| **Job Title:** | Technical Project Manager | **Job ID:** |  |
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| **Reports To:** | Director | Customer Operations | **Created:** | June, 2025 |
| **Department:** | Customer Operations | **Revised:** |  |

| ROLE PURPOSE |
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| The Technical Project Manager is responsible for onboarding and training of Delta-X Research’s SaaS products for new and existing customers. This role provides leadership to coordinate the customer and our internal functions (e.g. Sales, Customer Operations, etc.) to ensure a smooth transition after purchase and provides a consistent, high-quality implementation experience. This position leads end-to-end customer-facing projects, from onboarding and technical integration to refresher training and new product rollouts. The Technical Project Manager will also support internal initiatives, contribute to process improvements, and collaborate cross-functionally to ensure customers are set up for long-term success.  Success in this role requires strong project management skills, great communication, and a solid understanding of technical environments, including the ability to guide customers through system integration, ensure technical requirements are met, and coordinate effectively with internal teams. This is a customer-facing, hands-on role in a growing SaaS company, where aligning customer success initiatives with broader team priorities is essential. This role is also key to delivering on our value of “Easy” — ensuring that customers complete their project feeling confident, supported, and pleased that they chose Delta-X Research. |

| KEY RESPONSIBILITIES |
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| **Customer Onboarding**   * Lead customer onboarding process following introductions by Sales, ensuring a smooth and professional transition. * Invite Sales to participate in key onboarding moments, helping to maintain continuity and strengthen customer relationships. * Maintain strong alignment with Sales throughout the onboarding process to ensure a seamless, professional experience for the customer. * Deliver training through a structured series of sessions, adapting to the customer's needs. * Involve scientific or technical team members where deeper product expertise is required. * Ensure onboarding documentation is complete, accurate, and continuously improved based on customer feedback and internal insights. * Create or refine onboarding resources when gaps are identified, ensuring customers have everything they need to succeed. |
| **Customer Projects**   * Lead end-to-end implementation of new and existing customer projects across all Delta-X Research products, including kickoff, planning, execution, and closeout. * Develop project timelines, manage tasks and milestones, and serve as the primary liaison between the customer and internal teams. * Coordinate internal resources (e.g. technical support, developers, scientists) and customer stakeholders to ensure smooth delivery. * Keep projects moving efficiently by identifying and addressing risks and removing blockers. * Maintain detailed project documentation, status updates, and reporting to ensure transparency with customers and across teams. |
| **Technical Enablement & Integration Support**   * Develop a strong understanding of the technical architecture of Delta-X Research’s SaaS products, including data sources, integration points, and user environments. * Serve as a key liaison between customers and internal technical teams during integrations. * Guide customers through the technical onboarding process, including system requirements, installation steps, and integration workflows. * Collaborate with Tier 2 and development team members to gather requirements, clarify technical expectations, and document integration plans. * Translate technical concepts into clear language for non-technical stakeholders, both internally and externally. * Document best practices related to integrations between our products and customer systems. |
| **Customer Support**   * Act as a key contributor in triaging customer support issues, ensuring the right team members are engaged and follow-up is effective and timely. * Collaborate closely with Tier 1 and Tier 2 support team members to stay informed on active issues and evolving customer needs. * Take on support duties during absences or busy periods to maintain timely customer service. * Monitor support trends to proactively identify risks, recurring issues, or opportunities for improvement. |
| **Customer Engagement**   * Conduct post-implementation reviews to identify opportunities for improvement. * Perform customer check-ins to ensure satisfaction and retention. * Deliver refresher training and training on new features to maximize customer adoption. * Facilitate onsite training if appropriate, providing in-depth, personalized guidance. * Contribute to annual usage reviews to reinforce value and encourage long-term engagement. * Build relationships with key customer contacts, identifying new stakeholders and advocates. * Gather product feedback from customers and share insights with internal teams. * Support community-building initiatives that create customer advocates. * Be aware of customers’ evolving needs that may be filled by other products and notify the Sales team of such opportunities. |
| **Internal Projects**   * Contribute to internal projects that improve systems, processes, and/or cross-functional collaboration. * Bring project management structure to internal initiatives as needed, including scoping, planning, and progress tracking. |

| SKILLS & EXPERIENCE |
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| **Education** |
| * Bachelor’s degree or diploma in Business, Engineering, Computer Science, or a related field. * Equivalent combination of education and professional experience will be considered. * Education in technical disciplines that support understanding of software systems, data integration, or networked applications is strongly preferred. * Project Management certification (e.g., PMP, CAPM, or similar) is an asset. |
| **Experience** |
| Experience – Must Have:   * 5+ years of experience in project management, ideally in a SaaS, software, or other technical product environment. * Experience leading customer-facing implementations, onboarding, or training for software or technical products. * Experience working with or managing technical integrations or system implementations. * Proven ability to manage multiple concurrent projects. * Experience working cross-functionally with teams such as Sales, Technical Support, and Product Development. * Strong organizational and communication skills, with a track record of driving projects forward independently and collaboratively. * Comfort working directly with customers and translating technical concepts into clear next steps and decisions.   Experience – Preferred:   * Experience working in a customer success, customer operations, or post-sales delivery function within a SaaS company. * Familiarity with project management tools (e.g., Shortcut, Project Plan 365, or similar). * Public speaking or customer presentation experience, such as running kickoff meetings, training sessions, or product demos. * Experience working with science-based or technically complex products is an asset. * Awareness of cybersecurity considerations in a SaaS environment is an asset. |
| **Knowledge, Skills, and Abilities** |
| **Knowledge:**   * Solid understanding of project management principles, tools, and methodologies (e.g., timelines, scoping, risk management, stakeholder engagement). * Working knowledge of SaaS business models, customer onboarding, and post-sales implementation practices. * General understanding of technical integrations, APIs, or data systems — or an interest in learning how software connects within enterprise environments. * Awareness of customer success practices and how customer engagement supports long-term adoption and retention. * Familiarity with change management principles and how customers adopt new software.   **Skills**:   * Strong project planning and coordination skills, with the ability to manage timelines, tasks, and stakeholder alignment across multiple projects. * Excellent written and verbal communication skills, including the ability to explain technical concepts to non-technical audiences. * Confident facilitation skills, including running customer meetings and training sessions. * High level of organization and attention to detail, ensuring nothing falls through the cracks across onboarding and implementation workflows. * Comfortable using project management and collaboration tools. * Effective at fostering internal and external relationships remotely.   **Abilities:**   * Ability to manage competing priorities and ambiguity in a fast-paced environment. * Ability to adapt quickly to new products, tools, and customer requirements. * Ability to work independently and take initiative, while also being a collaborative team member and communicator. * Ability to manage customer expectations and maintain positive relationships. * Ability to navigate conflict with professionalism and empathy, balancing diverse perspectives to reach productive outcomes. * Ability to synthesize feedback from multiple stakeholders and turn it into actionable plans. * Ability to adapt language, timelines, and workflows to align with the needs and expectations of the electric utility sector, including communicating clearly with both technical and operational stakeholders. |

| KEY RELATIONSHIPS |
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| * Sales team * Product Development team * Research team |