

## Client Manager

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### Job Description:

#### What we are looking for:

We are a fast growing SaaS company that is changing the FinTech application development (non-OMS) landscape. We are looking for a passionate, creative, detail-oriented and personable Client Manager that is a champion to our clients and ensuring they are setup for success with the CorpAxe platform. You must enjoy working in a small, collaborative team that is focused on building a world-class application platform. If you're passionate about shaping the future of FinTech, this is the job for you.

#### What you will be doing:

- Ensure that all clients derive maximum value from their subscription investment;
- Identify, analyze, and remove roadblocks to growth to ensure client success;
- Develop success plans for each client;
- Identify and grow opportunities within each account (expansions, integrations, additional features, etc.);
- Persuade customers to renew annual subscriptions, maintain high client retention rates;
- Thoroughly document all client interactions in our CRM software;
- Understand our company's strategic and competitive position, and be an effective advocate for our product;
- Continuously communicate product features and enhancements to our client base and configuring it based upon client specific use cases and objectives;
- Drive product improvements and help inform product development initiatives by listening to client feedback and relaying it to our product management team.
- On-board new clients, managing all aspects of the account configuration, user administration and provide product training based upon client specific use cases and objectives;
- Diagnose and resolve complex issues; escalate unresolved cases and communicate effectively with team members and leadership to ensure timely resolution;
- Rapidly and efficiently respond to incoming client support calls and emails;
- Provide web-based training and product implementation support;
- Follow up and settle all client requests to satisfactory conclusion;

# Requirements:

## Must Haves:

- 3-5 years' prior experience in customer success, account management, customer service or technical support in a SaaS company.
- Lead and manage prospects and customers through integration and implementation of business features, including SSO, API integrations, analytics, and reporting
- Experience building and debugging web applications and APIs
- Experience in obtaining and synthesizing feedback from various sources.
- Able to understand and communicate client requirements into technical deliverables (estimate tasks and time required) with our product team.
- Strong technical skills including advanced Excel and data analysis.
- Strong understanding of web-based technologies, curiosity and enthusiasm.
- Exceptional communication and presentation skills for telephone support, demos, and training.
- Strong organizational skills, excellent follow-through, and solid attention to detail.
- Self-starter and interested in working in a fast-paced startup environment.
- Resourceful: you don't always have all the answers, but you know where to find them.

## Nice to Haves:

- Interest in finance and improving workflows between the buy-side and the sell-side
- Prior experience as a Client Manager in the SaaS industry with a focus on the enterprise business market

## Education:

- Bachelor's degree

## Location

- New York City

## About CorpAxe:

CorpAxe is the world leader in corporate access and resource management solutions for the investment community. The CorpAxe suite of products allows investors to discover, originate, manage, and value resources critical to the investment process, while meeting the demands of a rapidly changing regulatory environment.

Note to recruiters: CorpAxe does not accept unsolicited resumes from recruiters and/or placement agency resumes. We will not pay fees to any third-party agency or company that does not have a signed agreement with CorpAxe.