

<b>Title:</b>	Head of In-Form Customer Success
<b>Contract type:</b>	Permanent
<b>Location:</b>	Hybrid (London Head Office 2 days per week) or Remote
<b>Starting Salary:</b>	£66,955.00 ( <i>pay award pending</i> )
<b>Closing Date:</b>	10am Monday 30 <sup>th</sup> March 2026
<b>Interview Date:</b>	7 <sup>th</sup> April 2026

## 1. Introduction

Thank you for your interest in this post. This pack will give you some more information about the role and how you can apply. Please feel free to contact us if anything is not clear or you have further questions.

The post of Head of In-Form Customer Success is a new role within Homeless Link that represents an investment in how we engage and support the over 350 customers of our In-Form case management system. The postholder will be responsible for customer renewals, customer reviews, training, user forums and the annual customer survey. They will manage a small team of Salesforce technical consultants, trainers and Customer Success managers.

This exciting new role is a chance to help the homelessness sector make the most effective use of their In-Form systems help us achieve our shared vision to end homelessness in this country.

We are actively seeking to increase diversity within our organisation and would greatly welcome applications from people with lived experience of homelessness, from a black or minority ethnic background and/or with a disability.

Thank you for your interest, and I look forward to receiving your application.

Matt Harrison  
Deputy CEO

## 2. Job Profile

### ROLE PURPOSE

- The Head of In-Form Customer Success is responsible for maximising customer retention, satisfaction, and lifetime value across the In-Form customer base.
- The postholder will lead the customer success function at In-Form, ensuring structured onboarding, adoption, renewal, and expansion processes that support sustainable growth of the product portfolio.
- The role combines operational leadership, commercial accountability, and strategic development of customer experience within a Salesforce-based SaaS environment.
- The postholder will line-manage a small team of commercial and technical staff who will work directly with customers.

### Accountability

The Head of In-Form Customer Success reports to the Director of In-Form.

### Location

We are flexible about the location of this post.

Hybrid staff are required to attend the office for a minimum of 2 days a week.

Remote staff can work from home full time.

However, regular travel may be required across the UK, including frequent attendance at Homeless Link's offices in central London.

### MAIN RESPONSIBILITIES

#### Customer Success Strategy

- Define and implement a scalable customer success model appropriate to product maturity and customer mix
- Segment customer base (eg. by edition, size and sector)
- Define engagement cadence
- Develop customer journey mapping from onboarding to renewal

#### Customer Retention

- Own gross and net revenue retention metrics
- Develop and execute renewal strategy
- Manage the renewals and invoicing process
- Identify and mitigate at-risk accounts
- Deliver structured renewal forecasting and pipeline visibility

## **Team Leadership**

- Lead and develop the Customer Success team (CSMs / trainers / technical consultants as applicable)
- Set performance targets aligned to retention and expansion
- Establish KPIs and reporting dashboards

## **Onboarding and Adoption**

- Ensure structured onboarding processes are documented and consistently applied
- Work with the implementation team to reduce time-to-value for new customers
- Monitor product adoption metrics
- Manage the training strategy for new and existing customers
- Identify upsell and cross-sell opportunities aligned to customer needs

## **Commercial Growth and Expansion**

- Work with Business Development to support expansion revenue
- Identify growth opportunities within existing accounts
- Support pricing, packaging, and contract strategy from a customer insight perspective

## **Voice of the Customer**

- Capture structured customer feedback through informal and formal processes
- Run the annual Customer Survey
- Organise the In-Form User Hubs
- Feed insights into product roadmap discussions
- Work closely with the Product team to prioritise improvements

## **Customer Risk and Escalation Management**

- Own high-risk and escalated accounts
- Ensure structured resolution processes
- Maintain executive-level relationships for strategic customers

## **Reporting and Governance**

- Report regularly on:
  - Churn rate
  - Net revenue retention
  - Customer health scores
  - Onboarding performance
  - Customer satisfaction metrics

- Provide data-led insights to senior leadership

### GENERAL

- Roles and objectives in Homeless Link may change. All members of staff are expected to be prepared to work flexibly in response to changing business needs.
- All members of staff are expected to undertake any other responsibilities or tasks that are consistent with their role and/or reasonably required by the Chief Executive.
- All members of staff are required to operate in accordance with Homeless Link's values, policies, and procedures.

