

DIRECTOR OF CLIENT SUCCESS

Mogli Technologies delivers impeccable Salesforce implementation services to global nonprofits, social ventures, foundations, and international development organizations. Our systems are easy to use and have robust functionality. Our fantastic client services team has won the loyalty of clients around the world. We are a small, high trust team focused on accelerating high-impact organizations.

The Director of Client Success role is critical to the overall success of Mogli, our clients, and partners. This role is responsible for building and leading the Client Success Manager (CSM) team in their technical support and encouragement of product adoption for the Mogli SMS & WhatsApp application. The Director of Client Success leads CSM operations by building efficient processes, monitoring Cases, establishing and tracking the progress of CSM KPIs, and fostering collaboration between the Product, Marketing, Services, and Sales teams. All Director-driven initiatives are aimed at achieving successful use of the application by clients to ensure long-term recurring revenue. The Director of Client Success reports to the VP of Operations.

What we hold sacred around here:

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.

Some traits we're looking for from you:

- Strong interpersonal skills -- the ability to lead and inspire internal collaboration and to craft exceptional client and partner support and engagement.
- Ability to create strategies, implement them, track performance, and achieve set objectives.
- Must be an analytical thinker with keen problem-solving; process development and improvement; as well as task planning and delegation skills.
- Proven record of driving customer satisfaction and enhancing customer experience in past work.
- Must be able to actively participate in meetings with C-Suite executives and contribute unique perspectives and value.
- Ability to anticipate business value concerns, poor ROI, and related deployment obstacles.
- Identify business needs for growth, productivity improvement as well customer experience improvement opportunities.
- Foster and support a strong culture and loyal team.
- Is able to stay "cool under pressure" and creatively problem solve in a dynamic environment of team, product, client and partner relationships.
- Passionate about educating, mentoring, encouraging, and advancing the success of others.

What your day to day looks like:

Collaboration with Leadership

- Collaborate closely with leadership to define, plan for, market (internally & externally), and roll out structural shifts to the CSM team to prepare for ongoing scale.
- Collaborate with VP of Operations on developing strategic and operational goals
- Execute directives from the VP of Operations and leadership team
- Report on CSM KPIs to VP of Operations
- Work closely with CRO and Product team

Building, Structuring, & Mentoring the CSM Team

- Establish, maintain, and lead the CSM training and onboarding structure (remote & in-person)
- Hold and report on CSM 1:1s, pulses, and quarterly performance reviews
- Support, monitor, and manage CSM KPI progress, including but not limited to NRR, Case metrics, expansion, NPS, reviews, and successful Client Use Cases
- Organize and maintain all internal CSM documentation
- Provide multiple CSM support blocks per week
- Review, manage, and approve CSM requests for professional development initiatives
- Facilitate smooth client handoffs from the Sales team and to the Services team
- Determine and manage CSM tech stack and makes recommendations for improvement
- Identify CSM opportunities for continuous improvement and professional growth
- Appropriately manage peer escalations
- Support the CSM hiring process and role transitions

Refine, Optimize and Advance the Client Journey & Experience

- Refine, evolve and execute Mogli's vision of exceptional client success
- Identify inefficiencies in the client journey and make recommendations for improvement
- Lead and support implementation of a sustainable client support structure, including formalizing the offboarding process
- Co-create and evolve client training modules, videos, and external documentation
- Iterate and build a robust trial system for prospects
- Create, establish, monitor, and report on client feedback via health score indicators, including but not limited to NPS, NRR, Cases, escalations, and retention rate
- Communicate with clients en masse by creating important email announcements via HubSpot

Case & Client Management

- Monitor all Cases, auditing to maintain data integrity
- Manage red accounts, performing daily follow-ups with clients who have ongoing, outstanding Cases
- Appropriately manage client escalations
- Report on requested Case metrics
- Incrementally transfer existing clients owned over a period determined by management
- Assign new clients to CSMs

Internal Salesforce Environment (CSM Systems)

- Act as administrator for internal CSM systems (for example: setting Case OOO during company holidays)
- Derive monthly feedback from CSMs on internal systems
- Coordinate advancement of systems with Salesforce Administrator & Operations team Create & monitor robust reports and dashboards to track CSM KPIs

All-Company & Cross-Department Involvement

- Provide CSM team updates to company as needed at monthly All-Company meetings
- Collaborate with the Product Manager to support streamlined testing processes and release cycles



- Collaborate with the Product Manager to hold monthly product education cross-training sessions for all Mogli team members
- Recognize and understand new features/releases in our products and in Salesforce; communicate changes in Salesforce that create a potential need for changes in our product
- Support messaging partner relations on behalf of CSMs and Sales team when appropriate (including but not limited to Twilio, Telnyx, Telerivet, 10DLC, hosting eligibility)
- Assist with training on DEI policies

Marketing Contributions

- Collaborate with Marketing team to organize, market, and host monthly webinars on a variety of topics
- Collaborate with Marketing team to share Client Use Case success stories and facilitate bi-annual reports and marketing materials
- Participate in field marketing at select events

What you bring to the table:

- 4+ years of experience in a Client Success or Account Management role in at a SaaS company or in an agency setting
- 2+ years of experience managing teams, including KPI & goal setting
- Exposure to subscription and renewal-based business processes, upselling, or cross-selling as well as deep knowledge of and experience in implementing Client Success best practices.
- Proven ability to drive increased value, retention, customer satisfaction, and ultimately expansion of the Mogli footprint.
- High EQ and ability to lead with positive influence

Here are some other qualities we really hope you have (but aren't deal-breakers for the right person)...

- Bachelor's degree + MA or equivalent work experience in Client Success
- 3+ years internal operations experience
- Salesforce Admin certification
- Experience working with education, nonprofit, and financial services organizations

Salary and Benefits

- \$100-140K, dependent upon experience
- Complete Medical, Vision and Dental insurance, fully covered by Mogli
- Matching 401k plan
- Time off: Flexible Time Off, 9 US Public Federal Holidays, 6 paid sick days
- Base pay and bonus incentives for productivity milestones set by management

To apply, send a cover letter and resume to jobs@mogli.com.