

## **ROLE PROFILE**

<b>Title:</b>	<b>Manager, Client Success</b>
<b>Function:</b>	Client Success
<b>Reports To:</b>	Senior Director, Client Success
<b>Location:</b>	Toronto
<b>Type:</b>	Full-Time

## **Role Description**

The Manager, Client Success is responsible for the day-to-day account operations and oversight as well as project management for key clients. The Manager, Client Success has a deep understanding of their assigned clients' industry & key business objectives, and how Exchange Solutions' products & services can help them achieve these objectives. The Manager, Client Success is a strong communicator who works collaboratively to gain alignment and foster accountability and is a creative strategic thinker with deep business acumen and the resourcefulness to find a way to get things done. They must be able to act as both an advisor to the client and a project manager who can influence and negotiate internally and externally across various levels and functions. They must be able to deliver compelling propositions for both the client and Exchange Solutions that will ultimately achieve deliverables, produce results, and yield exceptional client relationships.

## **Primary Responsibilities**

- Develop and maintain strong client relationships and ensure high levels of client satisfaction across all assigned clients.
- Manage multiple and diverse client stakeholders across various Business Units and navigate through client competing priorities and organizational structure complexity.
- Balance client service excellence and efficiency of Exchange Solutions resources.
- Perform a variety of account operations tasks with openness and flexibility. These include such tasks as: internal resource management, client task prioritization & communication, project management, documentation & reporting, developing detailed business requirements, performing UAT / QA for items such as email campaigns, reports, promotions set-up, etc., issue resolution, ad hoc requests and troubleshooting, and meeting management.
- Contribute to the development of internal processes and 'best standards' for client service and delivery.

- Ensure client adherence to processes to streamline account operations and increase team productivity and efficiency.
- Collaborate on the design of strategy and solutions that improve client results and progress Exchange Solutions' in-market product offering.
- Working collaboratively with other members of the Client Success team, meet or exceed assigned client's revenue plan by securing and delivering statement of work projects.
- Expertly understand our technology and analytics capabilities and services provided by Exchange Solutions to assigned clients. Be a thought partner with technology and analytics teams to develop solutions, trouble shoot issues, proactively identify risks, and explore and advance opportunities to implement new solutions that support both client and Exchange Solutions' needs.

### **Capability Requirements – education, skills & experience**

- Post-secondary education, with a degree focused on either business or marketing.
- A minimum of 5 years related experience in loyalty, marketing, payments, or business analysis. Loyalty experience at a solutions provider or retailer is preferred.
- A minimum of 3-5 years program and project management/leadership experience leading teams to complete major projects, under deadlines, with minimum supervision. PMP designation an asset. Experience / knowledge of SAFe - Scaled Agile Framework for managing software development an asset.
- Possess a strong business acumen with proven experience in Account and project management.
- Excellent organization and time management skills, ability to multitask and manage multiple priorities at the same time.
- High comfort level with entrepreneurial, software development and technology outsourcing environments.
- Demonstrate the ability to identify opportunities to innovate and support continuous improvement.
- Understand technology / product (at a business level) and be able to explain features to clients.
- Ability to identify and manage client/product risks and mitigate.
- Strong with analytically driven problem-solving approaches.
- Superior communication skills both verbal and written, with excellent presentation skills.
- Excellent interpersonal skills and strong team building capability to cultivate and maintain effective working relationships, both internally and externally.
- Has a strong technical aptitude and ability to translate data into business intelligence.
- Proficient computer skills, including Microsoft Word, Excel, and PowerPoint.