



Role	Onboarding Manager
Team	Customer Success
Reports to	Director of Customer Success
Line Manages	N/a

About the Role

The Onboarding Manager will partner with new and prospective customers to own their onboarding and PoC journey, ensuring they quickly realise value through seamless setup, integration, and process design.

Acting as the dedicated project lead, the Onboarding Manager ensures a smooth transition into adoption and long-term success.

This role is critical to:

- Accelerating Time-to-Value by giving customers a clear, confident start.
- Freeing CSMs to focus on long-term value, outcomes, and retention.
- Partnering across Technical Success, Sales, and Customer Success to ensure success from day one.
- Building scalable processes that allow evaluagent to onboard more customers efficiently as we grow.

Key Responsibilities

Project Delivery & Risk Management

- Lead onboarding projects from contract signature or PoC agreement through to successful handover to Customer Success.
- Develop and maintain onboarding plans with clear milestones, owners, risks, and outcomes.
- Identify, manage, and escalate risks or blockers early, creating mitigation plans where needed.
- Deliver a consistent “hypercare” period post-go-live to ensure adoption before transition to CSMs.

Customer Enablement & Collaboration

- Act as the dedicated point of contact during onboarding, building trust and confidence with new customers.
- Translate technical and process detail into clear, customer-ready solutions that align to business goals.
- Tailor onboarding journeys based on customer size, complexity, and industry.
- Collaborate with Sales, Technical Success, and Customer Success to ensure seamless transitions, documentation, and feedback loops with Product/Engineering.

Continuous Improvement & Scalability

- Own the continuous improvement of onboarding by capturing lessons learned, refining playbooks, and analysing metrics to identify trends.
- Support automation and process design to increase scalability and efficiency as the company grows.

Person Specification

Skills & Experience

- 3+ years' experience in SaaS onboarding, project management, or customer delivery.
- Proven track record of managing complex, multi-stakeholder onboarding projects.
- Able to quickly get to answers and present clear, customer-ready solutions.
- Commercially savvy with an applied understanding of SaaS business models and metrics.
- Excellent communication and facilitation skills – able to engage technical and non-technical stakeholders and translate concepts into customer outcomes.
- Familiarity with contact centre platforms and QA workflows a plus.
- Knowledge of integrations, data flows, or SaaS platform configuration.
- Experience working with Agile delivery methods; project management certifications (PRINCE2, PMP, Scrum, or similar) are a plus.
- Analytical mindset with the ability to interpret onboarding metrics, spot patterns, and drive improvements.
- Self-motivated, highly organised, and able to thrive in a fast-paced, dynamic environment.

Behaviours

- A natural project manager who thrives on organisation, accountability, and delivery.
- Curious: eager to understand customer needs deeply and always looking for ways to improve our onboarding process.
- Generous: collaborative, supportive, and willing to share knowledge to help both customers and colleagues succeed.
- Passionate: driven to deliver outstanding onboarding experiences that set customers up for long-term success.
- A proactive self-starter who will grow their own skills as well as pushing our team and company to be better.
- Thrives in a **remote, fast-paced, agile environment**, proactive in staying connected and resilient against isolation.

Performance Metrics

Time-to-Value (TTV): % of clients reaching value within agreed timeframes.

Onboarding Completion Rate: Projects delivered on time and to scope.

Customer Satisfaction: Measured through post-onboarding CSAT/NPS.

Internal Feedback: Quality of collaboration and handover with CSMs and cross-functional teams.

Process Efficiency: Improvements in scalability, repeatability, and automation of onboarding.

Risk Management: Timely identification and resolution of onboarding risks or escalations.