Business Analyst Case Study: SaaS Onboarding Optimization

Problem Statement

The company's customer onboarding process was inconsistent and lengthy, leading to delays in client adoption and increased churn within the first 90 days. Internal teams relied on multiple disconnected tools (email, spreadsheets, CRM), making it difficult to track progress or provide a seamless customer experience.

Scope of Work

- Map the As-Is Process across Sales, Implementation, and Customer Success

- Gather Requirements from stakeholders

- Analyze CRM and support ticket data to identify bottlenecks

- Design To-Be process with automation opportunities

- Propose KPIs & Reporting Dashboards to measure onboarding success

Business Analysis Techniques Used

- Stakeholder Analysis (RACI Matrix)

- Process Mapping (As-Is & To-Be swimlane diagrams)

- Requirements Gathering & RTM

- Data Analysis (cycle time, churn, NPS)

- Gap Analysis

- Use Cases / User Stories

Proposed Solution

- Centralized Onboarding Portal integrated with CRM

- Automated workflows for tasks & communications

- Standardized Playbook for onboarding steps

- Power BI Dashboard for onboarding KPIs

Key Deliverables

- As-Is & To-Be Workflow Diagrams

- Requirements Documentation & RTM

- Data Analysis Report

- KPI Dashboard Wireframe

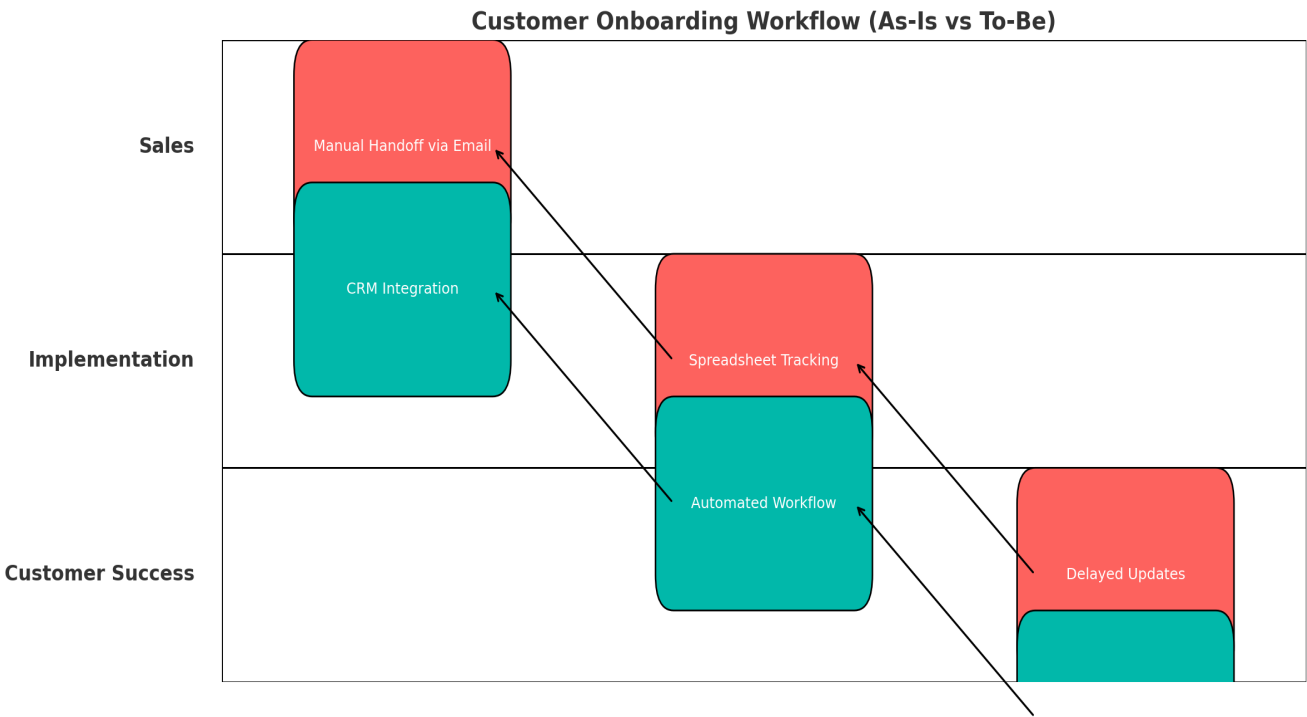- Final Business Case Presentation

Results (Hypothetical)

- Reduced onboarding cycle time from 21 → 12 days (43% improvement)

- Increased customer adoption rate by 25% within 90 days

- Decreased early churn rate from 15% → 8%

- Improved cross-team visibility, reducing errors by 40%

Sample Requirements Traceability Matrix (RTM)

Req ID	Requirement	Priority	Stakeholder	Status
R1	Centralized onboarding portal	High	Product Owner	Proposed
R2	Automated task reminders	High	Customer Success	Proposed
R3	KPI dashboard	Medium	Executives	Proposed

Workflow Diagram (As-Is vs To-Be)

Customer Onboarding Workflow (As-Is vs To-Be)

KPI Dashboard Mockup (Power BI Style)

Onboarding KPI Dashboard (Power BI Style)