



**Senior Customer
Success Lead
Recruitment Pack
May 2026**

Dear Applicant,

Thank you for your interest in this important role at the University of Lincoln Students' Union group of companies.

Predominately, as a Charity, we aim to ensure that all our members get the most out of their student experience at the University of Lincoln, whatever their interests or aspirations. We support students in numerous ways, such as facilitating a range of opportunities for extracurricular activities including sports and societies and volunteering opportunities, as well as engaging with Campaigns Groups, academic representation and running an Advice Centre advising on financial, academic, housing and wellbeing concerns. We have been blessed with a highly engaged staff team who all work to understand that they are making a real change to our members' lives every day they come to work.

In addition to our Charitable work, the Charity oversees four trading subsidiaries. These companies range from providing licensed trading facilities for Students and the local community in our Engine Shed, Towers, and The Swan operations, to providing an estate agency and accreditation scheme as well as two very successful tech companies. The profits from these commercial companies are then re-invested into student opportunities and support.

The Students' Union Management System (SUMS) Ltd. Is an award winning, sector leading CRM system, developed by a Students' Union, for Students' Unions. The SUMS platform helps ensure that students at the University of Lincoln, and all other Students' Unions that have licenced out the platform, have the best possible experience during their time at university. Our in-house team of developer's custom build modules for the platform and apps to ensure the experience of the users is continually improving.

We are looking for staff who want to work in a challenging but unique sector, who have the right culture and professional standards that we need to drive the organisation forward in to the future. We have fun and aim to create an exciting, vibrant and diverse working environment, whilst maintaining high professional standards and ensuring expectations are met.

Within this role you will build trusted relationships with Students' Union customers, helping them achieve long-term value from the SUMS platform through effective account management, onboarding, training, issue resolution, and advocacy.

For an informal conversation about this role, please do get in contact to arrange a time to chat!



James Brooks
SUMS Managing Director / ULSU Group Chief Executive



Our Organisation

An SU that makes a positive and noticeable difference to the lives of our members.'

Our Vision is to be...

A Students' Union where every Lincoln student has a great experience and is encouraged and assisted to fulfil their potential both at University and in life.

Our Mission...

We will be an independent, democratic, membership organisation, working in partnership with the University of Lincoln to ensure that our members' voices are heard, amplified and acted upon. We will be an important part of shaping and developing our students' academic, social, sporting and working life by providing services, advice, support and representation to all that need it, so that our students can be work-ready when they graduate.

Our Values...

Quality

We will make sure that everything we do is to a high standard. In everything we do, we will always aim to be the best.

Strong

We will be a strong, sustainable Students' Union that our members can trust to make their experience at Lincoln the best it can be.

Innovative

We will pursue and creative ideas, processes, and products to drive improvements in our services and how we engage with our members.

Inclusive

We will recognise and respect diversity and promote equal opportunities and belonging for all our members.

Honest

We will always be honest with our members. Everything we tell them will be the truth – they can trust us.

Dynamic

We will always respond and act quickly to any issues that affect our members, on campus, in the local community, or nationally.

About this Role

Senior Customer Success Lead, Full-time, Permanent, 37 hours/week

Grade 5A (£39,339 per annum) plus competitive benefits including pension, holiday allowance and salary sacrifice schemes.

This is an exciting opportunity for a Senior Customer Success Lead to join a fast growing, dynamic and award-winning organisation. The University of Lincoln Students' Union is a not-for-profit, value led organisation which exists to represent the interests of the 17,000 students and support their wider student experience through extracurricular activity.

In this role you will build trusted relationships with Students' Union customers, helping them achieve long-term value from the SUMS platform through effective account management, onboarding, training, issue resolution, and advocacy.

Details of this post and of all our vacancies, plus details on how to apply, can be viewed on <https://lincolnsu.com/vacancies>. If you have any queries or if you require any reasonable adjustments to be made throughout the recruitment process, please email: recruitment@lincolnsu.com.

The closing date for completed applications is Friday 19th June 2026 at 12pm noon.

If successful, candidates will be invited to a Panel Interview on Friday 26th June 2026.

The University of Lincoln Students' Union is committed to being an equal opportunities employer.

