

Position Title: Strategic Customer Account Manager
Reports to: Director, Customer Success
Direct Reports: N/A
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 Strategic Customer Account 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 DESCRIPTION:

This is a critical role that requires a technically minded, process-driven, and results-focused individual. The Strategic Customer Success Manager will manage the lifecycle of strategic Proformex customers, focused on everything from implementation to ongoing relationship management. They will be focused on product adoption, utilization, and satisfaction by key customers, building strategic plans based on customer goals, and identifying new business opportunities among existing customers.

POSITION RESPONSIBILITIES:

- Lead ongoing, strategic management of a portfolio of strategic customers, including running QBR's, monthly meetings, and stakeholder conversations
- Work with internal teams to ensure Proformex is delivering maximum value for our strategic customers to drive long term adoption, retention, and revenue growth
- Clearly communicate progress of monthly, quarterly, and annual initiatives to internal and external stakeholders
- Analyze data through reports and trends, leveraging insights to drive customer actions
- Taking a consultative approach to make sure that the customer is maximizing their usage of Proformex, and ensuring that they will renew their subscriptions year over year
- Serve as a primary contact for onboarding of new customers & training platform end users
- Communicating regularly with Sales on growth opportunities and increase customer Net Retention

REQUIREMENTS:

- 3-5 years in external, customer facing role (preference given to Customer Success)
- Excellent at articulating vision and planning execution of projects
- Demonstrated ability to successfully resolve situations that are broadly defined, complex, diverse, & occasionally unprecedented
- Superior communication skills to create and convey customer objectives, success strategies, and customer insights for internal and external stakeholders
- Excellent relationship management, interpersonal, influencing skills, and ability to work in a flexible and fast-moving environment with rapidly changing priorities
- Strong data and analytical expertise, whether it pertains to financials, KPIs, or operations
- Curious, proactive, client-centric mindset, demonstration of keen interest in acquiring new technical skills, and comfort with technical conversations
- Invested in our customers' success and outcomes obsessed
- BA/BS Degree required

The package will include salary, bonus, and health benefits. Come join us as we revolutionize insurance technology and take a key role in growing our company.