



M365 Customer Success Specialist

Reports to: Craig Taylor

Main Duties and Responsibilities

FastTrack Administration

- Onboard eligible organisations to the FastTrack Orchestration Portal (FTOP);
- Act as point of contact for sales and operations to Microsoft FastTrack Partner Manager and Phoenix account managers;
- Provide regular reporting and updates on active use and project activities to M365 Customers Success Lead and FastTrack Partner Manager;
- Proactively monitor FastTrack Ready funding and ensure Phoenix maximise rebates associated with FastTrack Ready;
- Work collaboratively with Microsoft Solutions and Cloud Solutions team in identification of FastTrack Ready opportunities and ongoing management of customer relationship;
- Manage CPOR and TPOR assignment process via partner centre and provide regular reporting of CPOR/TPOR fees;
- Deal with customer queries around FastTrack

Microsoft Funding and Incentives Administration

- Understand and take ownership of the Funding opportunities from Microsoft.
- Act as point of contact for sales around Microsoft Funding that is available
- Assist with POE and ensuring funding opportunities are submitted on time and accurately
- Support monitoring of funding that Phoenix is due to receive, own a pipeline and ensure funding is received when expected at the amount expected
- Work collaboratively with Microsoft Solutions and Cloud Solutions team in identification of funding opportunities and ongoing management of customer relationship;
- Form part of the CPOR and TPOR assignment process via partner centre and provide regular reporting of CPOR/TPOR fees;
- Deal with Phoenix sales and customer queries around Funding requirements
- Support Phoenix marketing team with funding requests and tracking for programmes such as Cloud Accelerator

Other

- Align relevant Phoenix solution offerings to customers based on their active use/consumption profile.
- Support the development of Customer Success Plans and Adoption and Change Management Plans
- Ensure that all company procedures and processes are followed; and
- Any other reasonable request.

Experience Required

- Excellent all-round knowledge of commercials, and experience of interacting with sales
- Be comfortable in providing telephone and virtual calls and recommendations to customers;
- Experience working with in a role that includes customer facing training, customer success and change management

- Able to prioritise work under pressure and use initiative to ensure that deadlines are met.

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