
JOB DESCRIPTION

Role: Customer Success Associate, (Australia & NZ)
Direct Report: CEO
Location: Lower Hutt, New Zealand

Spotlight Reporting provides progressive accountants, CFOs and Finance Managers with an impressive range of dashboards, reports and forecasts that save time and effort while delivering clarity for business making decisions. We also assist accounting firms to transform their businesses by providing advisory education resources, allowing them to deliver further advisory services and earn new revenue.

We are an award winning truly transformational company at the forefront of the exciting and fast paced cloud accounting software industry. Our best-in-class software has been the No. 1 solution in the market for over 10 years, and we're only just getting started.

Position Summary

Enable customer success and optimised client experience by providing exceptional onboarding and account managing a cohort of subscribers across Australia and New Zealand.

Our team goal is to achieve optimal customer outcomes and long-term, high value subscribers for the company.

Customer Success is a post-sales team driving commercial value through user adoption of the Spotlight toolkit, purchased by the customer to achieve strong customer engagement, revenue retention and maximisation. Ensuring that a portfolio of Basic level customers are achieving this expectation from an investment in Spotlight tools is core.

This is a post-sales role which will portfolio-manage a cohort of (approximately) 200 Basic Accounting Firms, and a smaller portfolio of SVCFO firms, seeking to achieve exceptional levels of retention, success and satisfaction as per the Customer Success Playbook.

A secondary responsibility will be to work with the Customer Success Manager to develop and deploy an implementation program as a paid service offering to customers. This will enable the fast adoption of the Spotlight toolkit, and reduce the time to value length for the clients. This will need to be designed to scale up, and be deployed across a wider global market.

Core KPIs

- 100% Net Revenue Retention over a 12 month period (inclusive of churn, contraction and expansion)
- Reduce Churn, thereby increasing LTV
- Achieve Expansion targets by increasing customer engagement
- Account management to ensure Basic clients have been onboarded and are accessing the Training, online resources and Support to help them win
- Increase breadth and depth of usage
- NPS score in excess of 25 for this portfolio cohort
- Increase in-market presence and advocacy
- Contribute to an implementation strategy and educate Sales team on the value proposition
- Deploy implementation services to the market

Core Responsibilities

1. Enablement

- Deploy an on-boarding programme for all new Basic customers to ensure all key milestones of the first 100 days are achieved and internal onboarding sign off is completed every time.
- Provide ongoing customer success interactions per our structured programme of engagement

2. Grow Revenue

- Ensure upsell opportunities via quarterly or six-monthly Strategic Review are successfully achieved
- Look for and identify upsell and cross-sell opportunities
- Onboard upgraded SVCFO accounts in accordance with the Customer Success Playbook and provide ongoing account management to these higher value customers.

3. Revenue Retention

- Retain existing Basic customers NRR through the use of automated Flight plans, timely content and personal account management as is practicable.
- Achieve strong customer engagement, increased product usage, increasing the likelihood of revenue retention and maximisation.

4. Implementation

- Contribute to the implementation strategy
- Identify and approach suitable clients for implementation services
- Deploy implementation services as set out in the strategy
- Liaise with the Customer Success team, and Education, Training & Support team to scale up the implementation strategy globally.

5. Collaboration
 - Work with Customer Success Team, Marketing, Sales and Education Training & Support for optimised customer outcomes
 - Ensure other opportunities for customers to succeed are identified and progressed
 - Liaise with Finance team regularly to ensure onboarding outcomes achieved, and churn and downgrade requests are mitigated
6. Grow Advocates
 - Work with regional teams to ensure distressed accounts are turned into satisfied customers
7. Project Delivery
 - Support the Customer Success Team and CXO, with additional projects as required.

Key Attributes

- Highly organised and able to prioritise
- Task focused and able to follow process and instructions
- Ability to learn fast: become aware of our four products
- Discipline and structure
- Excellent written and verbal communication: you'll need to be clear, concise and accurate
- Highly self motivated
- Ability to think laterally and in the best interest of the customer and the company
- Familiarity and comfortable with technology
- Familiarity with accounting terminology
- Good humoured, positive and results-orientated
- Good attention to detail

Please submit both your Cover Letter and CV to danelle@spotlightreporting.com