
JOB DESCRIPTION

Role: Customer Success Specialist (Australia)
Direct Report: Customer Success Operations Lead
Location: Australia (Sydney)

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 is used and supported globally and we are looking for someone with passion to work with our customers as they scale their advisory services.

Position Summary

The Customer Success Specialist role exists to optimise the Spotlight Reporting subscriber experience by providing exceptional onboarding, training, resources and human contact to scale advisory services across a portfolio of Australian subscribers.

You will be working with a portfolio of subscribers to facilitate optimal customer outcomes and create strong customer engagement.

Core KPIs

- Reduce Churn, thereby increasing LTV
- Achieve Expansion targets by increasing customer engagement
- Account management to ensure clients have been onboarded and are accessing the Training, online resources and Support to help them win
- Increase breadth and depth of usage
- Increase NPS
- Increase in-market presence and advocacy

Core Responsibilities

1. Enablement

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

2. Build relationships

- Plan for and execute monthly face to face sniper visits to SCVFO customers
- Have meaningful conversations to understand how the customer uses Spotlight and identify areas for opportunity
- Deploy initiatives to help our customers to scale.

3. 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.

4. Revenue Retention

- Retain existing customers MRR through delivering timely content and personal service
- Achieve strong customer engagement, increased product usage, increasing the likelihood of revenue retention and maximisation.

5. 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 the Education, Training & Support team to scale up the implementation strategy globally.

6. 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
- Monthly Portfolio reviews with Sales, and Education Training & Support teams to ensure onboarding objectives are achieved
- Liaise with Finance team regularly to ensure onboarding outcomes achieved, and churn and downgrade requests are mitigated

7. Grow Advocates

- Work with regional teams to ensure distressed accounts are turned into satisfied customers
- Identify opportunities for advocacy in the market by presenting regular webinars, and attending industry events.
- Presenting at both client and strategic partner event and workshops

7. Brand Advocate

- Promote the profile, product and initiatives of the company in-market. This includes leading relationships and engagement with strategic partners, social media platforms and industry events.
- Liaise with other key stakeholders including Marketing, on sharing success stories via webinars, Powered by Spotlight initiatives and Blog Posts

8. Project Delivery

- Support the Customer Success Team and Customer Success Operations Lead, with additional projects as required.

This Job Description is not exhaustive.

Key Attributes

- Engaging and able to quickly build relationships with people
- An attentive listener
- The desire to be part of a team and work collaboratively with colleagues
- Highly organised and able to prioritise the different aspects of the role
- Embraces processes and guidance provided
- Ability to learn fast: become aware of our five products
- Excellent written and verbal communication
- Highly self motivated
- Ability to think laterally and in the best interest of the customer and the company
- Proficient with SaaS tools
- Familiar with accounting terminology
- Good humoured, positive and results-orientated
- Good attention to detail and follow through
- Competent public speaker
- Experience from within or in dealing with the Accounting industry is a plus.

This role is:

Full-time and permanent

Office based role with potential to work from home 1 day per week

Travel within Australia will be required

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