

Customer Onboarding Specialist

Hours of Work: 37.5 per week

Reports To: Head of Customer Services

Overall Responsibilities:

To set up new customers for immediate success by facilitating the onboarding process for those transferring from another partner. As a Customer Onboarding Specialist, you will educate new customers, help solve existing system issues and ensure smooth adoption of Tecman's products and services.

Key Skills and Experience:

- 3+ years' experience with Business Central either in a support or consulting role
- Experience of Dynamics 365 Sales or Service advantageous
- Passionate about helping customers.
- Ability to quickly learn new technologies and to explain these to customers.
- Excellent communication skills
- Problem solver
- A good understanding of how businesses operate and able to qualify operational challenge
- You will be expected to visit customer sites to complete the onboarding process

Main Areas of Responsibility:

- Deliver and continually improve existing onboarding process
- Develop an understanding of transferring customer's business processes and operational objectives.
- Reviews of customer's existing solutions to document current use of their Business Central or D365 CRM and any existing issues – including existing processes, system problems, training requirements etc
- Complete onboarding documentation and build onboarding plan including plan for resolution of existing issues, consultancy requirements and training needs.
- Manage the customer's experience up until handover to Customer Engagement Manager and Helpdesk.
- Complete follow up reviews as required