client Success Manager - Services Dept

STATUS:	Exempt	**DEPARTMENT:**	Services Department
APPROVED BY:	CSO	**DATE:**	08/2020

Client Success Manager-Job Description

SentryHealth is searching for self-motivated, client-focused, and experience-minded Client Success Manager (CSM) to build and foster long-term, committed relationships. As a CSM, you will be an internal extension of the client's voice, championing our client-centric mentality across the organization. You will play an integral role in strengthening relationships by reinforcing our dedicated, knowledgeable, relevant, timely, and actionable way of doing everything. You will also work directly with cross-functional teams to ensure that clients are provided the support and data necessary to understand the tremendous benefit that our services provide. You will share facts and data that demonstrate the client-specific ROI and improvement in member engagement, health, and wellness. Furthermore, you will communicate additional gains that can be achieved and recommended methods to obtain those gains. You will be responsible for handling each assigned client relationship with a level of dedication that makes the client unable to imagine a future without SentryHealth and WellOnMyWay.

You will join a dynamic team that is passionate about our clients, our members, and our services. We are dedicated and driven by our mission to improve the physical, emotional, and financial health of those in our care. We do this by delivering innovative health and wellness solutions that drive higher levels of engagement and meaningful outcomes for our clients and our members.
Some travel will be required (travel will be determined by current health and safety standards).

SentryHealth

ORGANIZATIONAL RELATIONSHIPS

Reports to:
CSO

Supervises:
None

CLIENT SUCCESS MANAGER RESPONSIBILITIES

Responsibilities of this role include, but are not limited to the following:

- Prepare materials and conduct review meetings with each client based on the client's preferred schedule, preferably monthly but no less than quarterly. Capture the voice of client and client specific outcomes/performance goals associated with utilizing WellOnMyWay.
- Build and maintain a strong relationship with each client by being a trusted subject matter expert for all post-implementation topics that arise.
- Communicate in a dependable, thorough manner via on-site visits, phone calls, and email.
- Own all client-specific cases, from creation through resolution, communicating with the client regularly during the resolution process.
- Understand and maintain strict compliance to HIPAA guidelines and respect member anonymity by not sharing member-specific details in any client level discussions.
- Communicate effectively with clients to identify needs and evaluate premium program offerings that will increase customer ROI through additional program commitments.
- Identify internal opportunities for improvement and make constructive suggestions for change.
- Document lessons learned and share those lessons with team members.
- Establish strong client relationships leading to perpetual annual renewals.
- Coordinate annual biometrics event for each client.
- Effectively communicate client updates to CSO and other SentryHealth executives, as necessary.
- Maintain regular communication with clients on updates, program progress, issues, and invoicing questions.
- Deliver engaging, informative, well-organized presentations.
- Demonstrate the ability to communicate difficult or sensitive information tactfully.
- Exhibit a client-centric approach and personal accountability for driving exceptional client experience survey results.
- Monitor client experience survey results and follow up immediately with a formal action-plan for scores within defined ranges.

REQUIRED QUALIFICATIONS:

- Friendly, relatable, genuine nature, with a sincere, direct, and trustworthy communication style.
- Extensive, successful experience managing client portfolios and leading client retention.
- Proficient in communicating with individuals at all levels of an organization, in both written and spoken form.
- Flexible with aptitude to easily adjust priorities based on client needs or time-sensitive business requirements.
- Ability to present the organization in a competent, compelling manner both internally and externally.
- Strong analytical skills to monitor, measure, and report on client performance by analyzing trends, gaps, and positive outcomes.
- Possess a high sense of personal motivation, with the ability to work independently and in collaboration with others in a fast-paced environment.
- Technically comfortable and quick at learning new, moderately complex systems.
- Proficient with Microsoft Office Products, particularly Word, Excel, and PowerPoint.
- Bachelor's Degree preferred.
- 10 years' experience in client services field preferred.
- 5 years in Client Success Management role required.

I understand that this job description in no way states or implies that these are the only duties to be performed in this position. I understand that I will be required to follow any other job-related instructions and to perform any other job-related duties as requested by my supervisor or any person authorized to give instructions or assignments. I understand the requirements listed in this document are the minimum levels of knowledge, skills, or abilities. I understand this document does not create an employment contract, implied or otherwise, other than an "at will" relationship.

Employee Name (printed): ______________________________

Employee Signature: ______________________ Date: __________

Manager Signature: ______________________ Date: __________