

## JOB DESCRIPTION

<b>Job Title:</b>	Customer Success Specialist
<b>Salary range/pay band:</b>	£30,000 base – £35,000 OTE
<b>Reports to:</b>	Customer Success Manager
<b>Hours:</b>	37.5 hours per week
<b>Location:</b>	Remote Working/Quarterly – Vantage House, Sheffield

### About us

Vantage was established in 1988 and quickly became a major provider of customisable data management solutions. We have over 30 years of experience helping organisations in various sectors, including charities, healthcare, local authorities, and many more.

We help organisations manage risk, execute audits, adhere to compliance regulations, record incidents, and respond to complaints. Our customers are saving time and valuable resources with the help of over 25 software modules, helping them achieve their goals and streamline their procedures.

### About the role

We are looking for a Customer Success Specialist to support our Customer Success Manager in building and maintaining strong relationships with our customers. This is an exciting opportunity for a motivated and customer-focused individual to play a key role in ensuring a seamless and positive experience for our clients.

The Customer Success Specialist will be responsible for ensuring ongoing customer satisfaction starting from the initial onboarding. This role is ideal for someone who is eager to learn, proactive, and passionate about customer satisfaction.

Working directly with clients, the Customer Success Specialist will address their needs, solve problems, and ensure a seamless experience throughout their journey with us. Collaboration with internal teams is essential to ensure customer questions and concerns are resolved in a timely manner.

### Work Relationships

- Reporting to the Customer Success Manager
- Engaging with key stakeholders within customer organisations

- Collaborating with the Implementation and Support teams to ensure customer needs are met.
- Supporting the wider customer success function in delivering excellent service

## Responsibilities

- **Client Relationship Building**
  - Build strong working relationships with key stakeholders at customer sites.
  - Provide first-line communication with customers via email, phone, and online meetings
  - Coordinate and schedule customer check-ins and feedback meetings
  - Ensure ongoing customer satisfaction through scheduled reviews, workshops, webinars, and other appropriate initiatives.
- **Onboarding and Training**
  - Assist in new customer onboarding, ensuring a smooth and positive experience.
  - Work with the Customer Success Manager to create and update training materials, including user guides, webinars, and video tutorials.
  - Help deliver basic training sessions to customers, ensuring they understand key software features.
- **Customer Adoption**
  - Assist customers in maximising the potential of our software for their benefit.
  - Ensure that customers are aware of available functionalities and are utilising them effectively.
  - Liaise with the Implementation Lead to schedule further training sessions for customers where necessary.
  - Assist in the successful adoption of Vantage Software post implementation.
- **Customer Support Assistance**
  - Monitor and log customer queries and issues, escalating as necessary to the Support or Implementation teams.
  - Track and follow up on support tickets to ensure customers receive timely responses.
  - Identify common customer pain points and contribute to solutions that enhance customer satisfaction.
- **Continuous Improvement & Customer Engagement**
  - Gather and report customer feedback to the Customer Success Manager, identifying trends and areas for improvement.
  - Assist in customer engagement initiatives, such as webinars, newsletters, and community forums.

- Support internal reporting by helping track key customer success metrics.

## Experience and skills

### Essential

- Strong communication skills and the ability to foster positive relationships with customers.
- A proactive and customer-centric mindset with a passion for delivering great service.
- Ability to work collaboratively with teams across the business.
- Organised and able to manage multiple tasks simultaneously.
- Technical competency with Microsoft tools such as Teams, Word, Excel, and PowerPoint.
- Willing to travel.

### Desirable

- Experience in a customer-facing role (e.g., customer service, account management, or sales support).
- Exposure to the software industry or SaaS-based products.
- Experience working in the healthcare and/or non-profit sector.

### Personality

- Confident - Able to communicate clearly and professionally with customers and colleagues.
- Self-Starter - Proactive, positive, and eager to take on responsibilities.
- Keen to learn - Open to feedback and willing to grow in the role
- Embodying Vantage values - “Accessible, Adaptable, Committed, Human and Trusted”