Job Description

JOB TITLE: Senior Customer Success Lead	DEPARTMENT: Product Development
LOCATION: Students' Union Management System Ltd.	REPORTS TO: Operations Manager
SALARY: Grade 5A £39,339 per annum, full-time, permanent, 37 hours per week	DATE: May 2026

Key Responsibility 1

Customer Relationship Management & Advocacy

Be the main point of contact for Students' Union customers, building strong relationships and being the familiar, friendly face of SUMS.

Be an advocate for the SUMS platform, confidently promoting its value, capabilities, and roadmap with customers in a clear and relatable way.

Promote SUMS internally and externally by sharing success stories, real-life use cases, and customer outcomes that highlight its impact across the Students' Union sector.

Develop a deep understanding of the SUMS system and its features, enabling confident conversations that position SUMS as a strategic solution.

Support customers while also championing SUMS, guiding them on best practice, effective system use, and the benefits of new features and improvements.

Represent SUMS confidently in sector events, and collaborative discussions, acting as a positive ambassador for the product and the company.

Management and development of the Customer Success Lead and the Customer Experience Coordinator, ensuring they are supported in fulfilling the requirements or their roles.

Key Responsibility 2

Customer Retention and Account Management

Own customer account relationships throughout the full customer lifecycle, from onboarding through to renewal.

Lead regular customer review meetings, ensuring actions, risks, and opportunities are effectively managed.

Maintain awareness of customer contract terms, renewal timelines, and agreed deliverables, working with the Operations Manager to support retention and renewal activity.

Help maintain long-term customer relationships by building trust, having honest conversations, and reinforcing the value and direction of SUMS.

Proactively keep an eye on customer satisfaction and engagement, spotting potential issues early and take proactive steps to resolve concerns.

Act as the voice of the customer internally, ensuring feedback, challenges, opportunities are clearly communicated to the relevant team and customer needs are understood and acted upon.

Balance customer advocacy with organisation priorities, communicating clearly and transparently during periods of challenge or change.

Key Responsibility 3

Sales and Commercial Growth

Spot opportunities to grow accounts, suggest useful add-ons, and support customers in getting the most from the platform, always putting their needs first.

Support a positive and professional brand experience that reflects our values and commitment to the SU sector.

Actively support the ongoing sale of the SUMS platform by confidently presenting its value and impact to both existing and prospective Students' Union clients.

Build strong, credible relationships with SU decision-makers, using product knowledge, sector insight, and customer success stories to position SUMS as a trusted, long-term partner.

Contribute to tender submissions and sales presentations by providing customer insights, use cases, documentation, training materials, and platform demonstrations tailored to prospect needs.

Lead or support product demonstrations, Q&A sessions, and follow-up discussions with prospective clients, ensuring a confident, informative, and approachable customer experience.

Use customer feedback, usage data, and success metrics to help articulate the benefits of SUMS in sales conversations and renewal discussions.

Collaborate with the Operations Manager to ensure sales messaging is accurate, consistent, and aligned with the product roadmap and customer experience strategy.

Key Responsibility 4

Documentation Management

To be responsible for the end-to-end documentation lifecycle ensuring the creation and maintenance of clear, concise, and user-friendly documentation (including User Guides, Video Guides, Release Notes, API Documentation, and Technical Specifications) enabling users to maximise their use of the SUMS System/Features.

Lead the development and ongoing maintenance of a comprehensive Knowledge Base (including FAQs and troubleshooting guides), to provide users with clear, accessible self-service resources that promote confidence and reduce reliance on direct support.

To ensure documentation is accurate, up-to-date, user focused, and aligns with industry standards and best practices.

To collaborate with Developers, and Subject Matter Experts to understand product features and functionalities.

To work with the Development/Infrastructure Team to document procedures and instructions for upgrades and improvements.

To collate feedback from stakeholders and incorporate revisions to improve the clarity and effectiveness of documentation.

To regularly review training materials to ensure it is continually fit for purpose and addresses the needs of key stakeholders.

Key Responsibility 5

Training and Enablement

To lead the planning, creation, and delivery of engaging, accessible training programmes for internal teams (Customer Experience, Product Development) and external users, ensuring that training aligns with product updates, new feature releases, and key system workflows.

To create and maintain a library of multi-format training materials (including video tutorials, step-by-step guides, presentation decks, and interactive walk-throughs), ensuring they are engaging, accurate, and accessible.

To coordinate and deliver live training sessions or webinars as needed for customer onboarding, new feature rollouts, and internal product updates, ensuring content is tailored to the audience and includes opportunities for feedback and Q&A.

