



by Praxis Growth Advisors

## Job Description: Client Success and Marketing Manager

**Position Overview:** The Client Success and Marketing Manager plays a pivotal role in enhancing client satisfaction and retention, driving brand awareness in our local market, and providing essential support to sales and training efforts. The Client Success and Marketing Manager will excel in client engagement, marketing strategies, social media management, database management, CRM hygiene and Zoom meeting production while embodying a commitment to excellence and growth.

### Results Needed:

- Increase client satisfaction and retention rates through exceptional client success initiatives, including Sandler Online and assessment administration.
- Generate awareness about our company and services within our designated territory through effective marketing campaigns, creating brand awareness and generating leads.
- Provide crucial support for client training via Zoom, ensuring trainers can focus on delivering high-quality training and capturing content for participants to access for reinforcement.
- Connecting client success metrics with training delivery and intended outcomes for clients.

### Essential Job Functions:

- Client Success: Coordinate with client to ensure clients are fully supported and engaged in their training curriculum and can track and measure their success metrics.
- Sandler Resource Utilization: Locate and provide appropriate session previews in Sandler On-Line, track utilization and establish custom portals for corporate clients to house session recordings, customized tool creation and use within the client's sales process.
- Marketing: Develop and execute marketing strategies to create brand awareness, generate leads, and engage prospects within our designated territory.
- Social Media Management: Curate and schedule social media posts and ads on a weekly/monthly basis to maintain consistent online presence and engagement.
- Prospecting Outreach: Manage outreach process associated with sequencing run from HubSpot. Conduct outreach calls and connection engagement via LinkedIn.
- Zoom Meeting Production: Coordinate and produce client training on Zoom, ensuring seamless delivery and engagement with interactive slides, polls, and tools for concept retention.

### Skills:

- Strong follow-up skills to maintain ongoing client relationships and manage tasks effectively.
- Clear and effective written and verbal communication for engaging client interactions and marketing content creation.
- Ability to create compelling visual and written content to enhance marketing efforts.
- Proficiency in Zoom meeting production and management.
- Effective use of HubSpot for client engagement and marketing campaign tracking.
- Knowledge of ZoomInfo and LinkedIn Sales Navigator for list generation and targeting.

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- Proficiency in utilizing Office365 for communication and document management.

## **Experience:**

- Proficiency in HubSpot and Office 365 for efficient client engagement and communication.
- Experience with design tools like Canva or similar programs for creating visual content.
- Strong familiarity with Zoom, both for client training and internal meetings.
- Demonstrated ability to prioritize tasks and meet deadlines in a fast-paced environment.

## **Attitude:**

- Committed to excellence in client success and brand building through marketing efforts.
- Dedicated to personal and professional growth, fostering a mindset of continuous improvement.
- Humbly confident in interacting with clients, team members, and network contacts.
- Engaged with team, network, and clients, contributing positively to the overall company values.
- Proactive and flexible in approach, always seeking ways to enhance team and client experiences.

## **Results:**

- Ensure clients remain engaged and satisfied with their training curriculum.
- Drive brand awareness and lead generation through marketing campaigns and social media.
- Produce client meetings via Zoom, enabling trainers to focus on training content.
- Provide essential support to trainers in their interactions with clients.
- Delivery a steady stream of new opportunities for sales to engage with and close.

## **Cognitive Skills:**

- Proactive mindset, capable of anticipating needs and addressing challenges before they arise.
- Quick thinking to handle unexpected situations and adapt strategies as needed.
- Proficient in responding to client needs and skilled in understanding social cues.
- Effective at asking insightful questions and actively listening to client and team needs.
- Strong organizational skills to maintain order and efficiency in tasks.

## **Habits:**

- Consistently schedule and manage social media posts and email blasts on a consistent basis.
- Regularly check for leads and respond promptly to inquiries.
- Develop and deploy email templates and campaigns, automating client and prospect contact.
- Follow up with clients as needed, ensuring ongoing support and satisfaction.
- Continuously seek opportunities for professional development to enhance skills and knowledge.