

Client Success Specialist

About SafeSend

At SafeSend, we are automating the tax and accounting profession with innovative, emerging technologies. We help accounting firms and tax practitioners work more efficiently and better serve their clients. We are driven by our vision and are always on the lookout for talented, team-oriented people who want to help us continue to push forward. Join us and work in an exciting environment, with some of the brightest and most creative people in technology!

Opportunity Overview

As a **Client Success Specialist**, you play an integral role in helping to increase client satisfaction and brand loyalty for a fast-growing and award-winning software company. The Client Success Specialist implements the onboarding process, performs web-based software training and process consultation, and instruct clients on best practices to maximize the value of their software investment. The Client Success Specialist will work closely with internal teams to interpret client needs and help ensure products meet those needs. This position will also maintain on-going familiarity with standard concepts, practices, and procedures for serviced products. This role reports to the Director of Client Success.

Responsibilities

- Partner with accounting firm customers and assist with best practices and optimal usage of the SafeSend Returns product line.
- Build and foster on-going relationships with assigned firm customers and serve as a resource to the firm. Serve in an account manager role.
- Pursue driving higher usage and adoption of SafeSend Returns with assigned firms with the goal of driving greater overall customer satisfaction and better return on investment.
- Assist firms with the renewal process and purchasing needed quantities/licenses.
- Participate in and conduct technical software training for new and existing product users.
- Act as a subject matter expert on assigned products and answer customer and internal employee questions on implementation procedures.
- Develop a thorough working knowledge of the SafeSend suite of products.
- Assist in product launches.
- Understand how our customers are utilizing SafeSend products and recommend additional features that can be leveraged to enhance their business.
- Ensure client configuration aligns with recommended best practices.
- Work with marketing, sales, and product development to support the development of marketing initiatives that spotlight how SafeSend solutions exceed client expectations.
- Responsible for problem tracking, diagnosis, replicating business issues, troubleshooting, and resolution of client problems.
- Host trainings and/or demonstrations of product lines.
- Invest in ongoing self-development to acquire profession relevant skills necessary to satisfy customer needs.
- Be accountable to client retention and product usage growth targets for assigned firms.
- Identify at-risk firms and pull in other resources – support, training, etc. – as needed to preserve and grow the business we have with the firm.

- Collect and analyze customer satisfaction and technology census data by way of Post Tax Season Calls, surveys, and other customer interactions.
- Actively identify and implement ways to make it easier for our customers to do business with us.

Qualifications/Skills

- Bachelor's degree from an accredited college/university or equivalent work experience.
- 3+ years of experience in a public accounting firm, with a focus in firm administration or professional services; or previous front-line customer service experience in a software company.
- A passion for technology and comfortable with web-based applications.
- Exceptional time management skills and ability to prioritize multiple tasks in a fast-paced environment while meeting critical deadlines.
- Strong presentation skills and ability to effectively communicate a variety of topics to a diverse audience.
- Experience providing high-level client support, internally and externally, along with the ability to build strong relationships with clients and team members.
- Excellent verbal and written communication skills.
- Strong organizational skills and attention to detail.
- Possess the ability to self-motivate, maintain a consistent schedule, and a personality to train clients who may have no understanding of the product.
- Excellent computer skills including Microsoft Word, Excel, PowerPoint and Outlook.
- An ability to communicate with and influence decision makers and key firm staff.
- A positive/winning attitude, highly collaborative, cross-functional, and team-oriented.

Why join SafeSend?

We love serving our customers, making technology tools that help people, and being part of a vibrant organization that is team oriented. These characteristics are part of the reason our flagship solution, SafeSend Returns® is a multi-year technology innovation award winner. We deliver on our promise to offer best-in-class software design and customer service.

We offer a competitive compensation and benefits package including company-paid health benefits, company-matched 401 (k) plan and Section 125 plan. We provide an environment that encourages a healthy lifestyle promoting work/life balance and overall employee well-being. We also offer paid vacation time off, sick leave and holidays. Our new Ann Arbor office is where we plan to continue to grow and we are looking for new team members to contribute to our culture and makes us an even better organization.

For immediate consideration, submit your cover letter and resume to careers@safesend.com and reference **Client Success Specialist** in the subject line.

SafeSend is an EEO and Affirmative Action Employer of Females/Minorities/Veterans/Individuals with Disabilities. All employment decisions shall be made without regard to age, race, creed, color, religion, sex, national origin, ancestry, disability status, veteran status, sexual orientation, gender identity or expression, genetic information, marital status, citizenship status or any other basis as protected by federal, state or local law.