

Job Title: Customer Success Specialist

Location: Head office with home working and/or remote working

Reports to: Customer Success Pod Leader

Roles reporting to this role: N/A

Purpose of Role:

As a key revenue contributor, you will be responsible for driving growth within our existing customer base. You will blend excellent service with commercial acumen, actively identifying opportunities to upsell, cross-sell, and retain customers to meet monthly targets. You will turn satisfaction into success, ensuring customers stay longer, buy more, and love what we do. This is a proactive, performance-driven role that sits at the intersection of customer service and sales.

Role Responsibilities:

- Proactively identify and convert upsell and cross-sell opportunities across our product and service portfolio
- Take ownership of customer success KPIs including retention, expansion revenue, and NPS
- Build strong relationships with existing customers to ensure satisfaction and discover growth opportunities
- Deliver monthly revenue targets through consultative selling and value-led conversations
- Execute timely and effective retention calls to reduce churn
- Successfully onboard new customers via engaging presentations and service walkthroughs
- Confidently manage customer escalations and resolve issues to strengthen long-term relationships
- Log all customer interactions and sales opportunities accurately in the CRM
- Conduct root cause analysis and propose improvements that enhance customer experience and revenue outcomes
- Support the accounting and operations team with high-quality feedback and collaboration
- Stay current with product updates and industry trends to position solutions effectively
- Any other ad hoc duties as required for the role
- Drive your professional development, enthusiastically undertaking training and working towards progression
- Adhere to service excellence and the Company's core values

Role Objectives:

- Hitting 100% to individual monthly revenue target
- Hitting agreed weekly commits and activity KPIs
- Answer all tickets within SLA
- Respond to all internal emails or calls within 24 hrs

Attributes / Skills required:

- Proven ability to meet or exceed sales or retention targets in a customer facing role
- Confident communicator with strong influencing skills
- Commercially minded with a natural ability to spot growth opportunities
- Able to handle challenging conversations with professionalism and empathy
- Highly organised and able to manage multiple priorities effectively
- Proficient in Excel and other digital tools, such as Salesforce or other CRMs
- Self motivated and target driven
- Positive, professional and resilient
- Embraces change and thrives in a fast paced environment
- Collaborative team player with a strong work ethic

Experience Requirements:

- Experience in account management, expansion revenue focussed customer success teams
- Ideally experienced in a practice or accounting environment
- Background in working with small businesses or SMEs

Other Requirements:

- UK right to work status