



# Client Success Manager

Department: Technology

Reporting: Manager, Professional Services

## **About Valeyo**

Do you want to make a difference? Valeyo is a fast-growing organization focused on delivering smart, innovative, cloud-based, lending and protection technologies for financial institutions across Canada. We work with over 100 financial institutions and 3<sup>rd</sup> party solution providers across Canada, helping change the lives of hundreds of thousands of Canadians every year. Valeyo is a technology-focused Canadian division of US based Securian Financial Group, a Fortune 500 company and the 8th largest Life insurance company in the US. Valeyo is in a unique position operating with the mindset of a startup while backed by the authoritative expertise of an industry leader. Valeyo's mission is to deliver the next generation customer experience in lending and insurance technologies and to consistently deliver new innovations through technology. We are driven by customer and market intelligence, data-driven insights and agile technology development to rethink the entire lending ecosystem. At Valeyo, whether you're an accomplished professional or a promising new talent, you'll have opportunities to continuously learn, grow and advance in your career. If you are results orientated and obsessed with exceeding customer expectations, we want you to be part of our team!

## **Duties and Responsibilities**

The Client Success Manager will be tasked with ensuring client satisfaction through keeping accurate correspondence records, meeting regularly with clients, consulting best practices, developing both internal and client facing resources, offering continuous value and is responsible for the overall delivery of our insurance and technology software solutions to our clients. This includes being the primary contact for software implementations, technology support, technology training and overall success of the client experience.

To successfully execute this role, the Client Success Manager should be able to perform the following key responsibilities:

- Own and manage a portfolio of clients to ensure success, growth, and retention
- Act as the key relationship holder, consultant, trusted advisor and primary point of contact to our clients for all technology matters while seeking opportunities to improve client satisfaction/performance
- Participate in technology implementations while working with the Project Management Office to ensure timely deliverables are met
- Develop subject matter expertise (SME) on our suite of Valeyo technology solutions and proactively find ways for clients to enhance their user experience
- Conduct value-driven in person and virtual client training on services and technology solutions
- Develop a deep understanding of our clients' business goals, objectives, and pain points and how it relates to our services and solutions
- Promote and execute continuous service improvement both internally and with clients in the areas of process improvement, efficiency gains and customer improvement (e.g. technology adoption, service, usage, etc.)

- Ensure successful on-boarding of new accounts in partnership with product and sales teams
- Regularly review goals, expectations, feature enhancement/changes and perform need assessments with clients to ensure they are in the best position to succeed with our technology solutions
- Collaborate with internal stakeholders and resource departments to create efficiencies, solution problems and deliver project and client expectations
- Develop and implement client specific strategy to ensure development and success through all stages of the post-sale client life cycle
- Own all client technology matters post-sale from end to end, including but not limited to training, support, implementation, project support for migrations/mergers and consultation to support business objectives.
- Create internal and external communications outlining deployments, product changes and ongoing issues/problems
- Create, manage and maintain a consolidated view of account health with respect to their technology needs for internal and external consumption
- Monitor client accounts for potential impacts to contractual commitments and liaise with the Account Manager to ensure delivery to those commitments

### **Qualifications / Skills and Experience**

- High ownership, accountability, passion and ability to work with sense of urgency
- Minimum 3 years experience in client success/consulting technology role
- Ability to collaborate and work with internal teams daily
- Thrives in rapidly changing environment
- Solution oriented mindset
- Ability to embrace and drive change
- Excellent Client facing skills with ability to engage with Senior & Key executives
- Strong technology understanding and experience
- Strong operational, project management, consulting technology and process skills
- Excellent communication and presentation skills
- Experience with incident management/escalations, problem management and continual service improvement
- Highly self-motivated and directed with strong time management skills
- Proactive problem solver with ability to analyze data and make educated recommendations
- Knowledge of lending processes and credit adjudication is an asset