

OPPORTUNITY PROSPECTUS

Customer Success Manager



About Performance Leader

Performance Leader was founded in Australia in 2007 to introduce professional service firms to talent management software. At that time the technology available was not built for professional service firms and was too expensive or impossible to configure. Also, most software companies didn't have the patience or staying power to help firms implement, embed and evolve the technology. That's still the case.

So founders Ray D'Cruz and Patrick Fitzgerald created Performance Leader. They paired flexible technology with deep sector expertise. Since then they've been combining technology and consulting capability to help their clients successfully implement performance and feedback technology. They've built long-term relationships that have been the basis for constant evolution for their clients.

Performance Leader now works for many leading firms on challenging talent projects all over the world. They've built a great team, collaborated extensively with like-minded organisations, and opened offices in London, Perth and New York. Their products have continued to evolve to be more flexible and agile as work becomes more flexible and agile.

What hasn't changed is their exclusive focus on the professional services sector and a desire to build relationships that sustain change.





Q&A

with
Ray D'Cruz

Why is this an exciting time to join Performance Leader?

We have built a great base in the UK over the past five years. Our clients are premium professional firms, and many are advocates. Now is the time for you to join Performance Leader, to help us capitalise on those great beginnings and to share in that success. We have clear and ambitious goals, and the UK, as the world's most exciting market, is central to our vision. Your contribution to Performance Leader will be important and valued.

What do you envisage the day to day of this role will be?

The day-to-day role will be focused on deepening relationships with key clients through strategic and operational support and collaborating with a small and dynamic team of committed and caring colleagues. We are keen to play to your strengths too, working with you to identify your interests, talents and ambitions and align specific work projects.

What are the key attributes you look for when appointing people to your team?

Care: we care for our clients and for each other. We want to see both our clients and each other succeed. It influences how we work with each other and our clients. It means going the extra mile, pitching in, doing what we say we will do, and having attention to detail. These are the things that build relationships and trust.

Independence: this role is based in the UK, while most of our team is based in Australia. While there are a few hours overlap each day, and we make a real effort to be connected, the person who fills this role must enjoy and thrive working independently. That takes a certain maturity and mindset.



Customer Success Manager

The Performance Leader Customer Success Manager (CSM) will support customer success by helping clients get the most from their engagement, while keeping Performance Leader focussed on delivering the best imaginable outcomes and experience for customers. The role reports to Logan Balavijendran, Head of CX.

Purpose

The CSM will be involved in all aspects of support, account management, demonstrating the product, educating customers and more. As a b2b software company, primary customer contacts will be admin and super admin users.

CSMs are:

- **Collaborative:** we work with our teams and clients
- **Advocates:** we are partners in the success of our clients
- **Curious:** we are focused on the person and purpose, and always keep learning

Specific responsibilities include:

Supporting our clients

- Respond and resolve support requests (via our support platform, email, video conference or phone).
- Coach clients on how to use the platform (on calls or by creating resources). Clients are empowered to take ownership, but we adapt to client needs and capabilities.
- Manage client sites (for example making configuration changes or user updates).

Helping clients achieve their business goals

- Build a trusted relationships with clients (for example through regular check-ins, being proactive and sharing best practice).
- Grow the value clients get from their software and service (by increasing adoption and improving outcomes).
- Support clients with culture change (for example through guidance, building capacity or insights from data).
- Participate and co-lead the Performance Leader Best Practice Groups and other community events.

Leading client onboarding

- Manage the client onboarding project (tracking dates, scheduling events, coordinating resources).
- Build the client instance (configuring the software, populating data)
- Lead success workshops and training (identifying goals, designing plans and developing capacity)

Helping our organisation grow

- Co-design and build sales proposals and demo sites
 - Represent CX in sales conversations and pitches
 - Create additional value for the client (products or services)
 - Gather feedback and build a referral network
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Person specification

Being able to fulfil the Key Responsibilities in any position is achieved by having the necessary ability, skills, and experience.

Experience

- 3+ years in a professional services environment
- Proven track record of working in a customer facing role (internal or external).

Skills and behaviours

Essential

- Self-motivated, enthusiastic and with a “can do” attitude. There is an opportunity and obligation to lead.
- Independent and proactive. You must be comfortable working in a remote environment.
- Excellent communication and interpersonal skills. You will often communicate with clients about complex, time-sensitive matters.
- Tech-savvy learner. You should be capable and confident using and learning software applications.
- A high level of accuracy and attention to detail.

Beneficial

- Project management skills
 - Interest in People and Culture
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“Anyone coming from a bigger company will immediately see a greater transparency, more autonomy and have the opportunity to have a greater impact on the business.”

Logan Balavijendran, Head of CX



ABOUT THE OPPORTUNITY

Remuneration Highly competitive remuneration will be offered, subject to candidate experience and capability. A bonus scheme will also apply.

Flexibility We work flexibly. This role is available as part-time or full-time, with scope to adjust working hours to suit your needs.

We envisage you will work from home and make scheduled visits to client premises as required. MacBook and other accessories will be provided.

Location This position is located in the United Kingdom. As many of our clients are based in London, regular travel to London, and occasional travel within the United Kingdom and overseas may be required.

Diversity & inclusion Performance Leader values diversity and inclusion, as do our customers. We are an equal opportunity employer and do not tolerate discrimination or bias in any form.

“Our culture is open, honest, fair & personable. This role will have space to lead and be innovative and we have built out a sales and account management process in anticipation of hiring this person and for them to be successful.”

Paul Lemon, Director BD EMEA & ASIAPAC



How to apply

Performance Leader has recognised the strategic importance of this role to their business and have invested in a full candidate search campaign with Seldon Rosser.

To express your interest in this opportunity please contact graham@seldonrosser.com +44 7384 447 633

performanceleader.com seldonrosser.com

