

Role	Technical Success Manager
Team	Technical Success
Reports to	Chief Technology Officer
Line Manages	N/a

About the Role

The Technical Success Manager (TSM) is a technical expert and a solution-focused partner for our prospects and customers. Working as part of an Onboarding Team, you'll scope solutions, run detailed technical discovery sessions, lead users through integrating our platform with their existing systems, and ensuring the initial setup of evaluagent it optimised to deliver fast and impactful results to win new business, enable upsells and drive long-term product adoption.

Working closely with Sales, Onboarding, Customer Success, and Engineering, you'll help win new business, enable upsells, and secure long-term adoption. This role is essential to:

- Ensure PoCs convert to wins by delivering fast, solution-led technical setups that demonstrate value.
- Give new customers the best foundation for adoption through accurate configuration and integrations.
- Optimise existing customers, driving upsell opportunities and reducing churn risk.
- Act as a trusted technical partner who can bridge the gap between business and technical needs.

Responsibilities

Technical Discovery & Solution Scoping

- Lead technical discovery sessions to understand customer systems, contact centre processes, QA workflows, team structures, and data requirements.
- Document customer technical environments and complete onboarding technical success plans and scoping documents.
- Identify potential technical risks, constraints, or dependencies during onboarding planning.

Integration Delivery

- Build and manage demo environments or isolated tenants for onboarding and PoCs.
- Ensure successful integration completion throughout early onboarding, including structured handover to Customer Success with final documentation and open technical items.

Technical Success Management

- Own the technical track of onboarding from discovery through successful delivery.
- Identify, document, and proactively manage technical risks during customer deployment.
- Collaborate closely with Engineering to troubleshoot and design solutions for complex integration and data flow issues.

Technical Documentation & Enablement

- Contribute to technical responses in RFPs, security questionnaires, and compliance reviews.
- Contribute towards internal knowledge bases for scalable technical onboarding.

Person Specification

Skills & Experience

- 3+ years in a SaaS technical role (Technical Success, Solutions Engineering, Pre-Sales, or Implementation).
- Proven experience in technical implementation, solution consulting, onboarding engineering, or integration delivery with measurable customer impact.
- Proven track record delivering technical setups, integrations, or building data pipelines
- Strong background with APIs, SaaS architectures, cloud integrations, webhooks, and data transformation.
- Skilled in solution design, troubleshooting, documentation production, and technical planning.
- Comfortable running technical discovery sessions, workshops, and PoCs with enterprise customers.
- Able to quickly get to answers and present clear, customer-ready solutions.
- Commercially savvy – comfortable supporting Sales with PoCs, identifying upsell opportunities, and demonstrating ROI.
- Working knowledge of popular CCaaS/CRM/Ticketing solutions (ie: Genesys, Five9/Intercom/Salesforce) will be considered a big plus for the role.

Behaviours

In this role, you'll be expected to get to **answers quickly, solve problems creatively, and communicate** in a way that builds trust across both technical and business stakeholders. As such, the following behaviours will be vital to your success;

- **Solution-driven:** approaches challenges with curiosity and creativity, always focused on delivering the right outcome for the customer. Loves making technology work for customers.
- **Commercially minded:** balances technical expertise with business awareness, spotting optimisation opportunities that lead to upsell and growth.
- **Comfortable engaging** with both technical and non-technical stakeholders.
- **Strong collaborator** across Sales, Onboarding, CS, Support, and Engineering teams.
- **Self-starter** who thrives in a remote, fast-paced, agile environment, proactive in staying connected and resilient against isolation.