



EMPLOYMENT SUMMARY

Position Title: Client Success Manager
Location: Milwaukee
Reports to: VP of Commercial Development
FLSA Status: Exempt
Date Prepared: 04/23/2022

OUR FOUNDATION

America has developed an unhealthy relationship with food. We over-medicate instead of eating healthy and the growth of chronic disease is out of control. Today, 70% of U.S. deaths and 85% of U.S. health expenditures are a result of chronic disease. This must change if we are to thrive as a society.

The Dohmen Company has touched nearly every aspect of the healthcare supply system over our 160+ years of business. It was clear to us that a new type of organization was needed to help drive equitable change. So, in 2018 we exited the pharmaceutical industry and in 2019 we became the first organization in the nation to transition from a for-profit S-Corp to a not-for-profit philanthropic enterprise.

Through our new Social Enterprise, we are developing the first ever food benefit to help America regain a healthy relationship with food. This will make clean eating easier, more enjoyable and – frankly – more delicious. And, while the “what” of our business has changed, our core values have and will always remain the same. You can think of this as our commitment to the market, our employees and partners:

- **Caring:** We’re empathetic and respectful.
- **Committed:** We’re dedicated and persistent.
- **Creative:** We’re inventive and imaginative.
- **Collaborative:** We’re cooperative and share our knowledge.
- **Courageous:** We’re willing to risk failure over inaction.

Our values represent the spirit of our company. They keep us grounded as we work to find the future. They define who we are, how we act and how we do business. And as a foundation owned organization focused on achieving a social return on investment (SROI), they are the essence of what makes us unique and successful.

THE POSITION:

The Client Success Manager (CSM) is responsible for the successful enablement of client and partner relationships through enrollment, onboarding, program reporting, and renewal across multiple business lines. In addition, the CSM will look for opportunities to improve external/internal experience and make recommended program enhancements.

POSITION SUCCESS FACTORS:

1. Client/partner implementations are completed on time
2. Achieve participant adoption rate of >15%
3. Participants complete enrollment at least 95% of the time
4. Client satisfaction rate of at least 90%
5. Client retention rate of at least 90%

**ESSENTIAL FUNCTIONS:**

- Create and adhere to implementation schedule for each client/partner
- Guide clients/partners and participants through successful implementation and enrollment
- Assist all involved with any questions or concerns related to implementation or about our programs
- Tirelessly promote the program within each client/partner to maximize adoption and impact
- Serve as a trusted business partner to client/partner leadership on program outcomes and reporting
- Engage client proactively in renewal discussions and secure contract renewal

KEY RESPONSIBILITIES:

- Participate in new client/partner kickoff meetings along with sales rep
- Collaborate with client/partner to create implementation project plan.
- Define enrollment process unique to each client/partner.
- Ensure all functional areas are prepared for and achieve on time completion of onboarding.
- Engage prospective participant pool to maximize enrollment/onboarding rates.
- Lead recurring client/partner status/reporting meetings.
- Update customer service with implementation status and completion of go live.
- Report implementation progress and success rates to internal leaders.
- Develop and enhance implementation supporting resources.
- Ensure timely availability of all new client/partner and participant materials and program supplies.
- Remain current on knowledge of programs and services.
- Collaborate, propose, and close client renewal
- Inform sales and operations teams of any relevant client/partner and participant feedback.

EXPECTED BEHAVIOR:

- Create a culture of program service excellence.
- Display a positive and cooperative attitude with all team members.
- Meet desired adoption and renewal goals
- Represent Dohmen Company Foundation's vision, values and capability with passion and integrity.

PERSONAL SKILLS/ATTRIBUTES:

- Bachelor's degree in business or related field
- Previous account management experience
- Previous project management experience, preferably in client implementations
- Interest in best-in-class, delicious, plant-forward food and a healthy lifestyle
- Experience in both B2B and B2C environments
- Able to engage parties new to a project/offering and get excited about the opportunity
- Excellent verbal and written communication skills
- Strong attention to detail
- Strong presentation skills and executive presence
- Proficient with computers and e-commerce software
- Team player who learns from and teaches coworkers in a respectful manner



WORKING CONDITIONS

To perform this job successfully, an individual must be able to perform each essential duty satisfactorily. Reasonable accommodations may be made to enable individuals with disabilities to perform essential functions.

The above statements describe the general nature and level of work only. They are not an exhaustive list of all required responsibilities, duties, and skills. Other duties may be added, or this summary amended at any time.

Employee Name – Print

Manager Name – Print

Signature

Date

Signature

Date