

Implementation Specialist (B2B SaaS / Fintech)

Position Type: Full-Time

Location: Remote (US-based, Pacific or East Coast hours; Pacific time zone preferred)

Salary Range: \$60,000 - \$80,000 (OTE: \$70,000 - \$90,000) + Competitive Equity

Role Overview

We are seeking a proactive, client-facing Implementation Specialist with direct bookkeeping and accounting experience to join a fast-growing financial technology platform.

Functioning essentially as an SMB Customer Success Manager, you will be the foundational point of contact for small to mid-sized accounting and bookkeeping firm clients during their critical first 90–100 days.

This is a highly collaborative, well-defined individual contributor role perfect for someone who thrives on guiding clients through product training, ensuring quick time-to-value, and setting users up for long-term operational success.

Key Responsibilities

- **Lead Client Onboarding:** Conduct comprehensive onboarding and software training calls via Zoom (ranging from 1-hour initial setups to 15–45 minute specialized syncs) to ensure fast platform adoption.
- **Portfolio Management:** Oversee the implementation lifecycle for a high-volume portfolio of SMB accounting partners, managing their transition and usage during their first three months.
- **Drive Client Success:** Act as the primary point of contact for customer inquiries throughout the onboarding phase, safeguarding high client retention and post-implementation renewal rates.
- **Product Advocacy:** Document and synthesize customer feedback, feature requests, and pain points to collaborate with internal teams and directly inform the product development roadmap.

Core Requirements

Experience & Mindset

- **Industry Foundations:** 1+ years of direct, hands-on professional bookkeeping or accounting experience (required).
- **SaaS Client Relations:** Ideally 2+ years of experience in a customer-facing role (Customer Success, Account Management, or Onboarding) within a B2B SaaS environment.
- **Early-Stage Agility:** Prior experience thriving within a fast-paced, early-stage startup environment.
- **Individual Contributor Focus:** A desire to execute standard processes and engage daily in customer-facing training, rather than seeking high-level strategy or purely technical development roles.
- **Stable Career Progression:** A track record of sustained tenure in prior positions (avoiding multiple job transitions under two years).

Strategic & Functional Competencies

- **SMB Training Expertise:** Proven ability to coach, teach, or train SMB business clients on adapting new software workflows.
- **Technical Familiarity:** Practical, daily experience utilizing standard ledger and accounting software (such as QuickBooks or Xero).
- **Modern Tooling Fluency:** Comfort working across a robust tech stack spanning client communication, scheduling, video recording, and CRM management platforms.

Communication & Engagement Skills

- **Clear Articulation:** Strong ability to break down workflow steps and software capabilities into clear, encouraging, and actionable guidance for accounting professionals.

Interview Roadmap

1. **Introductory Sync:** Initial screening conversation to review alignment, background, and expectations.
2. **Hiring Manager Interview:** A 45-minute deep dive into technical background and customer success philosophy.
3. **Take-Home Assignment:** A practical exercise mimicking real-world onboarding or client training scenarios.
4. **Leadership Deep Dive:** Interview with the Head of Customer Success.

5. **Executive Interview:** Conversation with the Chief Executive Officer.
6. **Reference Check:** Final verification of professional background.
7. **Offer Extended:** Final selection and offer presentation.