



## VP Customer Success

### **About OptiFunder**

OptiFunder is a leading provider of SaaS cloud technology to the residential mortgage finance industry and pioneer of the Warehouse Lending Management System for mortgage originators.

We provide a portfolio of technology solutions to help lenders originate more loans, reduce origination costs, and increase operational efficiency across the mortgage lifecycle. By joining OptiFunder, you'll become part of a forward-thinking company that is transforming the way our customers embrace technology to enhance their business and the bottom line.

One of the fastest growing fintech companies, we offer the excitement of a rapidly growing technology disruptor with the stability of a seasoned management team and some of the brightest minds in mortgage banking and best talent around. Visit [www.optifunder.com](http://www.optifunder.com) to learn more.

### **Job Description**

The Vice President of Customer Success is a key senior executive responsible for ensuring customers achieve their desired outcomes and realize maximum value from our services. This role demands a visionary leader with deep expertise in account management, customer success, and organizational scaling, particularly in SaaS environments. The ideal candidate will develop and execute strategies to drive customer satisfaction, retention, and growth while fostering strong client relationships and a high-performing team culture.

### **Key Responsibilities**

- **Customer Advocacy and Relationship Management**
  - Build and maintain executive-level relationships with key clients, ensuring a thorough understanding of their business goals and challenges.
  - Proactively identify and address customer needs. Act as the escalation point for resolving complex customer issues and client liaison to internal company departments.
  - Collaborate with different departments to ensure seamless service delivery and exceptional customer experience.
- **Strategic Growth and Value Realization**
  - Develop and implement strategies to drive customer adoption, retention, and revenue growth across multiple product lines.
  - Identify and capitalize on opportunities for upsell and cross-sell in alignment with customer needs and company goals.
- **Operational Excellence**
  - Define and enhance the customer lifecycle, implementing best practices to ensure long-term success.
  - Establish operational metrics, health scores, and early warning systems to proactively manage at-risk accounts.
  - Introduce scalable processes and tools to optimize team efficiency and effectiveness.

- **Cross-Functional Leadership**
  - Serve as the primary liaison between customers and internal teams, aligning customer success initiatives with company priorities.
  - Collaborate with Product, Sales, Marketing, Professional Services, and Support teams to enhance customer outcomes.
- **Team Leadership and Culture Building**
  - Lead and mentor a high-performing Customer Success team, fostering a culture of accountability, innovation, and customer-centricity.
  - Provide regular feedback and development opportunities to team members, ensuring alignment with company values and goals.

### **Requirements**

- Proven track record of scaling customer success organizations in a SaaS environment.
- Extensive experience in account management, customer success, and change management.
- Strong executive presence and exceptional relationship-building skills.
- Demonstrated ability to develop and execute strategies for retention, revenue growth, and adoption.
- Expertise in designing and implementing customer success metrics, health scores, and proactive risk management frameworks.

This role is integral to our company's success, bridging the gap between our customers' needs and our strategic objectives. The position offers the opportunity to work in a remote-first environment with competitive compensation, flexible schedules, and benefits like unlimited PTO, healthcare, and 401(k). If you're a transformative leader passionate about customer outcomes and organizational growth, we'd love to hear from you.