Client Engagement Consultant – CRM (Salesforce OR HubSpot exp. req.)

United States · Full-time · **$100k–120k**

Client Engagement Consultant – CRM (Salesforce OR HubSpot exp. req.)
Location: must reside in the United States / must be able to work ET business hours
Salary: $100,000 - $120,000 + Project-based Commission (~5-8k annually) + Benefits
Benefits: Medical, Dental, Vision, 401k w/ 4% Match, Holidays, Unlimited PTO
Job Type: Full-Time | Work from Home
Typical Hours: Monday – Friday, 8:00 AM – 5:00 PM ET
Travel: Less than 5% domestic travel for client or company events
Start Date: ASAP
Sponsorship is not available

Client Engagement Consultant – CRM (Salesforce OR HubSpot exp. req.) Description

Our client, a growing B2B consulting firm, is looking for a Client Engagement Consultant to manage and grow relationships with existing clients. In this role, you will lead recurring client conversations, learn how each business operates, uncover challenges and opportunities, and help clients identify ways Salesforce or HubSpot could better support their goals. You will serve as the bridge between clients and the company's technical CRM team - asking thoughtful discovery questions, clarifying requests, and translating business needs into clear next steps for internal specialists. You will also help turn identified needs into additional projects by coordinating internal scoping, presenting proposed solutions, and guiding clients through the decision process. This is not a CRM developer or solution architect position. The ideal candidate has enough Salesforce or HubSpot knowledge to speak credibly about the platform's capabilities, combined with strong business acumen, consultative communication, relationship management, and commercial judgment. This is a great opportunity to own client relationships, identify growth opportunities within existing accounts, and make a direct impact in a small, collaborative consulting environment.

Client Engagement Consultant – CRM (Salesforce OR HubSpot exp. req.) Responsibilities

- Manage client relationships for assigned B2B accounts as the primary point of contact
- Lead recurring calls, discovery conversations, and project discussions within existing accounts
- Uncover client goals, pain points, process gaps, and new growth opportunities
- Translate business needs into CRM recommendations and project plans
- Partner with internal CRM and technical teams to execute client solutions
- Support Salesforce and/or HubSpot reporting, dashboards, and workflows
- Support user setup, fields/properties, process improvements, and adoption
- Create project timelines, documentation, process guides, and training materials
- Lead client training sessions and support CRM adoption efforts
- Monitor client CRM usage and recommend improvements to drive efficiency and growth
- Manage client priorities, deadlines, scope, and internal team capacity
- Stay current on CRM platform updates that may benefit clients

Client Engagement Consultant – CRM (Salesforce OR HubSpot exp. req.) Qualifications

- 3+ years of Salesforce (Sales Cloud) OR HubSpot (Marketing/Sales Hub) experience required
- 2+ years of B2B client-facing experience required
- Experience managing multiple client relationships/accounts simultaneously required
- Experience gathering requirements and translating needs into solutions required
- Comfortable asking questions to uncover needs and identify new project opportunities required
- Strong communication, organization, and problem-solving skills required

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