*This is a description of the job as it is presently constituted. It is the practice of Homeless Link to examine job descriptions from time to time and to update them to ensure they relate to the job as then being performed, or to incorporate whatever changes are required to reflect business needs. This will be conducted in consultation with you. It is the organisation's aim to reach agreement on changes, but if agreement is not possible, the organisation reserves the right to insist on changes to your job description, after consultation with you.*

## PERSON SPECIFICATION

### Qualifications, Experience and Specialist Knowledge for the role

#### Essential

- Senior customer success leadership experience within SaaS or technology services
- Direct accountability for revenue retention in a subscription model
- Experience managing mid-sized customer portfolios (£1m–£10m ARR range)
- Experience working with CRM or case management platforms
- Track record of reducing churn and increasing customer lifetime value
- Experience leading and developing a customer-facing team.
- Excellent IT skills including use of spreadsheets and other relevant tools.
- Excellent writing skills and ability to adapt tone and content to a variety of different audiences
- Able to conduct meetings with staff at all levels from frontline staff to senior charity leaders and partners in other sectors
- Experience of managing budgets and budget planning.

#### Desirable

- Experience of working in a charity, public sector, or purpose-led organisation.
- Familiarity with the Salesforce platform and ecosystem
- Experience scaling customer success in a growing SaaS product
- Exposure to pricing strategy and commercial modelling
- Experience of presenting at conferences and events
- Database and data visualisation skills

### General requirements for roles at Homeless Link

#### Essential

- Willingness and ability to work outside normal office hours.
- Willingness and ability to operate in accordance with the values and policies of Homeless Link.
- Willingness and ability to work flexibly in response to changing organisational requirements.
- Commitment to bring into the work the views, needs and voices of people with direct experience of homelessness.

#### Desirable

- A sound understanding of the causes, consequences and solutions to homelessness based on direct experience.

## KEY COMPETENCIES

### Summary of Core Competencies

<p><b>Personal Contribution</b></p> <p><b>Personal Effectiveness:</b> Demonstrating effective working practices, striving to deliver high performance</p> <p><b>Effective Communication:</b> Demonstrates ability to communicate concisely, accurately and persuasively verbally and in writing with a range of audiences</p>	<p><b>Working with Others</b></p> <p><b>Teamwork:</b> Working cooperatively, building and nurturing strong relationships within and outside the organisation.</p> <p><b>Stakeholder Focus:</b> Identifying, understanding and striving to exceed the needs of all stakeholders.</p>	<p><b>Organisational Contribution</b></p> <p><b>Resource and Project Management:</b> Achieving results through efficient and effective management of projects and resources.</p> <p><b>Entrepreneurial and Innovative Thinking:</b> Generating and developing imaginative and innovative solutions and opportunities.</p>
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### Role or Grade specific competencies

<p><b>Expert/Technical Knowledge:</b> Demonstrating best use of required knowledge in specified field ensuring continuous learning and development.</p>	<p><b>People Management &amp; Development:</b> Actively leading and creating an environment to enable individuals to achieve their maximum potential.</p> <p><b>Strategic Leadership:</b> Developing and articulating the future direction.</p>	<p><b>Business &amp; Commercial Acumen:</b> Demonstrates understanding of the commercial environment, identifying and developing business opportunities.</p>
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## EXPLANATION OF TERMS USED

- **Role description:** gives details of the duties of the post. Use this as a guide to decide whether you think the job would suit you.
- **Person specification:** lists the criteria, which will be used to assess your application and covers the qualifications, specialist knowledge, experience, and track record that we are looking for.
- **Key competencies:** these are for your information. We will look for evidence of all these during the interview and testing stage if you are shortlisted.

## Employee Benefits

Salary Scales for Head of In-Form Customer Success

Hybrid: £66,955 - £74,445

It is our policy to appoint at the first point of the salary scale.

[Follow this link for further information on working for Homeless Link.](#)

### 3. How to apply

#### **Sending in your application**

Please provide your CV with a covering letter explaining how you meet the requirements for the role in the person specification and email to:

[recruitment@homelesslink.org.uk](mailto:recruitment@homelesslink.org.uk).

We would also appreciate it if you would complete our online [EDI monitoring form](#), the information provided is not shared with the panel, but does really help us monitor the effectiveness of our selection procedures in relation to our EDI strategy

The closing date is 10am, Monday 30th March 2026. Applications received after the published closing date will not be considered.

We plan to hold interviews on Tuesday 7<sup>th</sup> April 2026, in-person in our London Head Office.

For any queries about the post, please email [recruitment@homelesslink.org.uk](mailto:recruitment@homelesslink.org.uk)

#### **Supporting people with disabilities**

Homeless Link is committed to improving its employment opportunities for people with disabilities. Please let us know if you require support, modifications, adjustments, or special equipment to assist you with the recruitment process. We will contact you to discuss your requirements further.

#### **Supporting people with experience of homelessness**

As part of Homeless Link's commitment to support people with experience of homelessness, we have committed to giving feedback to applicants who have experience of homelessness.