

# Client Success Manager (Fractional)

**Company Overview:** Bright Referral is an innovative startup in the dental industry that is revolutionizing how practices manage, track and grow referrals in their networks. Our seamless platform combines cutting-edge technology with deep industry expertise to empower our clients to fully understand their referral network.

**Position Overview:** This is a fractional position with a flexible schedule, ideal for ambitious, high performing Treatment Coordinators or dental industry veterans. As our first Client Success hire, you will be instrumental in ensuring our clients receive maximum value from our product and establishing department-wide best practices. You will serve as a primary point of contact for new and existing clients, building strong relationships and guiding them to success with our product. The ideal candidate is empathetic, patient, proactive, organized, and possesses a deep understanding of the orthodontic and broader dental specialty industry.

## Responsibilities:

- **Client Onboarding:** Lead the onboarding process for new clients, ensuring a smooth transition onto our platform for clients and their referring doctors. Collaborate closely with partners and clients to ensure onboarding materials are produced to standards and clients' needs are met throughout the onboarding process.
- **Client Support:** Proactively monitor internal metrics to identify at-risk clients and take appropriate steps to mitigate churn. Act as the escalation point for any client issues or concerns, working closely with cross-functional teams to ensure timely resolution and a positive client experience.
- **Department Leadership:** Develop and refine best practices and department-wide standard operating procedures and guides.
- **Network Expansion:** Identify opportunities for clients to deepen relationship and expand their use of Bright Referral throughout their referral network.
- **Relationship Management:** Develop trusted relationships with key stakeholders within client practices. Serve as their advocate internally.
- **Training:** Conduct training sessions, both remote and onsite when necessary, to educate users on the features and functionalities of our platform. Promote best practices to ensure clients are maximizing the benefits of our software.
- **Client Feedback Management:** Gather client feedback and insights to inform product roadmap and development priorities. Provide input on new feature requests and enhancements based on your understanding of client pain points and business objectives.
- **Documentation and Reporting:** Maintain accurate records of client interactions and transactions using our CRM system. Generate regular reports on client success metrics, such as adoption trends, satisfaction levels, and retention rates.

## Qualifications:

- Proven experience in a client-facing role, preferably in client success, account management, or consulting.
- Experience working with SaaS platforms and a strong understanding of software implementation processes.
- Experience working in a startup environment and ability to navigate multiple duties and shifting priorities while retaining focus on client experience.
- Excellent communication skills, both verbal and written. Ability to convey technical information to non-technical audiences effectively.
- Strong analytical skills with the ability to interpret data and trends, diagnose problems, and formulate effective solutions.
- Passion for client service and satisfaction, with a demonstrated ability to build rapport and maintain strong relationships.

**Preferred Qualifications:**

- Experience in the dental industry and familiarity with dental practice management systems.
- Previous experience leading and growing teams.
- Experience with CRM systems (e.g., Pipedrive), project management systems (e.g., Monday.com), and client support tools.

**Benefits:**

- Competitive salary and performance-based bonuses.
- Flexible work hours, focused on accountability and productivity, not hours logged.
- Opportunities for rapid professional development and career advancement in a fast-growing startup environment.
- Mostly remote team with offices available and occasional in-person meetings and team building.

**Join Our Team:** If you are passionate about client success and excited to make a significant impact with an organization, we want to hear from you! To apply, send an email to [ben@brightreferral.co](mailto:ben@brightreferral.co) with “Fractional CSM” in the headline. Please include your resume and a note in the body of the email briefly outlining what you see as the biggest issue facing the dental industry today.