

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

We are Proformex, a Cleveland-based software company disrupting the life insurance and annuity industry. Our platform is reimagining how banks, broker-dealers, fiduciaries, and agents actively manage a multi-billion-dollar asset class while better protecting beneficiaries. We are looking for a Customer Success Manager to lead relationships with key strategic and enterprise accounts. This is a unique opportunity to play a critical role in our growth and expansion.

## **POSITION SUMMARY:**

As a Customer Success Manager, you will assist customers in onboarding onto the platform and responsible for monitoring and managing the health and success of Proformex subscribers. You will work together with our Sales and Operations Team to deliver that value to the customers throughout their lifecycle and help them in achieving their goals and desired outcomes. The CSM is responsible for driving growth and product adoption across the overall book of business, ensuring retention of existing business. The SMB Customer Success Manager will actively contact customers, identify situations that may put these clients at-risk while working to solve them, and serve as a direct contact for feedback to our leadership team on the needs of our customers as it affects our product roadmap.

## **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 and 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
- Focusing strongly on increasing Gross Revenue Retention across all customers
- Proactively, capture, communicate, and address customer concerns and risks
- Identify opportunities for customers to act as Proformex advocates

## **REQUIREMENTS:**

- 1-3 years of customer success experience
- 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 within the Life Insurance or Financial Wealth Management Industries an advantage
- 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.