SPITFIRE INBOUND (PTY) LTD

SPITFIRE CRM ONBOARDING SPECIALIST ROLE JOB DESCRIPTION

REPORTS TO: HEAD OF ONBOARDING

JOB DESCRIPTION

ROLE PURPOSE:

The CRM Onboarding Specialist is responsible for guiding clients through a seamless onboarding experience, ensuring they gain full value from their HubSpot (or other CRM) investment. This role involves working closely with clients and internal teams to deliver training, basic technical support, and HubSpot (or other CRMs) setup tailored to each client's specific needs and objectives. The CRM Onboarding Specialist will play a key role in enabling client success, supporting change management efforts, and optimising CRM functionality to achieve desired business outcomes.

ROLE TASKS & RESPONSIBILITIES:

Client Onboarding
- Conduct thorough assessments of client needs and existing systems, developing tailored onboarding strategies that align with client expectations and objectives.
- Lead the end-to-end HubSpot onboarding process for clients including, implementing and managing the onboarding process, change management process for the client, and seamless transition to HubSpot (or other CRM).
- Collaborate with clients during the onboarding period to ensure optimal setup for both long and short-term goals.

Client Training and Support
- Design and deliver comprehensive training sessions for clients on the use of HubSpot and other relevant tools, ensuring that users are equipped with the necessary knowledge and skills to leverage the platforms effectively.

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- Provide ongoing support and consultancy to clients through-out the onboarding period, addressing their queries and concerns promptly to enhance user satisfaction and promote successful tool adoption.
- Develop documentation and resources to facilitate self-learning among clients and team members, ensuring they have access to valuable information and guidance.

Client Success Management
- Offer strategic guidance to clients to assist in achieving their specific KPIs, proactively identifying areas for improvement and providing recommendations for optimisation.
- Maintain regular communication with clients to gather feedback, assess satisfaction levels, and make necessary adjustments to the onboarding process and ongoing support.
- Foster strong relationships with clients, acting as their primary point of contact and advocate within the organisation to ensure their needs are met.

Collaboration with Internal Teams
- Collaborate closely with the sales, marketing, and inbound success teams to ensure alignment of strategies and execution plans, promoting a cohesive approach to client engagement.
- Act as a liaison between clients and various internal departments, facilitating effective communication and ensuring all parties are informed and aligned on project objectives.
- Support team members and stakeholders in understanding client requirements and expectations to enhance service delivery and project outcomes.

Reporting and Data Analysis
- Collect and analyse data related to client performance and onboarding processes, providing insights and reports to the Head of Onboarding to inform decision-making and strategy adjustments.
- Use tools such as HubSpot track custom satisfaction metrics and offer feedback to internal teams for further optimisation.
- Participate in the development of reporting frameworks and dashboards that visualise client performance, aiding in strategic discussions and planning.

Continuous Learning and Improvement
- Achieve and maintain key required HubSpot certifications
- Stay updated on industry trends, best practices, and new tools that can enhance client onboarding and data analysis processes, ensuring the organisation remains competitive.
- Actively seek feedback from clients and team members to identify areas for improvement in onboarding and CRM strategies, implementing changes as necessary.
- Engage in professional development opportunities to advance skills in data analysis and reporting, aligning personal growth with organisational needs.

TECHNICAL SKILLS:

- Proficient and experience with using HubSpot or other CRM tools
- Proficient in project management and collaboration tools such as Google Workspace, and Teamwork for effective communication and workflow management.
- Knowledgeable in onboarding processes and content creation for training purposes.

- Familiar with multimedia design principles, enhancing the creation of engaging training materials and resources.
- Training facilitation

BEHAVIOURAL COMPETENCIES REQUIRED:

Critical
- Interacting with People
- Examining Information
- Providing Insights
- Developing Strategies
- Managing Tasks
- Taking Action
- Articulating Information

Important
- Developing Expertise
- Inviting Feedback
- Interpreting Data
- Checking Details
- Valuing Individuals

We value our employees and go the extra mile to make sure you receive a learning experience that fits your career goals. You will become extremely knowledgeable in online communication and understanding online marketing and business development in a fast-paced and exciting setting. You will also learn how to work in a professional environment and have ample opportunity to network with department leaders and other professionals throughout the company and industry.