CLIENT ONBOARDING SPECIALIST

Mogli Technologies delivers a native Salesforce application for SMS and WhatsApp communications and impeccable Salesforce implementation services to global education organizations, nonprofits, social ventures, foundations and international development organizations, and an expanding base of commercial organizations. Our products and implementations are easy to use and have robust functionality. Our fantastic team members have won the loyalty of clients around the world. We are a small, high-trust team with a focus on accelerating the success of our clients globally.

We're looking for a Client Onboarding Specialist to join our team and report to the VP of Operations. We want you to work alongside our Client Success team & make the onboarding experience effective for our clients. The ideal candidate for the Client Onboarding Specialist role is one who has experience with web-based technologies, has high energy, is passionate about solving client needs, has good communication and project management skills, and yearns to learn new things. This is a person who ensures our clients get the value they signed up for by guiding them through their first experiences with Mogli SMS. They'll ensure client success by facilitating a seamless implementation and encouraging adoption, beginning immediately post-sale. They'll educate our clients on product features and the details of their Mogli SMS configuration. Ultimately, the onboarding processes aim to improve client retention and minimize churn.

<u>What we hold sacred around here:</u>
Trust. We authentically extend trust in our relationships and all that we do. We seek to create a culture where you will thrive, have the autonomy to do your best work, and serve clients the way you have always wanted to.
Empathy. It's a powerful characteristic that's about being in tune, seeing, knowing, and understanding while also relating as a human in a tech-minded world. Instead of serving our own interests, we are wired to serve others. Drive without purpose and intention isn't our gig.
Hustle & Tenacity. We are a driven group of individuals who are happiest in motion. We take pride in delivering exceptional experiences for our clients. We are invested in setting people up to succeed, and when there are challenges, we will stay with it through resolution.
Creativity. This characteristic is essential in what you do and how you do it. Whether through our tech, how we support our unique client needs, or how we creatively scale and grow with each other, a creative approach often makes the difference in showing up fully for our clients and each other.
Growth Minded & Open to Change. Mogli is in growth mode and being at ease with change will help you succeed and evolve with us.

<u>Some traits we're looking for, from you:</u>
- You are process minded; adept at taking disparate information and creating coherence
- Excellent verbal and written communication skills.
- Excellent sales and customer service skills with a proven ability to explain, document or demonstrate technical products/solutions to non-technical audiences.
- Ability to "read the room" and adapt a training plan whether in a 1:1 or group training and be able to deliver the training in an appropriate way for the needs of the trainees
- Ability to apply engineering, technology, or other related principles to product sales
- Excellent project management and organizational skills, and attention to detail

- You communicate with candor; openly communicating both success and also when things are heading off track
- You are capable, willing and can learn, evolve and manage various clients at once
- You are tech-savvy and can learn tools, and research new ones with ease
- You are a team player and get excited about our client's success
- You are a multitasker and can juggle multiple competing priorities with grace

What your day to day looks like:
- Ensure client success by implementing a tiered, fun, engaging, and dynamic client Onboarding program and training curriculum, in collaboration with the Director of Client Success, VP of Operations, and CRO
- Assist clients to feel comfortable and reliable with Mogli SMS
- Provide customized training sessions to clients
- Provide timely and ongoing updates to clients on their progress within the onboarding program, including next steps and requirements, in efforts to reduce time to value and increase early engagement.
- Enhance and improve communication between key stakeholders to ensure alignment on requirements, timelines, action items, and next steps
- Record and resolve client questions, problems and requests via Salesforce Cases within contracted SLA timeframe (24-48 hours based on client type)
- Maintain up-to-date and relevant information on the status of client onboarding on Salesforce Cases (promoting cross-team visibility)
- Assess and understand systems requirements during the client onboarding process, in conjunction with AEs, AMs, and Solution Engineer (if applicable)
- Work with clients to set initial Client Use Cases and develop a success plan
- Establish and implement key touchpoints for client feedback
- Report on the performance of the Onboarding program, including key metrics determined with your manager
- Implement a transitional training process for clients with significant plan upgrades, including, but not limited to, understanding requirements, configuration needs, Client Use Cases, curriculum, and other success metrics.
- Strong internal cross-team communication, including, but not limited to:
  - Working with the Client Success Team to review and provide details/instructions regarding customizations/automations that were implemented in the onboarding process
  - Facilitating a seamless handoff process between AEs, Onboarding, Client Success & Solutions Engineering teams (where applicable)
- Collaborate on creating a reliable process for managing and sending clients Mogli swag and other incentives
- Provide product feedback to the Product team of issues or common themes you witness while onboarding new clients
- Assist with building a self-serve knowledge base, webinars, and client support center to maximize excitement and product adoption
- Maintain and advance professional and technical knowledge by attending educational workshops and reviewing professional publications to ensure your growth in the ecosystem and with innovative training programs and methodologies

What you bring to the table:

- Bachelor's degree
- 2-4 years managing customer accounts and/or directly interacting with customers
- Individuals must be able to work well with company leaders and employees and to proactively recognize and implement superior customer service to clients
- Deep experience with Salesforce is required (multiple certifications are preferred)
- Strong analytical and problem-solving skills
- Strong project management & communication skills
- An ability to be a self-starter, take independent initiative and work on multiple projects simultaneously
- Foreign languages fluency and/or nonprofit and international development experience is a bonus, but not required

Compensation and Benefits:

- $70-80K, dependent upon experience - Includes variable bonus
- Complete Medical, Vision, and Dental insurance, fully covered by Mogli
- STD, LTD & Life Insurance
- Matching 401k plan
- Flexible Time Off, 9 US Public Federal Holidays, 6 paid sick days
- Work from anywhere

Please submit a cover letter and resume to jobs@mogli.com.