



JOB DESCRIPTION

TITLE:	Customer Success Manager	DATE:	08/2021
REPORTS TO:	SOD	FLSA STATUS:	Exempt
DEPARTMENT:	Sales & Sales Support	MGT/SPVR:	No

PIVOT INTERIORS

Our organization includes a strategic team of big thinkers and creatives who truly work interdependently. Whether designing projects for our innovative clients, developing multi-pronged marketing strategies, or delivering a preeminent customer experience, we are constantly finding ways to underscore our promise to partner with our clients to make inspiring spaces that unlock their people's greatest potential. The pace is fast, the learning is constant...but as part of a team this driven, the possibilities are endless.

Your Role At Pivot

Pivot creates workplace environments to enable people to do their best work and as Customer Success Manager, you will be responsible for the successful outcome of these projects. You will act as the primary point of contact for the customer, guiding final selections and maintaining project schedules and ensuring the best outcome. You will liaise with your internal project team members to ensure that all deliverables and deadlines are met. You will act as an advocate for the customer, communicating feedback and status updates to the internal team and leadership.

ESSENTIAL DUTIES AND RESPONSIBILITIES *include the following. Other duties may be assigned.*

- Foster and manage strong relationships with clients.
- Execute successful hand off from Business Developer and work with project team to define the scope for assigned projects, plan required resources and schedule, manage project execution and project close-out including punch items.
- Confirm project pricing including discounting and margins, leveraging all budget quoting tools and platforms.
- Perform special analysis and/or planning (site verification, phasing of product for order entry, request installation quotes, etc.).
- Responsible for accurate specifications; fabrics, finishes and discounting (within margin guidelines), on all final proposals submitted to clients.
- Communicate to project team (internal and external partners) final schedule (including lead times), scope of services and project description to ensure clarity and understanding for excellent project execution.
- Communicate and sell design, installation, project management, and other services as appropriate.
- Execute project management, following standard project management processes and guidelines.
- Work with Sales Operations Director to determine when additional Project Management department assistance is needed and scope of additional support.
- Represent Pivot Interiors at client project/construction meetings with the contractor, client, and building management parties.
- Facilitate changes to scope of work and obtain approved change orders as needed.

- Assess risk with site evaluation, project design, and scope of work, and make appropriate recommendations to mitigate risks.
- Ensure that installation work is executed in compliance with contracted scope of services.
- Confer with project personnel to provide technical advice and to resolve problems.
- Obtain acceptance from client representative upon completion of project.
- Ensure swift resolution of punch-list and outstanding items.
- Work with accounting department to provide prompt and courteous follow-up and investigation of delinquent accounts as necessary.
- Transition newly acquired clients to Account Manager/Day 2 Services as appropriate.
- Maintain a current working knowledge of industry trends, market conditions and related products, applications, and design concepts.
- Consistently devote time to personal and professional development.
- Perform other duties as assigned.

JOB QUALIFICATIONS: Knowledge, Skills and Abilities

- Effective communicator/influencer with attention to detail and the ability to manage multiple projects.
- Strategic thinker with quality and depth of decision-making.
- Performance driven professional with strong technology skills.
- Proficient with various CRM and Project Management software tools.
- Proficient in Microsoft Office Suite, Word, Excel (good, better, best scenarios), and Power Point (Finish approval documents).
- Upholds the importance of being customer focused, always acting with customers in mind and dedicated to meeting the customer's expectations, adjusting the strategy as needed.
- Builds and sustains productive working relationships and networks across a diverse people and departments.
- Proficient in a variety of Project Management concepts, practices, and procedures.
- Relies on experience and judgment to manage competing priorities and independently plan and accomplish goals.
- Demonstrates integrity and trust by acting ethically and gaining the trust and respect of others.
- Excellent communication, - writes, speaks, and presents information accurately, concisely, and compelling across communication settings and to a variety of audiences.
- Must possess a valid driver's license and a good driving record.

SUPERVISORY RESPONSIBILITIES

This position has no permanent supervisory responsibilities, but duties require the Customer Success Manager to temporarily direct and coordinate the actions of several different supporting positions within the project team as needed.

QUALIFICATIONS *To perform this job successfully, an individual must be able to perform each essential duty satisfactorily. The requirements listed below are representative of the knowledge, skill, and/or ability required. Reasonable accommodations may be made to enable individuals with disabilities to perform the essential functions.*

EDUCATION and/or EXPERIENCE

Bachelor's degree (B. A.) from four-year college or university, architectural or interior design school. Three to five years related experience and/or training (such as project administration or project management or interior design) may be substituted for some experience or formal education requirements. Working knowledge of furniture systems and electrical / cabling issues essential. General understanding of building systems and

building codes essential. Previous project-related supervisory experience required. Demonstrated ability to logistically plan all phases of the project cycle essential.

LANGUAGE SKILLS

Ability to read, analyze, and interpret general business periodicals, professional journals, technical procedures, or governmental regulations. Ability to read and analyze architectural drawings and blueprints. Ability to write reports, and business correspondence (such as proposals, quotations, letters), in English. Ability to effectively present information, written and verbal, in English, and respond to questions from groups of managers, clients, vendors, and the general public.

MATHEMATICAL SKILLS

Ability to calculate figures and amounts such as discounts, interest, commissions, proportions, percentages, area, circumference, and volume. Ability to apply the algebraic and geometric concepts involved in project design desirable.

REASONING ABILITY

Ability to solve practical problems and deal with a variety of concrete variables in situations where only limited standardization exists. Ability to interpret a variety of instructions furnished in written, oral, diagram, or schedule form.

CERTIFICATES, LICENSES, REGISTRATIONS

Proof of valid California state drivers' license, and proof of insurance of an operable vehicle required.

PHYSICAL DEMANDS *The physical demands described here are representative of those that must be met by an employee to successfully perform the essential functions of this job. Reasonable accommodations may be made to enable individuals with disabilities to perform the essential functions.*

While performing the duties of this job, the employee is regularly required to sit; concentrate intensely; talk and hear. The employee frequently is required to stand; walk; and use hands to finger, handle, or feel, and operate a computer keyboard, mouse, and telephone keypad. The employee is occasionally required to reach with hands and arms and stoop, kneel, crouch, or crawl. The employee must regularly lift and/or move up to 10 pounds, frequently lift and/or move up to 25 pounds, and occasionally lift and/or move up to 50 pounds with assistance and/or equipment. Specific vision abilities required by this job include close vision, distance vision, color vision, peripheral vision, depth perception, and ability to adjust focus.

WORK ENVIRONMENT *The work environment characteristics described here are representative of those an employee encounters while performing the essential functions of this job. Reasonable accommodations may be made to enable individuals with disabilities to perform the essential functions.*

While performing the duties of this job, the employee is occasionally exposed to moving mechanical parts, outside weather conditions, and risk of electrical shock if working at client site. The noise level in the work environment is usually moderate.