

Onboarding Solutions Consultant

Onboarding & Implementation | Pre-Sale to Go-Live

Location	Cedar Rapids, IA (Onsite)
Reports To	Manager, Client Delivery
Works With	Sales, Implementation, Account Management, Revenue Operations
Travel	50% standard, with burst to 75% during peak season
Company	Collective Data — Fleet & Asset Management SaaS

About the Role

Collective Data is seeking a Onboarding Solutions Consultant to serve as the critical bridge between commercial and implementation. This role owns the prospect-facing discovery and scoping process, translating an organization's current-state operations into a detailed, defensible proposal for onboarding. You will be the first technical voice a prospect hears and the last handoff before implementation begins.

You are not a traditional pre-sales engineer and you are not an implementation consultant — you sit deliberately between both. You diagnose before you prescribe, document before you propose, and scope before you commit. Your output is a current-state assessment and a solution proposal that tells the implementation team exactly what they are walking into and tells the customer exactly what they are buying.

Why This Role Exists

Most onboarding challenges originate in the sales process — not the implementation. Scope is underestimated, change management complexity is overlooked, and implementation teams inherit commitments they were never consulted on. The Onboarding Solutions Consultant closes that gap.

This role creates a repeatable, documented bridge between “we’d like to move forward” and “here’s what moving forward actually requires.” Every proposal produced by this role is backed by a documented current-state assessment, a level-of-effort estimate in hours, and a clearly defined scope of work.

Core Responsibilities

Current-State Discovery & Documentation

- Lead structured discovery sessions with prospects to map all existing workflows, data sources, and systems being replaced or integrated
- Identify and document every method the prospect currently uses to manage fleet and asset data: competing software platforms, spreadsheets, paper-based records, and manual data entry processes
- Assess data quality, volume, and format across all current-state sources to determine migration complexity
- Document stakeholder roles and responsibilities related to fleet and asset management operations
- Identify change management complexity: number of users, departments affected, training needs, and operational disruption risk
- Capture integration requirements with third-party systems (ERP, fuel management, HR, GIS, procurement)

Level-of-Effort Scoping

- Translate current-state findings into a structured level-of-effort (LOE) estimate, expressed in implementation hours, across all onboarding workstreams
- Apply standard LOE frameworks to common onboarding scenarios while exercising judgment for non-standard environments
- Differentiate and document hours across data migration, configuration, training, integration, and change management workstreams
- Identify scope risks and document assumptions that could cause LOE to shift
- Collaborate with the Implementation team to validate estimates prior to proposal delivery
- Maintain and improve LOE benchmarks based on post-implementation actuals

Solution Proposal Development

- Author the solution proposal document that serves as the commercial and technical foundation for new customer agreements
- Structure proposals to clearly define what is included, what is excluded, and what is contingent on assumptions
- Present solution proposals to prospects, walking stakeholders through scope, timeline, and investment with confidence
- Partner with Account Management and Revenue Operations to ensure proposals align with pricing frameworks and approval requirements
- Support deal desk review by providing technical substantiation for professional services line items

Commercial-to-Implementation Handoff

- Produce a comprehensive onboarding brief at the close of each deal, including all current-state documentation, validated LOE, agreed-upon scope, and identified risks
- Facilitate a structured handoff meeting with the implementation team, ensuring nothing discovered during the sales process is lost in transition

- Serve as a resource for the implementation team during early onboarding stages when scope questions arise
- Document any scope changes that emerge post-sale and route them through the appropriate approval process

Process Improvement & Knowledge Management

- Maintain a library of current-state discovery templates, scope frameworks, and LOE benchmarks
- Identify recurring scope patterns across prospect types (fleet size, sector, data complexity) and codify them into reusable frameworks
- Contribute win/loss insights to Sales and Account Management regarding discovery patterns that correlate with successful implementations
- Partner with the Implementation team to continuously refine LOE accuracy based on actual project outcomes

Key Deliverables

Every engagement this role touches produces two primary documents:

Deliverable	Description
Current-State Assessment	A structured document mapping all existing systems, processes, data sources, integrations, users, and change management complexity. This becomes the technical foundation for the proposal and the handoff brief for implementation.
Solution Proposal	A commercial and technical proposal that translates the current-state assessment into a scoped onboarding engagement, expressed in implementation hours by workflow, with defined inclusions, exclusions, and assumptions.

