**Client Success Operations Specialist**

**Overview**

The Client Success Operations Specialist is responsible for supporting the client lifecycle, ensuring customer satisfaction, and driving revenue retention and growth through renewals and upsells. This role combines operational rigor, process management, and relationship management, acting as the connective tissue between clients, account managers, and internal teams. The ideal candidate balances data-driven insights and reporting with hands-on client support to help maximize customer lifetime value.

**Key Responsibilities**

**Client Lifecycle & Account Management (30%)**

* Partner with account managers and leadership to manage customer renewals, expansions, and upsell opportunities.
* Support onboarding and implementation processes to ensure clients achieve value from the product/service.
* Maintain client records, preferences, and engagement history in [CRM System Name] and other account management tools.
* Track client health metrics, identify at-risk accounts, and escalate issues as needed.
* Coordinate with internal teams (sales, product, support, marketing) to ensure client needs are met and expectations exceeded.

**Revenue & Retention Operations (30%)**

* Maintain renewal schedules and forecast renewal revenue in [CRM System Name].
* Identify upsell or cross-sell opportunities within existing accounts using account data and usage insights.
* Support contract management, proposal preparation, and pricing adjustments in collaboration with finance and sales leadership.
* Generate and analyze reports on retention, churn, and account growth metrics to inform strategic initiatives.

**Process Optimization & Enablement (20%)**

* Standardize workflows for onboarding, account check-ins, and escalation processes.
* Ensure consistent use of tools ([CRM System Name], [Customer Success Platform Name], [BI Tool Name]) across the client success team.
* Document processes, client engagement protocols, and best practices for scalability.
* Provide training and support to account managers and client-facing staff on systems, reporting, and operational processes.

**Data Management & Reporting (20%)**

* Maintain clean, accurate client data across all systems.
* Build dashboards and reports in [CRM System Name], [BI Tool Name], or [Customer Success Platform Name] to monitor client health, renewals, and upsell performance.
* Deliver actionable insights to leadership and account teams to improve client satisfaction, reduce churn, and increase revenue.

**Qualifications**

**Required**

* Bachelor’s degree in Business, Marketing, Finance, or related field (or equivalent experience).
* 2–4 years of experience in client success, account management, or customer operations role.
* Hands-on experience with CRM systems ([CRM System Name]) and reporting/analytics tools ([BI Tool Name]).
* Understanding of renewal, upsell, and expansion processes within a B2B environment.
* Strong communication, relationship management, and problem-solving skills.

**Preferred**

* Experience with customer success platforms ([Customer Success Platform Name], e.g., Gainsight, Totango, ChurnZero).
* Experience with workflow automation and integrations between CRM and customer success tools.
* Knowledge of contract management and subscription-based revenue models.
* Experience analyzing retention, churn, and account growth metrics.

**Success in this Role Looks Like**

* High client retention and renewal rates.
* Growth in upsell and cross-sell revenue across assigned accounts.
* Clean, reliable data across CRM and client success tools to inform decision-making.
* Streamlined client success processes that reduce manual work and improve client satisfaction.
* Strong alignment between client success, sales, and other internal teams.