Recommended Job Description for Customer Success Operations Manager

Gainsight

We're hiring a Customer Success Operations Manager whose mission will be to drive the effectiveness and efficiency of our Customer Success team. You will report into the VP (or Director) of Customer Success and will be their trusted partner in defining customer success objectives, strategy, and tactics, and in implementing processes that scale.

Responsibilities:

Data
- **Reporting:** Report to executives and the board on past results and renewals and upsell forecasts, e.g. through dashboards and presentations
- **Analysis:** Track leading indicators of renewals and upsell, and analyze them to understand what's going well and what's not

Processes
- **Customer Lifecycle:** Determine the timing and content of touch points for CSMs along the customer journey, to drive optimal adoption and net promoter score
- **External Communications:** Coordinate with 1:Many Communications lead (within CSM team) to synchronize email outreaches with CSM touch points
- **Risk Management:** Detect early signals of at-risk renewals, design playbooks for CSMs to address them, and provide path to escalation
- **Opportunity Management:** Identify top candidates for upsell
- **Cross-Functional Coordination:** Coordinate cross-functional processes that help meet renewal and upsell targets and deliver on customers' needs, including processes for CSMs to:
    - Relay customer feedback to the Product team
    - Align with the Support team on resolution of major cases and report bugs to the Engineering team
    - Provide feedback to Sales on the readiness of our customers
    - Help the Onboarding team overcome any delays in implementation

People
- **Team Structure:** Tier existing customers, assign them to CSMs, re-distribute workload as needed, and forecast hiring needs
- **Compensation:** Determine the metrics on which bonuses are based, and define targets for those metrics
- **Enablement:** Provide materials and data that help CSMs work more effectively

Systems
- **Systems:** Implement and manage software that facilitates CSM Ops activities

Evaluation Criteria:
- Passion for designing processes that scale
- Ability to break down ambiguous problems into concrete, manageable components and think through optimal solutions
- Enjoys "getting their hands dirty" by digging into complex operations
- Takes high degree of ownership over their work
- Clear communicator with professional presence
- Strong listening skills; open to input from other team members and departments
- Ability to lead through influence