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

ROLE PURPOSE

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

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.

KEY RESPONSIBILITIES

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.

KEY RESPONSIBILITIES

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.

EDUCATION & EXPERIENCE

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 & 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

- Sales team
- Product Development team
- Research team