To work closely with Customer Experience and Technical Teams to ensure training materials reflect current product functionality, address common support queries, and incorporate real-world use cases.

To monitor training effectiveness through feedback surveys, usage data, and support ticket trends, and continuously improve content to enhance user adoption and reduce knowledge gaps.

To ensure training resources are version-controlled and aligned with the product release cycle, with clear ownership and processes for updating materials in line with product iterations.

In addition, undertake such duties as may reasonably be requested and that are commensurate with the nature and grade of the post.

Additional Information

<p>Scope and Dimensions of The Role</p>	<ul style="list-style-type: none"> • Work in a manner that reflects the values of the organisation as shown in the Union’s constitution and strategic plan, and in line with Union policies and procedures. • Promote a positive image of the University of Lincoln Students’ Union at all times. • Keep abreast of relevant national and local developments and attend conferences, training events and meetings as necessary. • Maintain confidentiality in respect of all areas of the job responsibilities and be aware of current policy relating to current Data Protection Legislation. • Engage in appropriate training programmes as identified by your line manager. • Participate in the staff performance and development review scheme. • Actively follow and promote Union policies. • Some attendance at meetings outside normal office hours may be required to meet the needs of students and a flexible approach to working is essential. • Develop strong relationships with members of the Union’s Senior Management Team. • To undertake such other additional duties as may be required from time to time within the overall scope of the appointment as directed by the Senior Management Team.
---	--

<p>Key Working Relationships</p>	<ul style="list-style-type: none"> • Operations Manager • Customer Success Lead/ Customer Experience Coordinator • Developer team • ULSU Group SMT • ULSU Staff Team
----------------------------------	---

<p>External Contacts</p>	<ul style="list-style-type: none"> • SUMS Users - Students’ Union Contacts • Su Decision makers • External Service Providers/Contractors
--------------------------	---

Author	HSetchfield	Date Published	May 2026
--------	-------------	----------------	----------

Person Specification

Selection Criteria	Essential (E) or Desirable (D)	Where Evidence Application (A), Interview (I), Presentation (P), References (R)
Qualifications: Good general education background (qualified to level 3 – A Level equivalent)	E	A, I
Experience: <ul style="list-style-type: none"> • Customer-facing experience in Customer Success, Account Management, Client Services, or a similar tech, SaaS, or digital role. • Experience managing long-term customer relationships as a key contact or trusted partner. • Experience presenting products, running demos, or supporting renewals, upsell, or tender activity. • Experience delivering training, onboarding, or workshops for varied audiences. • Experience creating user-focused documentation, including guides, FAQs, training materials, knowledge base content, or release notes. • Experience working with internal teams to resolve issues and improve customer outcomes. • Experience using ticketing systems (for example, Zendesk) and collaboration tools (for example, Asana). • Experience supporting tender submissions. • Experience managing complex stakeholder relationships across multiple accounts. • Experience resolving customer issues or escalations professionally and constructively. • Experience working in fast-paced environments with changing priorities. • Experience in or with a Students' Union, higher education, or membership organisation. 	E E E E E E E D D E E E	A, I A, I A, I A, I A, I A, I A, I A, I A, I A, I A, I
Skills and Knowledge: <ul style="list-style-type: none"> • Excellent verbal and written communication, with the ability to explain complex systems clearly. • Strong relationship-building skills, including confidence with SU staff and senior decision-makers. • Commercial awareness with a customer-first approach. • Strong organisational skills and the ability to manage multiple priorities. • Confidence presenting to groups, delivering live training, and handling Q&A. 	E E E E E	A, I A, I A, I A, I A, I

