

## Customer Success Manager

Customer Success Department · Full-Time

### TEAM

Customer Success

### REPORTS TO

CRO

### HIRING MANAGER

CRO

### ROLE SUMMARY

The Customer Success Manager works to the vision and strategy of the Customer Success Department while driving customer retention, expanding revenue, preventing churn, and capturing growth opportunities within the existing customer base. As the face of TrueRoll for our customers, the CSM owns end-to-end renewal execution and incremental revenue growth through deep customer relationships and proactive account management. The CSM works closely with the Team Lead, fellow success managers, Delivery and Operations, Product, Sales, and other cross-functional teams to achieve our core mission:

**ZERO churn · ZERO lost · ZERO slipped renewals every quarter.**

### DEPARTMENTAL RESPONSIBILITIES

#### ● Customer Retention & Loyalty

- Drive customer loyalty with the goal of more than 97% retention year over year
- Proactively communicate and champion customer needs internally
- Position as a trusted advisor through consistent, high-value engagement
- Establish strong relationships grounded in knowledge of customer requirements and commitment to measurable value
- Encourage all accounts to become TrueRoll references and advocates
- Effectively execute Quarterly Business Reviews

#### ● Net Dollar Retention (NDR) & Revenue Growth

- Execute end-to-end renewal cycles with discipline and accuracy
- Identify, qualify, and close upsell and expansion opportunities within the customer base

- Develop and maintain account plans that drive revenue targets and sustainable growth
- Forecast accurately against the renewal and expansion pipeline on a rolling basis
- Maintain CRM with up-to-date customer, opportunity, and pipeline information
- Understand each customer's needs, workflows, and strategic goals
- Educate customers about the full range of TrueRoll services
- Partner with Sales through the upsell process to drive successful closes

## INDIVIDUAL RESPONSIBILITIES

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### ■ Customer Health & Satisfaction

- Strive for high average customer satisfaction scores
- Monitor customer health, usage patterns, and risk signals proactively
- Conduct cadence calls, account reviews, and health assessments routinely
- Connect with customers regularly – virtually and in-person – to strengthen relationships and surface growth opportunities
- Maintain a minimum 24-hour response time for assigned accounts

### ■ Renewal Execution & Negotiation

- Maintain strong knowledge of TrueRoll contract terms and conditions
- Deploy negotiation strategies that are mutually beneficial to TrueRoll and customers
- Leverage internal TrueRoll resources to navigate contract creation, pricing, closing, and bookings
- Bring all TrueRoll product and service offerings to bear on expansion pursuits
- Understand TrueRoll's competitive positioning and differentiate effectively against alternatives

### ■ Pipeline & Account Management

- Follow a disciplined approach to pipeline maintenance – keeping opportunities current and progressing
- Develop effective and specific account plans aligned to each customer's strategic growth goals
- Leverage Marketing and Sales resources to identify and funnel expansion pipeline
- Coordinate internal teams to ensure strong positioning for all key customer touchpoints

## QUALIFICATIONS

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### REQUIREMENTS

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- Motivated to work effectively and independently while embracing virtual teamwork
- Strong communicator – written, verbal, and executive-level

### PREFERRED ATTRIBUTES

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- Bachelor's degree in Business, Communications, Public Relations, or related field
- 5+ years as a CSM, Account Manager, or renewals-focused

- Ability to work remotely as part of an asynchronous team
- Ability to learn and understand the TrueRoll product suite and property tax nuances
- Knowledgeable in commercial metrics and forecasting principles
- Embraces TrueRoll's core values and code of conduct

- role — ideally in public sector / SLED
- Demonstrated success driving renewals, retention, and expansion in a consultative environment
- Experience in contract negotiation or sales operations
- Proficiency with CRM platforms and pipeline management tools
- Experience in government, particularly an assessor's office
- Strong written and oral communication skills