



Title: Customer Success Specialist

Reports To: Director of Research Products

Job Summary

The focus of this position is to provide Vestigo clients with an exceptional experience during the onboarding/implementation process. The Customer Success Specialist will play a key role in ensuring that new Vestigo clients are fully trained in the use of our software and are poised for success post “go live.”

In addition to the focused responsibilities associated with client onboarding/implementation and training the person in this role will also collaborate with a cross-functional team to make sure our products meet or exceed our clients’ expectations by providing input into the product development and testing process and assisting with help desk tasks, participating in external communications.

Summary of Essential Job Functions

Client Onboarding, Implementation, Education and Training

- Provide client onboarding/implementations and training for all new Research Product clients
- Assist in the creation and maintenance of all user documentation to support the successful onboarding/implementation of the research products by all user types
- Assist with the implementation and training of Vestigo clients installing interfaces and integrations
- Maintain a high standard of responsiveness, ensuring high levels of client satisfaction with their onboarding/implementation experience
- Support the entire Research Products team to ensure a seamless customer experience for all clients
- Travel to represent the Research Product business unit for client implementation/go live events and site visits
- Participate in sales and marketing events as needed

Client Support and Communications

- Provide technical support for existing clients using established company processes and tools (Kayako, Help Center, CRM, phone, email)
- Assist where needed with the Vestigo Virtual Classroom





- Develop and maintain subject matter expertise in Research Pharmacy by participating in educational opportunities, reading professional publications, maintaining professional networks, and participating in professional organizations
- Maintain a high standard of responsiveness, ensuring high levels of client satisfaction with our support experience
- In collaboration with the Director of Research Product and Research Pharmacy Team consult with clients on best practices, existing and novel uses of software features
- Provide guidance and feedback on all client and prospect communications, such as the MGI website, newsletters, training and sales and marketing materials

Account Management

- Work with Account Manager(s) to provide high level support and consultation to Research Product clients to optimize their use of software features, optimizing workflows to meet regulatory standards based on product knowledge and subject matter expertise
- Collaborate and assist with the monitoring and analyzing of customers' usage of our product, report on trends to management, provide suggestions based on findings
- Collaborate and assist in maintaining a library of best practices based on client interactions and subject matter expertise in collaboration with the other research products team members

Product Development and Testing

- Work with the Research Pharmacy Team and the Development Team on all open issues relating to research product based on feedback provided by Research Product Team members
- Provide recommendations to the Director of Research Products relating to the direction of Research Products based on client feedback and interactions
- Translate enhancement requests into high-level specs to design company's products as assigned
- Assist with testing of research product releases and new features in collaboration with the Research Products Team

Other Duties

- Perform other duties as needed





Required Skills, Education and Experience

- Experience with the Vestigo application
- Subject matter expertise in research pharmacy (Investigational Drug Services) at clinical sites. (At a minimum 2 years of relevant experience required).
- Demonstrated superior implementation/training skills
- Ability to provide instructional material remotely using company provided MS Team platform
- Quick learner, eager to embrace new skills and technologies
- Advanced user of Word, Excel and PowerPoint
- Excellent organizational skills with ability to work independently and manage projects with many moving parts
- Ability to perform duties in an efficient, professional, and courteous manner
- Excellent written and verbal communication skills
- Must be eligible to work in the U.S.

Desired Skills and Experience

- Certified Pharmacy Technician (CPhT)
- Previous experience conducting software training / implementation

About Us:

The McCreadie Group is an award-winning, dynamic software company delivering market leading solutions in the pharmacy education and research pharmacy markets. We are passionate about providing superior experiences for those we work with – both through our technology and through our people. We offer a competitive salary and benefits, a casual work environment, and the ability to work remotely.

