



Customer Success Consultant (CSC)

**Job Description for Full-Time Position
Based out of Hillsboro, Oregon Corporate Office
Reports to: Learning and Development Manager**

Summary:

The Customer Success Consultant (CSC) acts as an account manager for new customers, overseeing their deployment process and helping to coordinate the different teams involved to ensure a smooth deployment through Go Live and for a six-month follow-up period thereafter.

The CSC is also primarily a trainer, for both new and existing customers, instructing customers on how to use and customize the MaximEyes electronic health records (EHR) and practice management system (PMS), as well as reviewing workflows to guide the client on how to improve office efficiency.

Additionally, the CSC develops training material, including how-to documents, guides, FAQs, webinars, videos, webinars, and power training course content.

The CSC also may be asked to assist the sales team in demoing EHR and practice management software to potential customers at trade shows and in live web demos, leveraging their in-depth product knowledge to help secure new sales.

Responsibilities:

- **Account Manager for New Customers:** Guide clients through the deployment and training process past Go Live, and ensure a successful implementation.
- **New and Existing Customer Training:** Conduct training and ensure successful customer adoption of MaximEyes features.
- **Training Materials:** Develop and update training materials, such as how-to documents, guides, FAQs, webinars, videos, etc.
- **Product Demonstrations:** Assist the sales team and provide product demonstrations for customers and sales prospects via online demos and at industry trade shows.
- **Feedback to Engineering and Product Specialists:** Provide feedback about product features and customer use.
- **Escalated Clients:** Work with clients for retention and/or increase customer satisfaction.



Skills and Qualifications:

- 2+ years of training experience with an ability to train, evaluate, and collaborate effectively with others
- 1+ years of experience working with optometry, ophthalmology, optical, and eye care industry partners and practices
- Strong billing and insurance knowledge
- 1+ years of experience using practice management and EHR software
- Troubleshooting and technical support experience recommended
- Strong customer relations, written and verbal communication skills
- Ability to problem-solve issues
- Expert knowledge with Microsoft Office (Word, Excel and PowerPoint) and Google Suite (Docs, Sheets and Slides)
- Strong written/oral communication and interpersonal and problem-solving skills
- Ability to work effectively, efficiently, and independently in a fast-paced environment and motivated to achieve outstanding results
- Ability to prioritize multiple projects and respond to changing priorities based on deadlines and requests
- Ability to travel to industry trade shows