



Role	Customer Success Manager (SMB)
Team	Customer Success
Reports to	Director of Customer Success
Line Manages	N/a

About the Role

As an SMB Customer Success Manager, you'll support our growing base of Bronze-tier customers ensuring they experience consistent value, adoption, and growth through scalable, efficient, and light-touch engagement.

You'll champion self-service and automation, working closely with our Enablement and Product teams to create a seamless, value-driven customer journey. This process is to build so we need someone creative, customer focused, organised and diligent to deliver.

You'll play a key role in maintaining strong retention, identifying growth signals, and continuously improving how our lower-touch segment experiences EvaluAgent.

This is a critical role in scaling our Customer Success function combining empathy and efficiency to deliver value without compromise.

Key Responsibilities

Customer Engagement & Value Delivery

- Manage a large portfolio of SMB and Bronze-tier clients through a structured, data-led and tech-enabled approach.
- Ensure customers achieve time-to-value quickly through effective onboarding and enablement resources.
- Champion the use of self-service tools, help centre resources, and automation to scale customer engagement and drive efficiency.
- Monitor customer health, usage, and adoption signals to identify risks or opportunities early.

- Deliver proactive communications and interventions that add value and strengthen retention.
- Collaborate with Enablement to continually evolve resources that support customer independence and value realisation.

Customer Journey & Risk Management

- Own the customer experience from onboarding to renewal for your tier, ensuring consistency and clarity at every touchpoint.
- Maintain strong visibility on customer health and churn risk, ensuring action plans are in place where needed.
- Identify common blockers or themes impacting SMB clients and work cross-functionally to address them.
- Surface customer insights and feedback to inform automation, playbooks, and enablement priorities.

Growth & Retention

- Identify expansion and upsell signals within your portfolio and work with Sales to progress opportunities.
- Deliver smooth renewal conversations supported by clear evidence of achieved value.
- Support retention and GRR/NRR goals through proactive, scalable engagement.

Person Specification

Skills & Experience

- 2–4 years in Customer Success within SaaS.
- Experience managing SMB or high-volume client portfolios using scalable CS models.
- Strong understanding of customer health monitoring, lifecycle automation, and value delivery frameworks.
- Excellent communication and organisational skills, able to balance efficiency with empathy.
- Confident using tools such as HubSpot, Intercom, Arrows, or similar to drive engagement and automation.
- Call centre or contact centre experience (or understanding of QA/Performance software) is highly desirable.

Behaviours

- Naturally curious and proactive; motivated to improve processes, automate, and share learnings.
- Thrives in a remote, fast-paced, agile environment, proactive in staying connected and resilient against isolation.

Performance Metrics

Retention: High GRR across Bronze-tier portfolio.

Efficiency: Increased self-service adoption and reduced manual interventions.

Value Delivery: Strong customer health and product usage signals.

Engagement: Scalable, proactive communication measured through automated workflows and digital touchpoints.

Growth: Identification of upsell opportunities and positive expansion trends