



<b>Role</b>	Onboarding Specialist
<b>Team</b>	Customer Success
<b>Reports to</b>	Director of Customer Success
<b>Line Manages</b>	N/a

### About the Role

The Onboarding Specialist plays a key role in delivering seamless, efficient onboardings, re-onboardings, and Proofs of Concept (PoCs) for our smaller and mid-tier customers.

You'll ensure that every customer starts strong — delivering accurate configurations, smooth integrations, and clear data-driven insights that accelerate their Time-to-Value.

Working closely with the Onboarding Manager, Technical Success, and Customer Success teams, you'll focus on delivery excellence and customer enablement, while supporting the Onboarding Manager to drive broader process strategy and improvement.

This role is critical to:

- Ensuring small and mid-size customers experience a smooth and value-focused onboarding.
- Delivering consistent, high-quality PoCs that demonstrate the power of evaluagent's platform.
- Supporting re-onboardings to drive adoption and optimisation.
- Collaborating across teams to ensure every customer has a confident, supported start.

## **Key Responsibilities**

### **Onboarding & PoC Delivery**

- Lead end-to-end onboarding and re-onboarding projects for smaller customers, from contract or PoC agreement through to handover to Customer Success.
- Deliver clear onboarding plans with milestones, owners, and measurable outcomes.
- Ensure all technical, configuration, and data setup tasks are completed to scope and on schedule.
- Run PoCs to demonstrate key value areas of the platform, ensuring rapid and successful outcomes.
- Provide structured handovers to CSMs following go-live or PoC completion.

### **Customer Enablement & Collaboration**

- Act as the dedicated point of contact during onboarding, building trust and confidence with new customers.
- Translate technical and process details into easy-to-understand, actionable steps.
- Collaborate closely with Technical Success and Customer Success to ensure alignment and a smooth customer journey.
- Contribute to documentation and data that feed continuous improvement and reporting.

### **Data Analysis & Insights**

- Create and interpret data visualisations to communicate progress and outcomes.
- Analyse onboarding metrics to identify risks, trends, and opportunities for improvement.
- Apply data-storytelling principles to report on customer outcomes and internal success measures.

## **Person Specification**

### **Skills & Experience**

- 3+ years' experience in SaaS onboarding, project management, or customer delivery.
- 3+ years of experience using unstructured text/conversational analysis tools
- 1+ years of experience working with AI tools
- Experience creating and interpreting data visualisations
- Experience in data analytics, with a working knowledge of best practices regarding data-storytelling
- 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.
- 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.
- Familiarity with contact centre platforms and QA workflows a plus.

### **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.