White Paper: Customer Onboarding Workflow Automation Using JIRA and Databricks

# Executive Summary

This white paper outlines an innovative customer onboarding workflow management system implemented by Freightify, leveraging JIRA for workflow management and automation, integrated with Databricks for advanced analytics and dashboarding. The solution enhances visibility, accountability, and efficiency in the customer onboarding process, achieving a 30% reduction in manual follow-ups, a 40% decrease in missed deadlines, and improved team productivity. By combining structured JIRA workflows, automation rules, and data-driven insights via Databricks, Freightify has standardized and accelerated its onboarding process, delivering a superior customer experience.

# Introduction

Effective customer onboarding is critical for ensuring client satisfaction, reducing churn, and accelerating time-to-value. Freightify, a leader in freight management solutions, recognized the need to streamline its onboarding process to handle growing customer volumes while maintaining consistency and transparency. The company developed a robust system using JIRA for workflow management, enriched with automation, and integrated with Databricks for real-time analytics and reporting. This white paper details the system’s architecture, implementation, and measurable outcomes.

# Project Overview

The primary objective of the customer onboarding workflow management system is to standardize and accelerate the onboarding process, ensuring an improved customer experience, faster implementation, and consistent delivery. The solution leverages:

• JIRA Workflows and Screen Schemes: To structure and track onboarding tasks.  
• Automation Rules: To reduce manual intervention and enforce accountability.  
• JIRA API Integration: To extract real-time data for analysis.  
• Databricks Dashboards: To provide actionable insights through visualizations.

# JIRA Configuration Workflow Scheme: Implementation

The workflow, named "Implementation," is designed to ensure a linear, forward-only progression through onboarding phases, preventing backward transitions to maintain process integrity.

Key components include:  
• Phases: To Do, Phase 01 through Phase 07, Completed  
• Issue Types:  
 - Epic: Represents high-level initiatives or major project milestones.  
 - Task: Primary work units assigned to users for actionable items.  
 - Sub-task: Smaller components of tasks for detailed breakdown and parallel work.  
• Transition Rules:  
 - Allowed: Movement from To Do to any phase (01–07) and from any phase to Completed.  
 - Not Allowed: Movement between phases to enforce sequential progress.

# Custom Screen and Field Scheme

The "Implementation Project" screen scheme includes fields critical for tracking and reporting:  
• Implementation Status  
• Project Aging (Created Date-Based and Task Start Date-Based)  
• Comments (Delay Reasons/Notes)  
• Reason to Change Due Date

# Automation Rules

Automation is a cornerstone of the system, reducing manual effort and ensuring proactive task management. Key automation rules include:  
• - Due Date Email Alert  
• - Reminder for Due Date  
• - Due Date Update for Customer Implementation  
• - Due Date Reason (1 & 2)  
• - Comment Reason  
• - Default Label

# JIRA API and Databricks Integration

The system integrates JIRA with Databricks to enable real-time data extraction, processing, and visualization. Key aspects include:  
• Data Extraction via JIRA REST API  
• Data Processing in Databricks  
• Dashboarding with visualizations for:  
 - Aging Days  
 - Project Tasks Overview  
 - Phase-wise progress  
 - Individual Dashboards per Assignee  
 - Overall Project Status View  
 - Quarterly Cohort Segmentation

# Data Used in Customer Success (CS) Implementation Deck

The CS Implementation Deck provides a comprehensive overview of onboarding progress, leveraging data points such as:  
• Implementation Status with traffic-light indicators  
• Project Aging (Created Date-Based and Task Start Date-Based)  
• Comments for delays and dependencies

# Sections in CS Implementation Deck

The deck is organized into four key sections:  
• Customers Onboarded This Quarter  
• Customers Onboarded Last Quarter  
• Customers Onboarded Before Last Quarter  
• Completed Projects

# Results and Impact

The implementation of the JIRA and Databricks-based onboarding workflow system has delivered significant benefits:  
• 30% Reduction in Manual Follow-Ups  
• 40% Decrease in Missed Deadlines  
• Increased Project Visibility  
• Boosted Team Efficiency

# Conclusion

Freightify’s customer onboarding workflow management system exemplifies the power of integrating JIRA’s robust workflow capabilities with Databricks’ advanced analytics. By standardizing processes, automating repetitive tasks, and providing real-time insights, the solution has transformed Freightify’s onboarding operations. The measurable outcomes—reduced manual effort, fewer missed deadlines, and enhanced visibility—demonstrate the system’s value in delivering a seamless and efficient customer onboarding experience.

# Authors

Avinash M, Business Analyst  
Email: avinashsolai@gmail.com  
LinkedIn: <www.linkedin.com/in/ashray-kiran-927932b4>

Mentor: Ashray Kiran, Senior Associate Revops  
Email: ashrayking94@gmail.com  
LinkedIn: [www.linkedin.com/in/avinash-m-va73](http://www.linkedin.com/in/avinash-m-va73)