

Client Success Manager at Tier 11

Seniority: CSM 1-3 (Junior to Senior)

Title: Client Success Manager

Department/Team: Client Success

Reports To: Ang

Desired Location: USA and Canada (Open to LATAM?)

Timezone of Operation: PST to EST

Employment Type: Full-time

1. WHY THIS ROLE EXISTS AT TIER 11

The Client Success Manager serves as the vital bridge between Tier 11's purpose-driven clients and our specialized delivery teams, ensuring seamless communication and exceptional client experiences throughout the Conversion Engine journey. As the primary client partner, you orchestrate the client relationship while our Growth Strategists drive marketing strategy and Expert Individual Contributors execute specialized tactics. Your role is essential to Tier 11's client-centric approach, managing expectations, capturing business goals, and ensuring our pod structure delivers on its promise to help businesses achieve their vision through data-driven digital marketing.

You capture the client's 'why' (their business goals and desired outcomes like achieving a \$40 NCAC) and ensure these are clearly communicated to the Growth Strategist who then defines 'what' needs to be done strategically, while Expert Individual Contributors determine 'how' to execute. You maintain the pulse of client satisfaction while managing project administration with precision. Your success directly impacts Tier 11's ability to maintain <5% churn and build lasting partnerships with premium D2C ecommerce brands.

As a Client Success Manager, you are:

- **The Client's Trusted Advocate:** Building deep relationships and ensuring client voices are heard throughout the organization
- **The Operational Orchestrator:** Managing project timelines, deliverables, and cross-functional coordination with excellence
- **The Expectations Guardian:** Proactively managing scope, communicating progress, and maintaining alignment between client goals and team execution

2. ACCOUNTABILITIES THE ROLE MUST OWN (The "A" in RACI)

Client Relationship Excellence:

- Has ultimate ownership for ensuring client satisfaction scores exceed 90% and bears full organizational accountability for relationship health
- Maintains final decision-making authority over client communication cadence and meeting structures with power to adjust engagement models
- Answers directly to leadership for client retention and has authority to escalate strategic concerns requiring intervention

Expectation Alignment:

- Has ultimate ownership for ensuring documented alignment between client expectations and Tier 11's service delivery capabilities
- Maintains veto power over scope changes that could compromise project success
- Answers to leadership for preventing scope creep and maintaining clear service boundaries

Crisis Response Coordination:

- Serves as first responder for client crises, immediately engaging Growth Strategist for strategic resolution while maintaining client confidence
- Bears accountability for initial crisis containment and clear communication during critical situations

3. RESPONSIBILITIES THE ROLE MUST OWN (The "R" in RACI)

Client Communication Management:

- Directly executes client check-ins via Slack, email, and scheduled calls following established communication protocols on daily/weekly basis
- Conducts weekly strategic alignment meetings with assigned Growth Strategists to ensure unified client approach
- Performs real-time issue triage by monitoring client channels and escalating strategic concerns to Growth Strategist

Meeting Facilitation & Documentation:

- Directly executes preparation of meeting agendas using client input and team updates in time for scheduled calls
- Creates and delivers comprehensive meeting notes within 24 hours including action items, decisions, and next steps
- Performs screen sharing and call facilitation during client meetings while Growth Strategist presents strategic recommendations

Project Administration & Coordination:

- Directly executes project setup, sprint planning, and task assignment
- Creates and maintains project documentation including SOWs, timelines, and deliverable tracking in designated systems
- Monitors project progress and updates project management tools with current status and blockers

Cross-functional Team Coordination:

- Conducts Pod standups using Agile methodology to track progress
- Creates and distributes team briefs translating client feedback into actionable tasks for specialists
- Performs liaison duties between client and delivery team, ensuring clear communication flow in both directions

⚠️ CRITICAL BOUNDARIES - What Client Success Managers Do NOT Do:

- Do NOT execute any tactical marketing work (media buying, creative development, etc.)
 - *Caveat: If a CSM has been assessed as having technical expertise in a certain field, then they may perform tactical work*
- Do NOT make strategic marketing decisions or provide strategic direction to the team
- Do NOT evaluate the technical quality of EIC deliverables
- Do NOT override Growth Strategist's strategic recommendations

These boundaries ensure clear role separation and empower each team member to excel in their area of expertise

4. SKILLSETS THE ROLE MUST MASTER

Client Relationship Architecture:

- Ability to build and maintain multi-stakeholder relationships using consultative techniques to identify expansion opportunities
- Mastery of emotional intelligence frameworks to navigate challenging conversations and maintain trust during performance fluctuations
- Ability to influence without authority, coordinating team efforts through relationship-building rather than directive power

Project Management Excellence:

- Ability to orchestrate complex multi-channel marketing projects using Agile/Scrum methodologies to maintain on-time delivery

MPI Translation & Communication:

- Ability to understand and communicate Marketing Performance Indicators (nCAC, MER, LTV)
- Capability to relay client concerns about metrics while deferring deep analysis and interpretation to the Growth Strategist
- Fluency in articulating how the Conversion Engine methodology drives client business outcomes without requiring deep technical expertise

Expectation Management & Negotiation:

- Ability to diplomatically reset expectations when performance challenges arise while maintaining client confidence
- Mastery of scope negotiation techniques to protect project margins while ensuring client satisfaction

Digital Marketing Ecosystem Knowledge:

- Ability to understand the interconnections between creative, traffic, and conversion optimization within the Conversion Engine framework

- Comprehension of D2C ecommerce fundamentals including client journey, attribution models, and platform capabilities

5. VITAL BEHAVIORS THIS ROLE MUST LIVE

Coroalling clients

- When clients present scattered priorities, reactive requests, or push for work outside of scope, you diplomatically take control by organizing their inputs, establishing clear communication cadences, and guiding them through Tier 11's proven process rather than simply executing every request as stated.
- This behavior is critical because it prevents scope creep, maintains project profitability, and ensures clients achieve their actual business outcomes rather than getting distracted by tactical rabbit holes—you are their trusted advisor who leads them to success, not an order-taker who enables their every impulse.

