Smartly

Position Description	
Job title:	Customer Relationship Manager
Location:	Head Office, Lower Hutt
Reporting to:	Service Delivery Lead
Direct Reports	Nil
Date:	August 2025

Purpose

At Smartly, the customer experience is at the heart of everything we do. This role plays a key part in turning new sales into long-term success by ensuring customers are onboarded quickly, confidently, and compliantly. Through great discovery, proactive communication, and effective coordination, our Customer Relationship Managers help clients realise the full value of their payroll solution from day one.

As the central point of contact for each client's implementation, you'll coordinate task completion across multiple internal teams to ensure a smooth and timely onboarding journey.

This is a busy, fast-paced, high-volume role where no two days are the same. You'll manage a portfolio of customers who are all at different stages of onboarding. To succeed, you'll need exceptional multitasking skills, strong attention to detail, and the ability to work confidently across systems and processes.

Communication is everything. You'll need to explain payroll concepts clearly, guide customers through setup, and keep things moving, even when they're busy or overwhelmed. Payroll combines maths and legislation, so you'll need to be comfortable with numbers and compliance, while building trust with your clients and keeping things on track.

The Customer Relationship Manager is responsible for managing customer relationships with new Smartly customers from the point of sale through to being fully integrated with their destination product and service suite. They are accountable for high-volume customer contact, ensuring all clients are proactively engaged at the right time, through the right communication channel, to maximise conversion.

They assist customers to self-serve their implementations, guide them through configuring their product solution, troubleshoot roadblocks, and provide compliance oversight to help them reach go-live as efficiently as possible.

Result area	Activities
Relationship Management	• Proactively contacting customers through phone, email and pre-booked video calls to progress the implementation process. • Guiding customers through the Smartly software, assisting them to self-serve their implementations to the greatest extent appropriate. • Using a consultative approach to discovery, ensuring customer requirements and potential blockers are identified. • Troubleshooting issues with clients, handling objections and ensuring stakeholders are satisfied with proposed solutions. • Immediately addressing complaints, understanding customer pain points, addressing concerns, and gaining commitment to move to a positive next step. • Identifying and executing on opportunities for upsell and cross-sell during implementation, working with sales to maximise revenue on new accounts.

	• Supporting sales and Account Management in pre-sales activities including client meetings and creation of proposals as required. • Helping to promote and maintain a positive company image.
Service Delivery	• Providing high quality service delivery to Smartly customers for the effective, efficient and accurate implementation of software solutions. • Acting as the conduit between customers and members of Smartly teams to ensure solutions delivered meet the customer's business needs and challenges in a timely manner. • Problem solving customer implementation issues or concerns. • Ensuring compliance is maintained in the delivery of software solutions and managed services. • Collaborating with the sales team to ensure delivery of solutions within SLAs. • Creating implementation plans for Smartly customers' software implementations. • Assisting customers to understand their legal obligations and the compliance implications of their choices during implementation. • Troubleshooting potential or realised implementation errors to resolve customer concerns.
Stakeholder Engagement	• Building strong rapport with a diverse range of stakeholders leveraging these relationships to expedite implementation time to value. • Managing relationships between project delivery resources including L&D, Professional Services, Sales, Partner Success, Key Accounts, Managed Services & Customer Support. • Working collaboratively with other stakeholders to resolve client business and or technical issues. • Influencing other teams to improve the overall customer experience and implementation speed to market.
Other duties	• Carry out other duties as requested.
Health & Safety	• Report all hazards or unsafe situations • Report all accidents/incidents including near misses • Work safely and use all protective equipment if required

Experience and qualifications

- At least 2 years' experience in service delivery or relationship management.
- Strong customer focus, emotional intelligence and business acumen.
- Ability to deal with a wide variety of stakeholders and translate client needs into a complete solution.
- Confident communicator, able to explain technical, mathematical or compliance concepts in a clear and approachable way.
- Proven ability to multitask and thrive under pressure while managing a portfolio of clients at different stages of onboarding.
- Ability to capture information succinctly and accurately.
- Ability to work collaboratively within a team.
- Well-developed oral, written, and interpersonal skills.
- Effective work organisation and prioritisation skills with an ability to manage a wide variety of tasks.
- Advanced proficiency with MS Office Applications and other relevant business software.
- In-depth knowledge of customer services software, databases and CRM systems.
- Ability to work on complex issues where analysis of situations or data requires evaluation of variable factors.
- Ability to network and develop productive relationships with customers, stakeholders and suppliers.
- Proven negotiating skills with the aptitude to ensure win/win situations for all parties.
- Tertiary qualification in relevant discipline.

Key competencies

- Adaptability to change (as well as being a change agent) and ability to thrive in a constantly changing environment.
- Proven ability to influence across teams and lead by example.
- Confidence to take ownership of decisions and escalate only when appropriate.
- Results oriented.
- Strong decision-making skills.
- Excellent customer service ethos.
- Demonstrates strong initiative & comfortable with a high level of autonomy.
- Ability to hold others accountable to tasks and deadlines.
- Ability to manage multiple priorities and stay focused in a high-pressure environment.
- Comfortable navigating complexity across systems, stakeholders, and regulations.