



KATE CRAWFORD
R E C R U I T I N G

SENIOR CLIENT ADVISOR

NEW YORK • FULL-TIME • CLIENT SUCCESS/CLIENT ADVISORY

As a Senior Client Advisor you will work with a few of our largest, most complex clients to ensure they are maximizing the value of the product for their organizations. You will be responsible for partnering with them to help them adopt and achieve predictable business outcomes. You will track their usage and adoption, provide insights and best practices on how they better leverage the platform at an account level, (e.g., opportunities for workflow improvement,) and proactively help them address workflow gaps. You will work with sales, implementation, and product teams to ensure a coordinated approach to customers. You will also work closely with sales on upsells, expansions, and renewals.

What Makes This Job Awesome?

- **Relationship Building:** Build trusted advisor relationships with executive sponsors and all key stakeholders at your client accounts for how the platform is used to achieve desired business outcomes.
- **Detailed Product/Service Knowledge:** Be an expert on platform products and services and understand how they can be leveraged to help clients achieve desired outcomes. Act as a thought leader within the larger Customer Success team and company to share industry learnings and demonstrate best practices.
- **Client Outcomes:** Identify strategies and initiatives at the account level to help clients drive engagement and achieve desired business outcomes. Be a change leader with your clients and comfortable challenging clients on change where appropriate. Help communicate the value of these initiatives and drive customer referenceability and case studies
- **Client Engagement:** Responsible for establishing regular touch points with clients for account usage, adoption insights, and consulting topics. Partner with Sales to drive Executive Business Reviews with clients to demonstrate ROI and drive additional usage and upsells.
- **Risk Mitigation:** Proactively identify situations where clients are at risk of adopting or achieving their business outcomes and proactively identify solutions to address these (working closely with internal stakeholders - sales, product, exec leadership & support).
- **Internal Advocacy:** Be an internal advocate for customer needs, requirements, and feature requests across customer success, product and sales.



KATE CRAWFORD
RECRUITING

What Makes You a Great Fit?

- 5+ years in a client-facing advisory role
- A service-oriented ethos, strong business acumen and an ability to structure client problems into desired outcomes
- An understanding of SaaS customer success models
- Experience in mentoring and leading peers
- Experience managing, consulting, and negotiating with clients and helping them be successful.
- Strong analytical skills, with the ability to identify business issues, analyze data, draw conclusions, and develop actionable recommendations.
- Strong technical skills, with an ability to understand product functionality and how these can tie to business outcomes
- Exceptional organizational skills, with a proven track record of successfully managing projects to completion and precise attention to detail
- Comfortable in a fast-paced, entrepreneurial, and rapid-growth environment. Ability to work independently as well as part of a team.
- Proficient in Sales Force, Microsoft Office Suite (Word, PowerPoint, Excel) and Google Applications (Analytics, Docs, Sheets, Slides)
- An understanding of commercial real estate a plus

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