



Winmore Job Description

Implementation Consultant (North America - Remote)

Job Responsibilities:

Winmore's Implementation Consultant reports to the Director of Customer Success. The position will be responsible for supporting new customers as they onboard their users and processes into the Winmore Software. Onboarding consists of, but is not limited to:

- Collaborate with Engineering to provision and configure the new customer environment.
- Pre-configure the system to ensure accurate setup and core functionality.
- Develop a detailed Project Plan and align on implementation steps with the customer.
- Model the customer's business processes within the Winmore platform.
- Support historical data migration, including data mapping, validation, and customer walkthroughs.
- Ensure critical data is captured to enable meaningful reporting and dashboard creation.
- Configure system workflows and business rules using Winmore's admin tools.
- Drive customer satisfaction by managing onboarding milestones and resolving issues proactively.
- Lead End-User, Train-the-Trainer, and Admin training sessions to ensure adoption.
- Document the system configuration and key decisions at Go-Live.
- Coordinate a seamless transition to the Customer Support team post-onboarding. Would you like a version tailored for an internal SOP doc or external-facing material?

The position will also assist in supporting the customer support team with the implemented customers. Support consists of, but is not limited to:

- Respond to end-user support inquiries, complaints, feedback, and enhancement requests in alignment with defined SLAs.
- Rapidly verify and escalate system outages reported by customers to minimize downtime and disruption.
- Troubleshoot functional issues and software bugs, resolving cases independently, when possible, prior to Engineering escalation.
- Collaborate with cross-functional teams to triage and prioritize issues based on customer communication, operational impact, and onboarding timelines.

The position will also assist in managing the account after implementation. Account management consists of, but is not limited to:



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- Ensure customer satisfaction post-implementation
- When a customer engages in professional service hours, configure workflow processes and updates to data structure in software and document custom configurations—in the same way initial implementation is handled.

Skills Required

The ideal candidate will understand the transportation and logistics industry, preferably focused on the RFP and Bid process. Knowledge of account onboarding and Carrier sourcing would also be beneficial.

For new customer implementations, this person must have well-developed verbal and written communication skills as well as a thorough knowledge of the software application and be able to describe its functions, features and details to end-users. They should be comfortable training groups and individuals via video conferencing. The position will require working closely with new customers to understand their business requirements. The successful Implementation Consultant will quickly gain an understanding of the Winmore platform and capabilities and will be able to translate customer processes and data-needs into configuration that fits within the system's parameters.

For customer success, the individual must have excellent time management skills and be able to quickly jump from one focus to the next. It is imperative that the professional can quickly identify and escalate systemic outages as well as blockers to new customer implementations. They will also be able to thoroughly troubleshoot and create reproduction documentation on reported issues and prioritize issues using several criteria, including how many customers and users are affected, if there are feasible workarounds, if it's a core feature and if it's a common use-case.

Education, Experience and Competencies:

Business Requirements:

- Experience with SAS implementations,
- Understanding of business process modeling,
- Excellent strategic & technical thinking,
- Ability to consultatively engage with customers and to quickly make complex decisions,
- Thrives in a fast-paced, entrepreneurial environment,
- Experience leading customer facing discussions,
- Attention to Detail that can be translated into both customer-facing and internal documentation of customer business requirements, processes and configuration,
- Ability to coordinate with the product team and customer to define and refine solutions for customer use-cases outside of current system functionality,
- Experienced in, connected with and knowledgeable of the logistics industry.



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Technical Requirements

- Experience with web-based software solutions,
- Enjoys problem solving and finding innovative solutions,
- Can quickly learn and internalize software capabilities and translate customer use-cases into system configuration,
- Experience QA'ing and Regression Testing from an end-user perspective highly desirable,
- Experience with integrating software systems highly desirable,
- Experience building dashboards via BI tools preferred,
- SQL and JSON languages preferred

Personal Competencies

- Fluent English speaking and writing skills,
- Intrinsically motivated to ensure customer success and satisfaction,
- Strong interpersonal and communication/listening skills,
- Professional and confident in working with high profile clients,
- Disciplined, structured, with a balance between analysis and action,
- Team player but also able to self-manage and work independently,
- Strong and current knowledge of technology platforms and ability to quickly adapt to new software,
- Relevant bachelor's or master's degree preferred.

Background in logistics, warehousing and 3PL RFP Management is highly preferred.

To learn more, please contact **David Amézquita** at david.amezquita@winmore.app.