You Champion Proactive Communication...

- When client concerns emerge or project risks are identified, you immediately communicate to relevant stakeholders and propose solutions
- This behavior is critical because it maintains trust, prevents churn, and ensures the Pod team can adjust strategy before client satisfaction deteriorates

You Orchestrate Without Owning Strategy...

- When strategic decisions are needed, you facilitate the Growth Strategist's "puppet master" role by ensuring they have full client context while you step back from strategic direction.
- This maintains the critical boundary where the Growth Strategist owns the strategic narrative and team direction while you own the client relationship

You Transform Feedback Into Action...

- When receiving client feedback about performance or service, you immediately translate concerns into specific, actionable items for the appropriate team members and follow up on implementation, which leads to continuous improvement and client confidence
- This vital behavior directly supports Tier 11's Growth Mindset value and ensures client input drives meaningful change rather than getting lost in translation

6. SUCCESS METRICS

Metric Name	Target / Benchmark	Type	Rationale
Client Satisfaction Score (CSAT)	>90% quarterly average	Lagging Indicator (Outcome/Client Result)	Direct measure of CSM's ability to maintain positive client relationships
Issue Resolution Time	<24hrs tactical, <48hrs strategic	Leading Indicator (Service Quality)	Measures CSM effectiveness in coordinating swift solutions
Weekly GS-CSM Sync Completion	100% of scheduled syncs held	Leading Indicator (Team Alignment)	Ensures strategic alignment between client relationship and delivery

7. CUSTOMER SUCCESS MANAGER LEVELS OF COMPETENCY

Level/Title	Accountabilities	Responsibilities	Skillsets	Vital Behaviors	Account Complexity
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CSM 1 (Junior)	Contributing: Building understanding of client needs while supporting senior CSMs in maintaining relationships. Requires oversight on major decisions and escalations. Rarely serves as Delivery Lead.	Executing: Performing daily client communication tasks with guidance. Creating meeting notes and status updates with templates. Monitoring project timelines with support. Learning to identify risks. Supporting weekly GS syncs with note-taking.	Developing Core Competence: Building foundational client management skills. Learning MPI terminology. Understanding Conversion Engine basics. Developing project management capabilities with close supervision.	Learning to Adopt: Understanding importance of proactive communication. Observing how to orchestrate without owning. Beginning to translate feedback with coaching.	Simple accounts with straightforward deliverables
CSM 2 (Mid)	Consistently Delivering: Independently managing 8-10 client relationships. Ensuring satisfaction metrics are achieved. Authorized to approve minor project adjustments. Can serve as Delivery Lead for standard pods.	Managing: Independently handling all client communications. Creating comprehensive project documentation. Managing pod coordination effectively. Leading weekly GS-CSM syncs. Identifying and escalating issues promptly. Training CSM 1s on processes.	Confident Execution: Understanding MPIs enough to maintain credibility. Managing complex projects independently. Building strong multi-stakeholder relationships. Negotiating scope effectively within parameters. Influencing without authority successfully.	Exhibiting: Consistently demonstrating proactive communication. Successfully facilitating the puppet master dynamic. Effectively transforming feedback into team action. Modeling behaviors for junior team members.	Multi-channel accounts requiring cross-functional coordination

CSM 3 (Senior)	Excelling: Managing 10+ strategic accounts including Tier 11's largest clients. Influencing service delivery improvements. Authorized to make strategic recommendations for account growth. Mentoring other CSMs. Primary choice for Delivery Lead on complex pods.	Innovating: Improving client communication frameworks. Developing new project management approaches. Creating training materials. Leading client business reviews. Pioneering new ways to demonstrate value through MPIs. Optimizing GS-CSM collaboration models.	Mastering: Expert at complex stakeholder management without needing authority. Teaching MPI communication to others while maintaining boundaries. Innovating project management methods. Conducting masterful expectation negotiations. Consulting on pod structure optimization.	Role Modeling: Exemplifying gold-standard client communication. Inspiring others through flawless orchestration of the puppet master dynamic. Creating frameworks for feedback transformation. Setting the standard for client-centricity at Tier 11.	Complex accounts like requiring sophisticated coordination
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This Job Map aligns with Tier 11's pod structure where the Client Success Manager partners with Growth Strategists who own marketing strategy and Expert Individual Contributors who execute specialized tactics. The CSM ensures client success through relationship excellence, project orchestration, and expectation management—never crossing into strategic marketing ownership which belongs to the Growth Strategist role. Success depends on maintaining these clear boundaries while fostering seamless collaboration through weekly strategic syncs and proactive communication.