

Phase 1: Problem Understanding & Industry Analysis

1. Requirement Gathering

- Identify business goals: Improve customer retention, reduce churn, speed up onboarding, and enhance support responsiveness.

#Capture functional requirements:

- Centralize customer data (Accounts, Contacts)
- Manage onboarding (track tasks, status)
- Monitor support (log cases, SLAs)
- Analyze usage patterns (metrics from product)
- Generate renewal and upsell alerts
- Collect non-functional requirements: security, data privacy, mobile access, integration with support/product systems.

Sample CRM requirements template elements:

- Data model: Custom & standard Salesforce objects for lifecycle tracking.
- Workflows: Automation for onboarding reminders, escalations, recurring tasks.
- Integration: Sync with external support/product tools.
- Reporting: Health dashboards, churn/renewal forecasts.

2. Stakeholder Analysis

- Stakeholder Identification: List internal (CSMs, Support, Sales, Executives) and external users (end customers).
- Role/Influence Mapping: Map stakeholder needs and influence:
- Executives: Strategic KPIs, dashboards

CSMs: Day-to-day customer health, onboarding

Support: Case management, priority queues.

Use stakeholder matrices (e.g., Power-Interest grid) to document involvement & needs.

Plan engagement: Meetings, workshops, feedback sessions for input on pain points and must-haves.

3. Business Process Mapping

Map SaaS customer lifecycle:

Awareness → Purchase → Onboarding → Support → Renewal/Upsell → Advocacy.

Illustrate current/desired workflows:

Onboarding: Automated task assignments, milestone tracking

Support: Case capture, escalation, resolution SLAs

Product Usage: Capture telemetry/events, flag risk/expansion

Visualize handoffs between teams (Sales→Onboarding→Support→Renewals).

4. Industry-Specific Use Case Analysis

Common SaaS use cases:

Predictive health scoring: Automatic assessment of churn risk or upsell potential

Automated onboarding: Task checklists, progress tracking

Support automation: Case routing, escalation, satisfaction surveys

Telemetry-driven engagement: Proactive support for under-engaged users

Examples:

AI tools for risk scoring (Gainsight, Totango)

Automated renewal workflows (ChurnZero, Planhat)

Self-service success/AI chatbots for support scale

5. AppExchange Exploration

Review AppExchange for:

Customer Success Management (Gainsight, Totango, ChurnZero)

Support Desk/Case Management (Zendesk, Service Cloud extensions)

Onboarding/onboarding checklist apps (TaskRay, Precursive)

Usage tracking (Adoption dashboards, telemetry connectors)

Assess fit with requirements and Salesforce compatibility.