

Role	CS Operations Manager
Team	Customer Success
Reports to	Director of Customer Success
Line Manages	n/a

Background

Our Customer Success function has evolved significantly. Historically, we operated a “bookend” model – generic onboarding followed by reactive account management near renewal. While well-intentioned, this approach did not scale effectively and limited our ability to deliver consistent, proactive value across our customer base.

Following a period of consultancy, we appointed a new Director of Customer Success who has reshaped the structure and future direction of our customer organisation. Today, our model consists of:

- Customer Success Managers (CSMs) focused on higher-value accounts, working strategically with customers to define, map, and deliver against long-term goals.
- A Delivery Team made up of product and industry experts who lead onboarding and re-onboarding, run Proofs of Concept (PoCs), and provide selected consultancy hours to our largest customers.
- A Support function, primarily delivered via Intercom, providing reactive assistance across all customer segments via AI and human interaction.

To support this structure, we have introduced revenue-based customer tiers:

- Bronze: < £20k ARR
- Silver: £20k–£50k ARR
- Gold: £50k–£100k ARR

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- Platinum: £100k+ ARR

This tiering enables us to deliver a more comprehensive, high-touch service to higher-ARR customers while designing a scalable, automated model for lower-ARR segments.

Within these tiers, we have a mix of “old world” (legacy customers) and “new world” (current packages). A major team focus is moving old-world customers into new-world packages to reduce retention risk and increase long-term stickiness.

We have also invested in Planhat, our Customer Success Platform, to bring greater intelligence into how we manage customers including health scoring, NPS, lifecycle playbooks, automated triggers, and a single source of truth for customer insight and engagement. We are early in this implementation journey.

In parallel, we use our own platform internally to quality-assure customer conversations. This creates a unique opportunity to generate meaningful insight into how we engage customers, identify improvement areas, and continuously raise the standard of our customer experience – particularly within Support.

Our focus now is to embed this new service model deeply and ensure our teams are as effective and efficient as possible through smart systems, automation, and insight-led improvement.

This CS Ops role is critical to enabling us to scale our customer base without scaling headcount, while maintaining world-class customer excellence.

The Role: What You'll Own

The CS Ops Manager is a customer-led, systems-driven role with three core focus areas:

1. Designing & Running the Bronze Service Model (Automation-First)

- Design, build, and continuously improve a heavily automated service model for Bronze customers.
- Leverage Planhat, Intercom, and Walnut to create scalable onboarding, adoption, education, renewal, and churn-prevention journeys.
- Define clearly:
 - What should be automated vs escalated to humans
 - Triggers for risk, engagement, and growth
 - “Good enough” journeys that protect retention without high human cost
- Partner closely with Onboarding, Enablement, Support, and CS leadership to ensure alignment and success.
- Help create & embed a strategy for increasing revenue within this segment.

2. Driving Efficiency & Excellence Across Silver, Gold & Platinum

- Act as a force multiplier for CSMs and Delivery, enabling more time on strategic, high-impact work.
- Discover, scope, design, and maintain scalable systems and processes, including:
 - Health-scoring frameworks
 - QBR efficiency through structure, automation, and templates
 - Risk, adoption, expansion, and renewal playbooks
 - Automated alerts, workflows, and reporting
 - Repeatable, automated approaches to common CS processes
- Ensure improvements increase customer focus through better data, better insight, and better tooling – not added bureaucracy.

3. Insight, Systems & Continuous Improvement (Data-Led)

- Own and evolve a joined-up insight engine across our CS systems, ensuring data from multiple sources is clean, connected, and decision-ready.
- Be hands-on with data, not just a consumer of dashboards – validating, cleaning, joining, and sense-checking imperfect datasets across:

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- evaluagent (QA & conversation data)
- Planhat (health, lifecycle, NPS, adoption)
- HubSpot (account, renewal, and commercial data)
- Intercom (support interactions and automation signals)
- Design and maintain repeatable data flows and insight loops, not one-off analyses.
- Own our internal QA programme using evaluagent and Planhat, ensuring:
 - SLAs are met
 - Good intel is uncovered to drive meaningful change
- Create and maintain metrics frameworks, not just reports, including:
 - Health score models
 - Churn and risk drivers
 - Adoption and engagement indicators
- Translate insight into clear, prioritised recommendations for the Director of Customer Success and the wider business - spanning process, tooling, messaging, and product.
- Measure and report on the impact of changes made, closing the loop to ensure improvements are real and sustained.