What This Role Is — and Is Not

This Role IS	This Role Is NOT
The first technical voice a prospect hears after commercial interest is established	A closing resource responsible for generating new pipeline
Responsible for diagnosing current-state complexity before a commitment is made	An implementation consultant who delivers the project
The author of scoped, defensible proposals backed by documented discovery	A pre-sales engineer focused on product demonstration

The handoff point ensuring implementation teams inherit complete context	A customer success function responsible for ongoing adoption
A process builder who improves LOE accuracy over time through documented outcomes	A project manager who owns delivery timelines and milestones

Key Metrics You'll Own

- LOE estimate accuracy (actual hours vs. proposed hours, by engagement)
- Time from discovery kickoff to proposal delivery
- Proposal-to-close rate (proposals where LOE is accepted without material revision)
- Implementation escalations attributable to scope gaps at point of sale
- Current-state documentation completeness score (assessed at handoff)

Required Qualifications

Experience

- 3–5 years in a solutions engineering, pre-sales consulting, business analyst, or implementation scoping role within a SaaS environment
- Demonstrated experience conducting structured discovery with enterprise or government buyers
- Track record of translating operational complexity into defined, scoped deliverables
- Experience working in environments where customers are replacing manual, paper-based, or spreadsheet-driven workflows with purpose-built software
- Comfort navigating procurement-heavy, government and public sector sales environments is strongly preferred

Skills

- Discovery and questioning skills: ability to lead structured sessions that surface unstated complexity
- Technical writing: produces clear, defensible documentation that non-technical stakeholders and implementation engineers can both use
- Scope discipline: maintains clear boundaries between what is and is not included in a proposal
- LOE reasoning: can estimate hours by workstream and defend those estimates with documented assumptions
- Change management awareness: identifies organizational and process complexity, not just technical complexity
- Stakeholder communication: comfortable presenting scope and investment to department heads, IT leads, and procurement officers

- Cross-functional collaboration: builds trust with Sales (who want deals closed), Implementation (who inherit the work), and Revenue Operations (who govern the proposal)

Technical Aptitude

- Ability to quickly understand fleet and asset management workflows, even without prior domain experience
- Familiarity with common data environments (CSV exports, spreadsheet-based tracking systems, legacy software)
- Comfortable assessing integration complexity at a conceptual level (does not require development skills)
- Proficiency with CRM tools (HubSpot preferred) for logging discovery notes and proposal status
- Strong documentation skills using standard business tools (Google Workspace, Microsoft Office)

Preferred Qualifications

- Background in fleet management, asset management, public works, utilities, or municipal operations
- Experience scoping professional services engagements with an hourly or project-based pricing model
- Prior work in a company transitioning from founder-led sales to a structured pre-sales process
- Familiarity with government procurement cycles, RFP response processes, and multi-stakeholder approvals
- Exposure to change management frameworks (Prosci, ADKAR, or equivalent)

Who is Collective Data?

Collective Data is a leading provider of Fleet Management and Asset Management software for both the public and private sectors. Our mission is to empower organizations with intelligent software solutions that help streamline operations, reduce costs, and improve efficiency.

Why Join Us?

At Collective Data, we value innovation, collaboration, and the personal growth of our employees. We offer a competitive salary and benefits package, flexible work arrangements, and an environment where your input is valued and encouraged.

Interested in making a difference with Collective Data? Please submit your resume and cover letter detailing your relevant experience to careers@collectivedata.com

Collective Data is an Equal Opportunity Employer. All qualified applicants will receive consideration for employment without regard to race, color, religion, sex, national origin, or protected veteran status and will not be discriminated against on the basis of disability.