



Customer Success Consultant (Technical Trainer)

**Job Description for Full-Time and Part-Time Positions
Based out of Hillsboro, Oregon Office or Working Remotely
Reports to: Learning and Development Manager**

About First Insight:

First Insight builds optometry and ophthalmology software solutions that make patient care easier. Our solutions are an extension of our culture. They eliminate barriers and make workflow easier, so our customers have more quality time with their patients and in their own lives.

At First Insight, we work hard to create an environment where employees can explore new ideas, connect directly to customers for insight and see real change emerge. It's about collaboration, inspiration and the energy that comes from the right balance of life and work.

Summary:

The Customer Success Consultant (CSC) acts as an account manager for new customers. Our ultimate goal is to guide their product deployment process from contract signing through six months beyond Go Live.

The CSC is also primarily a technical trainer, for both new and existing customers, instructing customers on how to use and customize the MaximEyes electronic health records (EHR) and practice management system (PMS), as well as reviewing workflows to guide the customer on how to improve office efficiency.

A successful candidate will be technically savvy (able to grasp technical concepts of web-based EHR and PMS software and integration quickly), be an excellent communicator, possess the ability to effectively transfer knowledge in a consultative manner, be customer-focused and operate with a sense of urgency.



Responsibilities:

- **Account Manager for New Customers:** Guide clients through the deployment and training process beyond Go Live, and ensure a successful implementation.
- **Technical Training:** Conduct training (predominantly virtual) and ensure successful customer adoption of MaximEyes features.
- **Training Materials:** Develop and update training materials, such as how-to documents, guides, FAQs, webinars, videos, etc.
- **Product Demonstrations:** Assist the sales team and provide product demonstrations for customers and sales prospects via online demos and at industry trade shows.
- **Feedback to Engineering and Product Specialists:** Provide feedback about product features and customer use.
- **Escalated Clients:** Work with clients for retention and/or increase customer satisfaction.

Required Skills and Qualifications:

- 2+ years of technical training experience with an ability to train, evaluate, and collaborate effectively with others
- 1+ years of experience working with optometry, ophthalmology, optical, and eye care industry partners and practices
- Strong medical billing and insurance knowledge
- Strong customer relations, written and verbal communication skills
- Ability to problem-solve issues
- Expert knowledge with Microsoft Office (Word, Excel, and PowerPoint) and Google Suite (Docs, Sheets, and Slides)
- Strong written/oral communication and interpersonal and problem-solving skills
- Ability to work effectively, efficiently, and independently in a fast-paced environment and motivated to achieve outstanding results
- Ability to prioritize multiple projects and respond to changing priorities based on deadlines and requests

Preferred Skills and Qualifications:

- Experience using or administering a Digital Adoption Platform recommended
- Troubleshooting and technical support experience recommended
- 1+ years of experience using practice management and EHR software recommended