Title: Customer Success Specialist  
Reports to: Director of HomeKeeper

Department: HomeKeeper Team  
Status: Full-time, Exempt

About Us
Grounded Solutions Network is a national nonprofit dedicated to shaping communities to be inclusive and filled with opportunity for all. Where we live matters. It determines what opportunities we have and how our kids grow up. Everyone should be able to live in a place that offers opportunity: access to jobs, parks, public transit, quality schools and stable homes. Strong and inclusive communities provide the foundation that people and families need to thrive, both in the present and for future generations.

As a national membership organization, we support nonprofit and government practitioners, advocates, elected officials, and other housing professionals with the knowledge and support they need. We promote homes that remain affordable for generations and provide the foundation for our communities to be stable and strong, for good.

In order to create a vibrant workforce and fully realize the mission and vision of our organization, we are committed to fostering an organizational culture rooted in critical thinking and consciousness about race and class. We seek candidates who are dedicated to achieving racial equity. We are committed to building a staff team that is as racially and culturally diverse as the communities that we serve; candidates from all backgrounds are encouraged to apply.

All qualified applicants will receive consideration for employment without regard to race, color, religion, gender, gender identity or expression, sexual orientation, national origin, genetics, disability, age, or veteran status.

About the Position
We are looking for a Customer Success Specialist who will lead user onboarding and provide user training and support for HomeKeeper, our Salesforce app for affordable homeownership and housing counseling programs. The Customer Success Specialist will create systems and resources that will optimize the user’s experience with our app in order to increase program efficiencies and maximize impact. This is an opportunity for a self-starter to apply technical Salesforce know-how and customer success skills to advance racial equity and strengthen housing programs in diverse communities around country. We work primarily with affordable homeownership organizations and housing counseling agencies, including community land trusts, Habitat for Humanity affiliates and other community-based housing organizations.

Our current HomeKeeper team has lots of experience developing, marketing, managing and supporting our well established HomeKeeper app. We are an industry leader when it comes to helping community-based organizations leverage Salesforce to scale program management and measure impact at the local and national level. However, we are continuously expanding our features and audiences. We seek someone who can add customer success capacity and balance our team with experience working at (or with) housing counseling programs or related affordable housing organizations. We are a virtual team so, while we meet via video conference frequently, we’re looking for someone who will be personally and professionally satisfied working from a remote office.

Key Responsibilities
The Customer Success Specialist is responsible for promoting successful user adoption, retention and engagement for new and existing HomeKeeper users. In addition, the Customer Success Specialist collaborates closely with the rest of the HomeKeeper team by contributing to user support, testing new features, gathering feedback and sharing product customizations and lessons learned.

The Customer Success Specialist will dedicate approximately 30% of their time onboarding new organizations, 30% of their time on user support, retention and renewal activities; 15% of their time writing and disseminating user
communications such as user spotlights, feature summaries and best practices; 15% of their time on special projects for the team and supporting other team members who are also cross-trained; and 10% of their time collaborating with other departments or supporting internal organizational priorities. Primary responsibilities are:

- **Provide a seamless custom onboarding experience for new users**
  - Guide new users through a positive onboarding experience, conducting planning calls and web-based trainings.
  - Refine and implement systems to prepare and train a diverse user base with varying familiarity and skill.
  - Engage with users and become fluent in their history, their business outcomes, and their goals, in order to assist them in identifying the best ways to support their priorities.
  - Support organizations who are contributing data to the HomeKeeper National Data Hub, which aggregates HomeKeeper user data in order to support sector-wide research and learning.

- **Support customer success for all users**
  - Provide professional customer support by answering Tier 1 tickets. Identify issues, gather information, and resolve user issues.
  - Coordinate learning opportunities such as office hours, web-based trainings and annual in-person trainings.
  - Stay current with housing counseling sector updates and trends, to better support users of those HomeKeeper features in the short and long term.

- **Nurture a connected network of users**
  - Produce monthly e-newsletters highlighting product features, innovative customer use cases, new documentation and other resources for programs.
  - Encourage selected users to contribute more data to the HomeKeeper National Data Hub in order to support sector-wide data collection.

- **Be a strong Team Member providing support to and collaboration with colleagues**
  - Demonstrates initiative, flexibility, openness to change and accountability.
  - Bring creativity and problem-solving techniques to the work.
  - Participate on internal staff committees and support interdepartmental efforts, including our organization-wide focus on race, equity and intersectionality.
  - Help shape a positive and inclusive organizational culture amongst staff and with external stakeholders.

**Qualifications for Entry into this Position**

Our ideal candidate has experience with the Salesforce ecosystem, some knowledge or background in housing counseling or affordable housing, and experience providing technical support and/or scaling technology solutions for a diverse user base. This position is best suited to a person with excellent communication, organizational and project management skills who works well independently and as part of a team. Grounded Solutions Network will support our ideal candidate to grow their knowledge of Salesforce, HomeKeeper and the programs we support. Candidates should have a genuine interest in helping people, solving problems, and learning and applying new technologies. The ability to collaborate remotely with colleagues and customers is also critical for success in this position.

**Knowledge, skills and abilities**

- Experience with Salesforce.
- Minimum three years of related work experience. Some work experience in a related sector preferred.
- Ability to work independently in a virtual environment while coordinating a variety of projects simultaneously.
• Customer services skills and experience in providing user support, including trouble shooting, promoting best practices, and developing user documentation and trainings.
• Facility for helping others apply new technologies to work more efficiently and become a more data-driven organization.
• Experience presenting and/or coordinating trainings online for a variety of audiences and an interest in nurturing those skills.
• Experience with or willingness to learn the tools we rely on, such as WordPress, Zoom, Form Assembly, Mail Chimp, Tableau, Zendesk.com, Screensteps, Basecamp, MS Office suite of applications.

Travel required
Occasional out-of-state travel approximately 4-5 trips per year, to attend staff meetings, conferences and events.

Location
Flexible location.
Grounded Solutions Network has two primary office locations in Oakland, CA and Washington, DC, with additional staff working from home or co-working spaces throughout the contiguous 48 states. Other remote locations with direct local access to a major airport will also be considered. All staff are expected to demonstrate the ability to work remotely while maintaining high levels of efficiency and productivity and communicating effectively with their direct supervisor and colleagues.

Starting Salary Range
$56,000-62,000 annually, commensurate with experience.

Join our team and build your career with us! We offer:
• Supportive, stimulating and collaborative environment with passionate colleagues dedicated to building community and equity.
• Opportunities for professional growth and development.
• Competitive, comprehensive benefits package including health, dental, matching 401k and paid time off.

Work Environment/Physical Demands
The work environment characteristics described here are representative of those an employee encounters while performing the essential functions of this job. The physical demands described here are representative of those that must be met by an employee to successfully perform the essential functions of this job. Reasonable accommodations may be made to enable individuals with disabilities to perform the essential functions. All employees are responsible for a clean and safe work area. While performing the duties of this job, the employee is regularly required to sit, and occasionally required to stand and walk. The noise level in the work environment is usually quiet.

How to Apply
Please submit, as 1 document (PDF or Word), a cover letter with salary requirements, resume, and responses to two (2) supplemental questions. Please limit each response to 200 words:
• Describe a time you helped someone resolve an issue or supported them to reach a goal.
• You've received the following inquiry, “I’m Casey, can you please help me reset my password?” Respond to Casey by sharing instructions for resetting a password for a website you regularly use.

Submit documents to: https://bit.ly/2Z1M4cY

Interviews will be conducted on a rolling basis.