<ul style="list-style-type: none"> • Able to gather, interpret, and communicate customer feedback effectively. 	E	A, I
<ul style="list-style-type: none"> • Comfortable working independently and collaboratively. 	E	A, I
<ul style="list-style-type: none"> • Strong IT skills, including Excel, Word, PowerPoint, and Outlook. 	E	A, I
<ul style="list-style-type: none"> • Understanding of version control and content management for documentation and training assets. 	E	A, I
<ul style="list-style-type: none"> • Ability to meet deadlines and adapt to changing priorities 	E	A, I
Competencies & Personal Attributes: <ul style="list-style-type: none"> • Confident, approachable, and people-focused, with a professional communication style. • Able to build credibility and trust quickly with a wide range of stakeholders. • Professional and credible when representing the company at meetings, events, and training sessions. • Self-motivated, proactive, and solutions-focused, with good attention to detail. • Resilient and adaptable, able to balance relationship management, sales support, documentation, and training. • Committed to continuous learning and process improvement. • Able to work collaboratively, use initiative, and show sound judgement. • Passionate about product quality, usability, and user success. 	E E E E E E E E	A, I A, I A, I A, I A, I A, I A, I A, I
Business Requirements:		
<ul style="list-style-type: none"> • Holds, a full, clean UK driving licence 	E	A
<ul style="list-style-type: none"> • May be required to undertake regular travel to customer sites and sector events 	E	A, I
<ul style="list-style-type: none"> • May be required to work the occasional evenings and weekends. 	E	A, I

Essential Requirements are those, without which, a candidate would not be able to do the job.

Desirable requirements are those which would be useful for the post holder to possess and will be considered when more than one applicant meets the essential requirements.

Please refer to the Guidance for Applicants accompanying this Recruitment Pack for further information.

Guidance for Applicants

Equality & Diversity

The University of Lincoln Students' Union is committed to ensuring all applicants have an equal opportunity when going through the recruitment process. As such, to ensure a fair process, this guidance document has been created to ensure all applicants have the same information. At any point during the recruitment process, if you require any help or reasonable adjustments made during the process, then contact recruitment@lincolnsu.com where a member of the HR Department will help you as best as they can.

Data Protection

Information provided by you in your application may be copied for use during the recruitment process. Once the recruitment process is completed, the data supplied by unsuccessful applicants will be stored for at least 6 months and will then be destroyed. The application of the successful candidate will be retained and used as part of the employee's personnel file.

Applicant Declaration

The applicant declaration form is available to download from our website <https://lincolnsu.com/vacancies/staff>. Please ensure that this is filled out accurately as your application will not be processed if it is incomplete from question 2 onwards. Any information provided in this section will not be used as part of the application process and will be removed to ensure no bias by any members of the panel.

Please let us know if any adjustments are necessary to any part of the recruitment process in order to cater for a disability. If you are offered the position, any adjustments that may be required will be considered in consultation with you. Please contact the HR Department on recruitment@lincolnsu.com if you wish to submit your application in an alternative format.

CV and Cover Letters

Along with an Applicant Declaration form, applicants must submit a CV and Cover Letter to be considered for a vacancy. Any information that you wish to be included in the application process must be included in the CV and Cover Letter. There may be certain situations whereby additional supplements will be accepted, such as portfolios, but these will be requested on the job advert.

Rehabilitation of Offenders and Disclosure

You are required to list any convictions that are not spent under the Rehabilitation of Offenders Act 1974. These will not be taken into consideration unless they are relevant to the duties of the post. If you need any further guidance, please contact the address on the previous page. Under the Police Act 1997, a Disclosure may be required from the Criminal Records Bureau prior to the confirmation of an appointment. A copy of the Criminal Records Bureau Code of Practice on Disclosure is available on request.

Education & Training

On your CV, you should include any formal education that you have received, with grades. E.g. University, Sixth Form, etc. As well as the details of any professionally accredited training courses that you have completed, with details of professional membership bodies, including any membership expiry dates if applicable.

Details of Relevant Training Courses Attended

Please also include any personal development courses in your application, such as First Aid, or Microsoft Suite training, along with the expiry date if applicable and the training provider if different to your most current place of employment.

Employment

Please provide details of your current/most recent employment, along with any notice period required. Then please provide a summary of your main duties and responsibilities within your role. This section does not need to be too long but a brief outline of what you did within your role.

Previous Employment

Please include information on your employment and voluntary history for the past 10 years, including length of employment, what the role was, and key responsibilities during that employment. Each section regarding key responsibilities does not need to include too much information, but just a brief overview of your main duties.

Experience

You should explain how your previous experience will allow you to fulfil the role you are applying for. The Job Description and Person Specification, which can be downloaded from the vacancy page, will help you tailor your experience for the role that you are applying for.

References

On the applicant declaration form, please ensure that you provide contact information for two references, with at least one being from your current or most recent place of employment. We understand that you may not wish for references to be contacted in case you feel that it would affect your current employment. As such, we would like to assure you that we will not contact references unless you are offered the role and then only once we have received signed and written consent from yourself that you are happy for your references to be contacted