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Job Title: Client Success Manager  
Reports to: CEO

Targeted Annual Earnings: \$85,000-\$110,000/year  
20%+ of TAE from Bonus Programs

## Job Mission

The Client Success Manager (CSM) is responsible for managing clients and their business for maximum client success. CSM's meet with the owners and executives of our client companies on a regular basis. The meetings should be non-technical so that the client recognizes the value they receive and are eager to attend regularly. The meetings will include providing basic summaries of the services being performed, education and business process implementation surrounding our offerings, and future planning and budgeting discussions to ensure all clients adhere to our technology stack and minimum standards. Client retention and technology stack compliance across our client base are the primary metrics for this position.

## Expected Outcomes

- 1) Define what client success is for each client and create roadmaps and plans that achieve it.
- 2) Define the Strategic Business Review (SBR) schedule for each client and adhere to it.
- 3) Keep all clients compliant with our technology stack and minimum standards.
- 4) Achieve scorecard targets and continually improve client satisfaction, retention, and referrals.
- 5) Sell business technology and infrastructure refresh projects and achieve assigned quota each year.

## Who Do I Help?

### Colleagues:

- Help them understand client business issues so they can provide better service to clients.
- Help them understand how their day to day work positively (or can negatively) impact a client's business.
- Help them remain efficient by keeping clients compliant with our technology stack and minimum standards.
- Help the Network Admins by making sure items that are important to clients are routinely taken care of and that billing is carried out consistently without errors each month.
- Work with the Service Manager to adjust service department processes that help ensure client success.
- Work with the CTO to adjust professional services processes that help ensure client success.

### Manager:

- Help manager be successful by delivering on accountability items in your areas of responsibility and achieve or exceed the targets specified.

### Clients:

- Be a trusted advisor about all business IT needs.
- Help them improve their businesses: increase revenue, reduce costs, enable employees to be more efficient, gain or maintain competitive advantage, and reduce or mitigate risk.

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- Maintain a solid SBR agenda that entices clients to regularly attend meetings.
- Create strong stickiness with all accounts through consistent delivery.
- Create a strategy/roadmap and help them manage and predict IT costs necessary to keep their technology infrastructure at desired operational levels.
- Help them implement and utilize the products and services in our technology stack. Strong adherence to technology stack helps ensure success.
- Answer quick, high level questions regarding technology and business.
- Provide tips, general guidance, and basic training on their business technology.

#### Vendors:

- Create strong relationships.
- Continually improve knowledge of their products and services to sell more of their offerings.
- Attend panels, discussions, and conferences.
- Participate in research when engaged.

#### Duties and Responsibilities:

- As the leading member of our company's Client Success Team, the Client Success Manager will work with the team to develop a strategic plan for our technology stack that promotes revenue, profitability, and growth as an organization.
- Work a flexible schedule and be available as needed for clients.
- Escalate issues to the CEO as needed.
- Document internal processes and procedures related to duties and responsibilities.
- Responsible for entering time and expenses in the PSA tool as they occur.
- Enter work as charge codes, activities, or service tickets in the PSA tool.
- Understand processes in the PSA tool by completing assigned training materials.
- Attend staff meetings as required.



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### Knowledge, Skills, & Abilities Required

- Strategic – Set a vision for client technology and create a multi-year plan to achieve it.
- Presentation Skills – Good at organizing information in a clear, structured format and comfortable presenting it in front of others.
- Business Skills – Ability to understand business needs and how to apply technology to those needs.
- Lead and set a strong example for others.
- Honesty – Having integrity, being honest, and forthright is a “pay to play” value.
- Team Player – Humble, Hungry, People Smart; build and encourage teamwork.
- Attention to Detail – Doesn’t miss or overlook miniscule items.
- Accuracy – Good at data entry, having effective typing skills, and being correct and precise.
- Proactivity – Be forward-thinking, looking ahead, understanding how decisions impact the future.
- Aggressiveness – Determination, competitiveness, ambitious, resilient.
- Analytical Skills – Ability to collect and organize information and apply logical thought processes.
- Strong Customer Service Skills – Able to resolve problems quickly and in a friendly tone.
- Communication – Active listening, strong oral and writing capabilities, “people smart”.
- Efficiency – capable of producing desired results with little or no waste.
- Achievement – Attain all key performance indicators defined on the position scorecard.
  - Success: Earn bonuses for better than required performance, and sales commission for successful opportunities that you close.
  - Failure: 90-day performance improvement plan, followed by termination if not successful.
- Proficient with general business/office applications and IT industry software.
- Actively participates in company culture.

### Educational/Vocational/Previous Experience Recommendations:

- 3 years of related experience or equivalent combination of education and experience.
- Knowledge of Microsoft business productivity products: Windows, Office, Teams, etc. and more importantly, how they are used in a business to improve an organization’s capabilities.
- Experience as a systems engineer, helpdesk technician, project manager, or similar roles are preferred.
- B2B sales experience is preferred.

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Only local candidates need apply.

*The statements above are intended to describe the general nature and level of work being performed by people assigned to this job. Other duties may be assigned as needed.*

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