

Job Description- Energy Program Customer Success Manager

Position Summary

Local Technology Firm, Shifted Energy is seeking a Customer Success Manager to join our growing team and support customer participation in smart energy projects. This candidate will be an experienced professional with expertise in building relationships, providing updates to customers, and coordinating with the project team for efficient and successful implementations.

This individual will be the critical customer-facing representative of the program, while having the support from the engineering, development, and project management team members. The ideal candidate is one who has experience with customer service, is passionate about solving customer needs, has simple and effective communications skills via phone and email, and is able to set customer expectations. Additionally, this candidate should have the ability to learn new technologies and communicate those concepts to customers with varying degrees of technical expertise.

The successful candidate will play a fundamental role in participant recruitment, project implementation, technical support, and creating long-term, trusting relationships. This is a great opportunity for someone who loves technology and interacting with people in the local community, with a passion for clean energy and a sustainable future.

Responsibility & Duties

The Customer Success Manager is responsible for overseeing the process of customer recruitment, facilitating the execution of participation agreements, coordinating installation schedules with customers and project managers, and assisting customers with any questions or issues that occur after the installation has been completed. Their duties include interacting with new, existing, and potential customers on a regular basis, directing the team on how to best help customers and continuously improve the process and customer experience.

As the primary point of contact throughout the customer lifecycle, the Customer Success Manager will be tasked with developing relationships with utility customers through the project development, implementation, and verification phases. These duties include:

- Participate in the development of the participant recruitment process planning, including creating training documents, project schedules, and developing goals and metrics for success.
- Research and attend training on the technology, CRM software, contracts and participation agreements, and the installation process.
- Build relationships with property managers and home owners/occupants.
- Utilized CRM and other business systems to keep track of customer account data, participation, logging calls, and relevant notes.
- Lead customer training sessions and discussions on the program and its benefits.

- Act as a communications liaison between technical support, project management, and customers.
- Coordinate the scheduling of product installation with the customer and project management team.
- Promote customer satisfaction by setting expectations, communicating clearly, and providing any necessary followup after installation.
- Provide high-level technical and product support.
- Solicit feedback, testimonials, and opportunities for improvement from customers.

Qualifications & Skills

Candidates should be customer service and team-oriented, with a proficiency in learning new technologies and tools. This position requires self-motivation, resiliency, and the ability to effectively communicate with a diverse population of customers.

Desired skills and qualifications include:

- A strong customer service or sales background, with proven success in stakeholder understanding and management.
- Personal organization and task prioritization.
- The ability to work independently, and remain accountable for meeting goals, deadlines, and providing reporting and feedback to the team.
- A positive and persistent attitude, the ability to not become discouraged during customer recruitment.
- An existing network, or the ability to develop relationships with local property managers and developers.
- Proficient communication skills, both written and verbal, including the ability to explain fundamentals of the technology and project goals.
- Proficiency in the Google Suite of programs, including Drive, Docs, Sheets, Slides, and Meet.
- Experience with CRM Software, Scheduling, and Marketing Tools.
- A basic understanding of energy systems, and electrical utility supply/demand and billing.
- Personal commitment to sustainability, and Hawaii's clean energy future a plus.
- The ability to continuously innovate, promote efficiency, and improve processes

Compensation & Benefits

Our entrepreneurial-driven environment of ownership and execution offers team members the opportunity to contribute to a greater mission, while growing personally and professionally. You will continuously learn as part of a culture of continuous improvement, and actively contribute to making our homes and communities smarter and more sustainable.

Shifted Energy offers salary plus equity and comprehensive health care benefits.