

Job Title:	Customer Operations Specialist	Location	Remote in Canada
Reports To:	Director Customer Operations	Created:	Mar 2026
Department:	Customer Operations	Revised:	

ROLE PURPOSE

The Customer Operations Specialist plays a key role in enabling customer success through hands-on training, proactive support, and thoughtful guidance across the customer lifecycle. Focused on onboarding and ongoing engagement, this role helps customers adopt our tools, understand key features, and resolve technical challenges with confidence.

Working closely with Sales, Product Development, and Customer Operation project management, the Specialist prepares demo environments, assists with database setup, and is a key provider of customer training and Tier 1 technical support.

Success in this role requires strong communication skills, curiosity, and a problem-solving mindset. By supporting and educating users, the Specialist ensures customers feel confident, supported, and empowered.

KEY RESPONSIBILITIES

Customer Training & Success

- Deliver engaging training sessions for customers during onboarding and throughout their lifecycle, helping users adopt and gain value from our products.
- Support the coordination of training sessions by preparing materials and tailoring content, in collaboration with the Technical Project Manager.
- Monitor customer adoption and proactively identify opportunities for education, re-training, or support to improve customer satisfaction.
- Collaborate with Marketing, Sales, and Product Development to ensure training aligns with product capabilities, customer needs, and business objectives.
- Contribute to customer-facing resources such as knowledge base articles, videos, and technical guides to support self-service success.

Presales Technical Support

- Assist the Sales team by preparing databases for customer demos.
- Help maintain and improve technical documentation to support presales conversations.
- Collaborate with Sales and Product Development to ensure demo environments reflect current product capabilities.

KEY RESPONSIBILITIES

Customer Onboarding Support

- Configure TOA databases and prepare clean, validated data.
- Support onboarding activities by troubleshooting data formatting or setup issues.
- Contribute to the refinement of onboarding tools, templates, and documentation.

Technical Support

- Act as first responder for technical support tickets, providing timely, professional assistance.
- Investigate and resolve software-related issues, coordinating with development when needed.
- Maintain detailed records of support interactions and resolutions in HubSpot.
- Escalate issues appropriately and follow up to ensure resolution and customer satisfaction.

Internal Collaboration & Product Support

- Work closely with the Product Development team to identify bugs and validate fixes.
- Provide feedback from support cases to inform product improvements.
- Contribute to internal projects that improve support workflows, tools, and processes.

Documentation & Knowledge Management

- Maintain and improve technical support documentation, ensuring accuracy and clarity.
- Identify recurring issues and create support resources to reduce resolution time.
- Maintain internal knowledge bases to support team and cross-department use.

HubSpot Management

- Maintain and improve Customer Operations' HubSpot pipelines, workflows, fields, and templates.
- Create and manage dashboards and reports to track Customer Operations metrics.
- Collaborate with all departments to align HubSpot configuration with company needs.
- Support company usage of HubSpot by documenting best practices and providing guidance and internal training.
- Monitor data quality and address inconsistencies to maintain a clean, reliable CRM.
- Liaise with external support for advanced configuration or technical issues.

SKILLS & EXPERIENCE

Education

- Bachelor's degree or diploma in Computer Science, Engineering, Physics, or a related technical or scientific field.
- Equivalent combination of education and professional experience will be considered.
- Education or certifications supporting knowledge of customer success, sales operations, or CRM tools are considered assets.
- Technical aptitude and understanding of data workflows, scientific software, or utility industry applications are strong advantages.

SKILLS & EXPERIENCE

Experience

Experience – Must Have:

- 3+ years of experience in a customer-facing role involving technical support, training, or onboarding for software or SaaS products.
- Proven ability to resolve customer issues professionally, efficiently, and with empathy.
- Experience communicating technical concepts to non-technical audiences in written and verbal formats.
- Demonstrated success creating or maintaining customer-facing documentation such as training guides, FAQs, or knowledge base articles.
- Experience working cross-functionally with teams such as Product Development, Sales, and Marketing.
- Strong analytical and troubleshooting skills, with a keen attention to detail.
- Comfort learning complex systems and guiding others through usage, onboarding, and adoption.
- Experience using customer-facing platforms such as HubSpot, Zendesk, or similar CRMs and ticketing tools.

Experience – Preferred:

- Experience supporting or training users on SaaS tools in a B2B environment.
- Familiarity with the electric utility sector, engineering workflows, or scientific data systems.
- Exposure to asset management, condition monitoring, or predictive maintenance technologies.
- Experience working with CRM data hygiene, workflow automations, or technical configuration in tools like HubSpot.
- Awareness of cybersecurity principles in customer support or software settings.
- Experience delivering virtual customer training, product walkthroughs, or webinars.
- Working proficiency in Spanish or French is a strong asset.

Knowledge, Skills, and Abilities

Knowledge:

- Solid understanding of technical support processes and their role in customer satisfaction, retention, and product development.
- Familiarity with SaaS business models and customer workflows in scientific, engineering, or technical environments.
- Working knowledge of software troubleshooting, data preparation, and common integration challenges.
- Awareness of how customer training, technical documentation, and onboarding contribute to scalable customer success.
- Basic understanding of cybersecurity practices related to customer support and data handling.
- Knowledge of electric utilities, power systems, or scientific domains is an asset.

SKILLS & EXPERIENCE

Skills:

- Skilled at delivering effective customer training sessions tailored to user roles, needs, and product use cases.
- Proficient in managing support requests, triaging issues, and communicating solutions clearly and professionally.
- Strong written communication skills for creating customer-facing resources such as FAQs, guides, and knowledge base articles.
- Competent in using and customizing CRM and support tools (e.g., HubSpot) to support customer operations and track engagement.
- Analytical and detail-oriented, with the ability to investigate and resolve issues independently or collaboratively.
- Capable of preparing and validating customer environments for onboarding and support use.

Abilities:

- Ability to manage shifting priorities across customer training, support, and internal systems like HubSpot.
- Ability to translate technical concepts into accessible language for diverse user groups.
- Ability to build strong customer relationships through education, responsiveness, and proactive engagement.
- Ability to maintain calm and empathy in high-pressure or complex customer situations.
- Ability to work independently while contributing to a collaborative, remote-first team culture.
- Ability to surface trends, suggest improvements, and advocate for customer needs internally.
- Ability to adapt and grow with evolving responsibilities as the role shifts over time.

KEY RELATIONSHIPS

- Sales
- Product Development
- Project Management