Solutions Engineer (Sales & Customer Success)

Department: Sales
Reports to: Director of Sales
Location: Remote

About B3 Insight

B3 Insight delivers industry-leading water and pressure intelligence to oil & gas producers, water midstream, and financial stakeholders. Through our OilfieldH2O platform and related data products, we help customers make profitable, responsible decisions about water, injection, pressure, seismicity, and related risks across key US basins.

Role Overview

The **Customer Solutions Engineer** sits at the intersection of sales, customer success, and product. This role drives value across the full "post-signature to power user" journey, while also supporting pre-sales technical conversations and value positioning.

You will:

- Lead onboarding and training for new clients
- Deliver technical demos and workflow-based sales conversations
- Provide responsive customer support and account license management
- Track and report on user engagement
- Investigate, document, and share customer workflows and use cases
- Identify opportunities to expand into new user groups within existing accounts
- Capture customer requirements for new datasets, connectors, and tools to inform B3's roadmap

This is a high-impact, customer-facing role on the Sales team that helps ensure customers not only buy B3, but also deeply integrate it into their day-to-day work.

Key Responsibilities

1. Pre-Sales Support & Technical Demos

- Partner with Account Executives and the Director of Sales to deliver compelling, workflow-driven demos of B3's platform and data products.

- Translate technical capabilities (e.g., pressure, seismicity, injection, water, land & infrastructure data) into concrete customer use cases and business value.
- Tailor demos and presentations to different personas (operations, geology, water management, finance, ESG, etc.) within the same organization.

2. Client Onboarding & Training

- Own the onboarding experience for new customers: kickoff, configuration support, user training, and early adoption.
- Develop and maintain standardized onboarding plans, checklists, and training materials for different customer segments.
- Run live and recorded training sessions (1:1 and group) to help users embed B3 into their daily workflows.

3. Customer Support & Account Operations

- Serve as a front-line resource for user questions on platform usage, access, and data-related issues, in coordination with Support / Product / Data teams.
- Manage account license structures: add/remove users, ensure correct license assignments, coordinate with Sales on expansions or renewals.
- Document and maintain clear records of account configuration, user groups, and special workflows or data dependencies.

4. Workflow Discovery, Use Cases & Product Feedback

- Proactively investigate and understand how different users and teams leverage B3's platform and datasets in their work.
- Codify and catalogue customer workflows and use cases in a structured, reusable format (playbooks, internal wiki, templates, short videos, etc.).
- Identify patterns and opportunities to expand B3 usage into new user groups and departments within existing customer organizations.
- Regularly surface customer feedback and feature requests related to:
    - New datasets
    - Data integrations/connectors (e.g., BI tools, internal data lakes, other SaaS)
    - Workflow tools and reporting needs

5. User Engagement Tracking & Reporting

- Track login activity, feature usage, and engagement across key accounts using available tools and reports.
- Build and maintain simple reporting that shows:
    - Adoption and engagement by account, team, and user type
    - At-risk accounts or users needing training/support
    - Opportunities for license expansion and new use cases

- Present insights to the Director of Sales and broader team to inform renewal and expansion strategy.

6. Cross-Functional Collaboration

- Collaborate with Sales, Product, and Data teams to prioritize customer-driven enhancements, integrations, and content.
- Provide structured feedback on common questions, support tickets, and workflow gaps to improve documentation, training assets, and product UX.
- Help shape and periodically update standard demo scripts, onboarding flows, and “best practice” workflows for internal and external use.

Qualifications

Must-Have:

- Strong technical aptitude and curiosity; comfortable learning complex datasets, maps, and analytics tools
- Excellent communication skills, both written and verbal, with the ability to explain technical concepts to non-technical users
- Proven experience running live demos, trainings, or workshops for customers
- Experience managing multiple accounts or workstreams in parallel, with strong organizational skills
- Comfort digging into data, dashboards, or basic analytics to answer “how are users really using the product?”
- Comfort with contacting users to understand both how they are using the product/tools and (more importantly), where value gaps exist

Nice-to-Have:

- 3+ years in a customer-facing role in B2B SaaS or data products
    - Examples: Sales Engineer, Solutions Consultant, Customer Success Manager, Product Specialist, or similar
- Experience in oil & gas, water management, energy, or geospatial / mapping tools
- Familiarity with workflows of operations, water, geology, regulatory, or finance/ESG teams in the energy sector
- Experience with tools like HubSpot or other CRMs, product analytics tools, or BI/reporting platforms
- Prior work documenting or designing workflows, playbooks, or internal knowledge bases

Success in This Role Looks Like

In your first 12–18 months, success will look like:

- Consistently strong feedback from customers on onboarding, training, and support interactions
- Increased active usage and depth of engagement across key accounts
- Clear, documented workflows and use cases that help Sales and Product teams better understand how customers use B3
- Identified and supported expansions into new departments and user groups at existing customers
- A steady stream of structured, actionable feedback to the product roadmap around data needs, connectors, and workflow improvements

To Apply

Email us at careers@b3insight.com with your resume and a short note about why you're excited about the role.