

**RESEARCH METHODOLOGY FOR OPTIMIZING CLIENT ONBOARDING AND CROSS-
FUNCTIONAL COMMUNICATION IN DIGITAL TRANSFORMATION PROJECTS:**

A BUSINESS ANALYSIS FRAMEWORK FOR QUALIZEAL

BY

NITHIN BHEEM REDDY

UNDER THE SUPERVISION OF

PROFESSOR FRANCESCA DUNLEVY

A RESEARCH PROPOSAL SUBMITTED IN PARTIAL FULFILLMENT OF THE

REQUIREMENTS FOR THE DEGREE OF

MASTER OF BUSINESS ADMINISTRATION

IN

BUSINESS ANALYTICS

UTICA UNIVERSITY

2024

The Research Question

The central research question for this project is: How can Qualizeal optimize its client onboarding process and improve cross-functional communication during digital transformation projects?

Research Design and Methodology

This research aims to analyze and propose solutions for optimizing client onboarding and cross-functional communication within Qualizeal, especially in digital transformation projects. To achieve these objectives, a combination of observational methods, structured interviews, and surveys was employed to gather data on existing processes, challenges, and areas for improvement. Each data collection method was structured to reveal specific insights about the current state of Qualizeal's internal workflows and client experience, ensuring a comprehensive understanding of the challenges and opportunities within the organization.

Participants

Internal Participants: Internal participants included team members from key departments within Qualizeal—Project Management, IT Services, Sales, and Customer Support. Each of these departments plays an essential role in the client onboarding and project delivery process, and insights from these teams were instrumental in identifying cross-functional challenges.

Project Managers: A mix of senior and junior project managers was interviewed to ensure that perspectives from different experience levels were considered. These individuals are directly impacted by communication and process efficiency in client-facing tasks.

IT and Digital Transformation Specialists: Interviews were conducted with technical team members involved in client onboarding, as their role is central to delivering and implementing

client solutions. These insights provided an understanding of cross-functional communication from a technical perspective.

Client Participants: To gain a rounded perspective, surveys were sent to clients recently onboarding at Qualizeal. Feedback was gathered on clarity, efficiency, and overall impressions of the onboarding process.

Data Collection Methods

1. Observational Analysis of Qualizeal's Website and Digital Resources

An initial step involved carefully observing Qualizeal's website, as well as publicly available materials such as case studies, client success stories, and white papers. This observational analysis provided an understanding of how Qualizeal presents its value proposition, client success metrics, and digital transformation capabilities.

Special attention was given to sections like "Our Approach," "Client Success Stories," and "Digital Transformation Services." The information offered in these sections reflected Qualizeal's brand and service offerings while also revealing insights into the company's messaging. This review raised important questions: How well does the internal team align with the public messaging about onboarding? Are clients experiencing a process as seamless as the website suggests?

Strengths observed included a clear focus on outcome-driven success stories; however, potential gaps were also noted, such as limited information on the onboarding process itself. This analysis suggested areas where Qualizeal's public messaging might be realigned with internal practices to set more accurate expectations.

2. Structured Interviews with Qualizeal Staff

Structured interviews were conducted with select staff members across departments.

Questions focused on onboarding, communication challenges, and perceived process inefficiencies. These questions were designed to gather in-depth qualitative data and uncover specific barriers to smooth interdepartmental communication.

Sample questions included:

"Please describe your role in the client onboarding process."

"What are the main challenges when coordinating with other departments during onboarding?"

"Does the onboarding process match the expectations set by our website? Why or why not?"

Although the interview format was structured to maintain consistency, opportunities for open-ended follow-ups were also included, often revealing additional insights. For example, it was frequently noted that the lack of centralized communication tools contributed to misalignment between technical and client management teams.

3. Client Surveys on Onboarding Experience

Following the interviews, a survey was distributed to recent Qualizeal clients to capture their onboarding experiences. The survey was structured using a funnel approach, starting with general questions about satisfaction levels and then progressing to more specific inquiries regarding clarity, perceived efficiency, and overall satisfaction.

Key survey questions included:

"How would you rate the clarity of information provided during onboarding?"

"What were the biggest barriers, if any, faced during onboarding?"

"Did the onboarding experience meet expectations set by Qualizeal's online materials?"

Survey responses provided a unique perspective on client experiences. A notable trend emerged regarding the gap between the website's portrayal of onboarding and the actual client experience, with many clients citing a lack of early-stage guidance. This insight highlighted the need for alignment between marketing messages and operational practices.

[4. Internal Surveys for Cross-Functional Feedback](#)

In addition to client surveys, an internal survey was administered to gather quantitative feedback on cross-functional communication. Likert-scale items were included to measure satisfaction with communication tools, frequency of miscommunication, and perceived efficiency during onboarding.

Sample questions included:

"How effective are the current tools (e.g., Slack, Trello) in facilitating communication with other departments?"

"How frequently is miscommunication encountered during onboarding?"

"To what extent do other departments provide support during client onboarding?"

The data collected through these internal surveys highlighted specific areas for improvement. Many respondents reported frequent miscommunication between the sales and technical teams, indicating a need for more integrated project management tools.

Reflections on Data Collection

The combination of observational analysis, structured interviews, and surveys provided a holistic view of Qualizeal's challenges in its onboarding and communication processes. The website review established a basis for examining alignment (or misalignment) between external messaging and internal practices. Structured interviews and surveys then allowed for an in-depth

exploration of these areas, capturing diverse perspectives within the organization and from clients.

These findings will form the basis of recommendations to enhance communication tools, align public messaging with the onboarding experience, and implement client feedback loops for ongoing improvement.