Key Responsibilities

- Own and evolve the CS systems ecosystem, with Planhat as the core platform.
- Build, maintain, and optimise:
 - Health scores and risk models
 - NPS programmes
 - Lifecycle playbooks and automated communications
 - QA frameworks and insight reporting
- Support the ongoing optimisation of Intercom, particularly as AI and automation capabilities evolve.
- Ensure tools and processes enable teams rather than slow them down.
- Clearly document processes and enable adoption across CS, Delivery, Support, and the wider business.

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- Partner cross-functionally with Product, Enablement, Support, Leadership – and where needed, Sales and Partners.
- Act as a continuous improvement engine – spotting gaps/ improvements, testing solutions, and embedding what works.
- Support the Transformation Specialist with process and templates to move legacy customers into new-world packages.

What Success Looks Like

- Bronze customers are supported through a scalable, automated service model with controlled churn.
- CSMs are more effective, strategic, and consistent – able to manage larger portfolios without loss of quality.
- Clear visibility into customer health, risk, churn drivers, and growth opportunities.
- QA and churn insight leads to measurable improvements in customer experience.
- Growth and retention become predictable, data-driven outcomes.

Ideal Candidate Profile

You are someone who:

- Has proven success building scalable, efficient CS operations in a high performing or world-class CS organisation.
- Has previously worked as a CSM (ideally in tech / SaaS).
- Is innovative and comfortable with the ever changing AI landscape.
- Is comfortable owning insight and turning data into action.
- Is collaborative, pragmatic, and solutions-oriented.
- Approaches change with a positive, can-do mindset.
- Is confident challenging the status quo in pursuit of excellence.
- Enjoys documenting, enabling, and helping others succeed.
- Is a self-starter with strong curiosity and a drive to continuously improve and able to thrive in a fast-paced, dynamic environment
- Works well with others to achieve results.



- You'll be comfortable working remotely, staying connected with the team, and confident you can thrive without feeling isolated

Skills & Tooling

Core CS Systems

- Strong experience with:
 - Planhat (highly desirable)
 - Intercom
 - HubSpot
 - evaluagent (or similar QA / conversation intelligence tools – helpful but not essential)
 - BI tools/ systems
 - AI tooling

Analytics, Data & Systems Capability (Critical)

- Hands-on with data – comfortable working with messy, imperfect datasets and turning them into reliable, decision-ready insight.
- Experience cleaning, joining, and transforming data from multiple sources (e.g. CRM, CS platforms, support tools, usage data).
- Strong understanding of systems design and data architecture within a CS environment.
- Experience designing and maintaining repeatable data flows, not ad-hoc analysis.
- Comfortable working with or alongside data warehouses and ETL / ELT pipelines, or flow-based transformation tools (e.g. Snowflake or similar, Fivetran, Stitch, Tableau Prep, Alteryx).
- Proven ability to build and maintain metrics frameworks (health scores, churn drivers, adoption indicators), not just dashboards.
- Able to clearly communicate data, assumptions, and insight to non-technical stakeholders and drive action.

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Why This Role Is Special

This is a strategic role reporting directly to the Director of Customer Success, with real influence over how the customer organisation scales.

You will help define how insight, automation, and customer-centric thinking come together to deliver world-class Customer Success – sustainably and at scale for the benefit of our customers teams, wider business and of course, our customers.

If this excites and the task in hand resonates then we would love to hear from you.