

Customer Success Advocate

Job Description

I. Position Title: Customer Success Advocate – CSA level 1

II. Summary of Role:

The Customer Success Advocate (CSA) is a critical role in our WolfePak Software business model. The CSA will ensure that maximum value is derived from WolfePak products and services by quantifying the value, driving adoption, sharing best practices, answering business questions, identifying opportunities and developing strategic goals and objectives. Ultimately, the CSA's goal is to ensure that the value derived from the WolfePak solution far exceeds customer's expectations; as such, the role requires customer management experience. Additionally, this role relies heavily on personal accountability for results, a willingness to go 'the extra mile' for WolfePak customers and a collaborative approach that brings the best of WolfePak to each and every customer.

III. Qualifications:

- Minimum 1-2 years' work experience in accounting or applicable education/certification.
- Oil & Gas accounting knowledge/experience is a plus.
- Familiar with change management practices, change communications and process re-engineering. Accountable for results and deliverables; self-starter who works independently and proactively.
- Ability to listen to customer needs, find a solution to meet those needs, and communicate that solution to management and client.
- Excellent interpersonal/customer relations skills; clear and concise verbal and written communicator, effective in person and by phone.
- Working knowledge of Microsoft Office Suite.

IV. Key Responsibilities:

- Serves as trusted advisor and thought-partner for customers
- Proactively develops the adoption and measurement plan as well as solution "course corrections" as necessary
- Respond to client emails/phone calls in a professional manner.
- Prepares materials to support articulation of WolfePak benefits to customer teams
- Collect information in regards to software enhancements by working with clients designing, developing, and troubleshooting new and existing software programs.
- Assess client needs and recommend additional products to ensure clients are utilizing the software to meet their company's ever-changing needs.
- Communicate with clients, teammates, and subject matter experts to assist with resolving client needs.
- Review and test each new release for quality assurance.
- Create and maintain training and class documentation.

V. Benefits WolfePak offers a casual business work environment, generous PTO, and a competitive compensation structure that includes sales commissions, 100% employee paid health insurance and a matching 401(k)-retirement plan. We have a positive culture designed around the philosophy of mutual respect and the challenge of contributing to the continued success of our organization. WolfePak is

dedicated to individual growth opportunities and would love the opportunity to discuss with you in more detail!