

Position Title: Client Success Manager (CSM)
Job Type: Full-Time
Location: Remote
Reports to: Executive Vice President, Operations

About InStep Health:

Instep Health is a leader in healthcare marketing with 20+ years of experience delivering impactful campaigns for pharmaceutical and OTC brands. We connect health-focused brands to millions of consumers and the healthcare providers who treat them, ensuring engagement at pivotal moments in their decision-making process.

Our proprietary messaging and analytics platform integrates exclusive retail and doctor office networks with advanced digital tools and analytics to create seamless connections between brands and their audiences. By targeting consumers actively searching for treatment options, we amplify the influence of healthcare provider recommendations to guide purchase and treatment decisions.

InStep Health uses a combination of first-party exposure data and third-party healthcare claims to analyze and optimize campaign delivery. This ensures brands are positioned within the patient treatment journey across targeted stakeholders within all relevant activation channels, maximizing impact and relevance.

Position Summary:

The Client Success Manager is a multi-functional position that plays a critical role within our fast-paced sales support team, with a focus on supporting sellers with pre-sale through post-campaign activities. This role requires client-facing communication and collaboration with key stakeholders across our company to deliver successful campaigns to clients. The ability to quickly absorb and retain knowledge of our products and processes, and to operate effectively across multiple teams, platforms and initiatives simultaneously, are critical to achieving success in this role.

Key Position Responsibilities:

- Assume ownership of on-time client RfP response completion, supporting sellers in populating client templates including use of internal and external systems necessary for completion.
- Assist sales team members with the development and preparation of client PowerPoint presentations.
- Create and maintain client RfP and pre/post-campaign launch trackers.
- Develop an understanding of client campaign goals and successfully translate objectives into clear direction for internal teams.
- Manage all internal and external communications for campaign launches, delivering information in a clear, concise, and actionable format.
- Track and manage client deliverables with internal teams before, during and after campaigns.

Additional Responsibilities:

- Ability to work effectively both independently and collaboratively within a team environment, demonstrating accountability, adaptability, and clear communication to achieve shared goals.
- Possess strong knowledge of company products and independently address client inquiries.
- Leverage critical thinking abilities to assess information, question assumptions, and drive thoughtful decision-making.
- Demonstrate initiative by proactively identifying opportunities for improvement, addressing challenges independently, and taking ownership of tasks to drive successful outcomes.

Candidate Qualifications:

- Bachelor's Degree, 2+ years of experience in digital media, sales support, or a related field; healthcare industry and/or agency experience preferred.
- Demonstrated ability to produce clear, concise, and professional business communications.
- Strong attention to detail with the ability to maintain a high level of accuracy.
- Exceptional organizational skills with the ability to manage competing priorities, adapt to changing demands, and consistently meet deadlines.
- Flexibility to adjust work schedule as needed and a willingness to take initiative to ensure tasks and responsibilities are completed successfully.
- Proficiency with Microsoft 365 (Outlook/Teams, PowerPoint, Excel) and experience working in CRM and workflow/project management tools (e.g., HubSpot, Jira). Comfortable learning internal proposal/pricing tools and campaign tracking systems; familiarity with SharePoint/OneDrive document management is a plus.
- Willingness and ability to travel domestically for approximately 2-4 overnight trips per year, with potential additional travel as business needs require. Candidates are expected to travel to our New York City office as needed for team meetings.

Work Location/Arrangement:

This position is fully remote, allowing employees to work from a home office or approved location. Candidates are expected to maintain a reliable workspace, demonstrate strong self-management skills, and adhere to all company policies related to remote work, communication, and performance expectations.

Why Join InStep Health:

- Join a mission-driven company at the forefront of revolutionizing healthcare.
- Opportunity to make a tangible impact on healthcare outcomes and patient well-being.
- Competitive compensation package and benefits.
- We live our values of collaboration, respect, diplomacy, humility, curiosity, adaptability, and noble intent, bringing deep trust and high expectations to how we work with each other and our clients.

Compensation:

We are committed to promoting pay transparency and equity in our workplace. The anticipated salary range for this position is \$80k-\$100k/year based on factors such as education, experience, skills, certifications, seniority, location, etc. Final compensation will be determined through discussions during the hiring process and may vary as determined by InStep Health. This position also includes eligibility for an annual bonus, determined by both company performance and individual contributions.

In addition to base pay, we offer a comprehensive benefits package, which includes health insurance, retirement savings plans, paid time off, life insurance, short- and long-term disability insurance, paid parental leave and professional development. Send a resume and cover letter to Talent@instephealth.com, and state the position in your email message.