



## Position Description: Client Success Manager

### About the job:

IHA is looking for a passionate Client Success Manager to support the ongoing operations of state-wide initiatives in California including the Align. Measure. Perform (AMP) and Symphony Provider Directory Programs. Reporting to the Senior Manager of Client Success, the Client Success Manager will be responsible for the overall success of an assigned portfolio of clients. You will be involved in all aspects of client onboarding, client support, account management, business process reviews, and training. You will also guide and coach clients in their implementation of data exchange with IHA's data partners, and evaluating the business requirements to execute on delivery and implementation plans.

The ideal candidate is a highly competent, flexible, well-organized, tech-savvy, team player who has excellent project management skills and enjoys driving value in projects and programs. The Client Success Manager will be responsible for managing complexity in client onboarding but also resolution of issues. S/he must be comfortable interacting with individuals at all levels in the healthcare industry and government, must be able to take initiative to drive client value, and be able to successfully support the fast-paced work of senior-level colleagues. This is an impactful role that will make a meaningful difference within the healthcare industry. This role offers a unique opportunity to work with thought leaders across California and be a part of a smart, hard-working, and fun team.

This role will be located in our Oakland office.

### Core Job Duties and Responsibilities:

- Serve as the project manager for onboarding of new clients, providing guidance, training and ongoing support, to ensure a successful implementation and data submission process.
- Conduct and document client requirements gathering to tailor onboarding approach to meet client-specific business processes.
- Provide insights and best practices to clients to ensure full optimization and adoption of state-wide programs in California, and contribute to continually refine best practices implementation process and procedures.
- Proactively manage the client relationship throughout the entire lifecycle.
- Identify potential risks and serve as primary point of escalation for client issues; cooperatively work with internal teams and IHA leadership to expedite resolution of issues and activities, while delivering timely communication to clients on progress and next steps, through satisfactory resolution.
- Collaborate with other internal departments e.g. data operations, sales, engineering, product development, marketing, and external partners, on any relevant matter that may impact the client, and represent the client as their advocate.
- Maintain accurate client records leveraging Salesforce, and regularly provide client status updates, highlighting advocates and those at risk.

### Job Knowledge, Skills, and Work Experience:

- Bachelor's Degree in Healthcare Management, Information Technology, Business or related field
- A minimum of 3 years' experience working in health care; knowledge of California health care delivery system, network management, provider directory data, claims-based data, and/or performance measurement desired
- 3-5 years' experience in business-to-business SaaS environment in a project management, client-facing role

- Experience facilitating meetings and leading discussions with clients and other stakeholders
- Keen attention to detail, while not losing sight of the big picture
- Clear sense of priorities and objectives; ability to anticipate needs, recommend options, and implement solutions
- Flexible approach and an ability to operate effectively with uncertainty and under pressure
- Driven, self-motivated and enthusiastic with a 'can-do' attitude and the ability to think on your feet
- Excellent communication, decision-making, and problem-solving skills
- Extremely well organized with a high level of accuracy and attention to detail
- Ability to remain calm and clear-minded in a role that directly impacts both revenue and client satisfaction
- Possess a fusion of project management, business analysis, and technology
- Proficiency with CRM Software, working knowledge of Microsoft Office products

**Bonus if you have:**

- Some knowledge of Change Management methodologies and/or Business Process / Program Management
- Prior healthcare industry experience, specifically expertise/knowledge of health plans

**Benefits:**

- Competitive salary
- Great work environment in convenient locations:
- Oakland location -City Center 12th St BART Station
- Free snacks, tea, coffee,
- Subsidized gym membership
- 401K contribution
- 21 paid days off a year + 9 holidays
- Medical/dental/vision coverage
- Commuter benefits

US work authorization is a prerequisite to employment for this position.

**Please submit cover letter and resume in confidence to [jobs@iha.org](mailto:jobs@iha.org), and include "Client Success Manager" in the subject line.**

**About IHA**

The Integrated Healthcare Association is a non-profit multi-stakeholder leadership group that promotes health care quality improvement, accountability, and affordability for the benefit of all Californians. IHA members represent the most diverse and influential cross section of healthcare organizations across California. With trusted data and collaborative programs, we serve as a catalyst by forging common ground and initiating, coordinating, and managing projects that address delivery system challenges. (see Our Work). IHA was founded in 1994, has about 40 employees, and is located in downtown Oakland.