

## **Module 1 — Project Brief**

### **Understanding the Business Problem**

#### **SaaS Product Analytics Case: NordicFlow CRM**

This document provides the full business context for the SaaS Product Analytics case used in PortfolioStack. It is written as a realistic internal project brief, similar to what a product analytics consultant or in-house data professional would receive at the start of an engagement.

The purpose of this brief is to establish a shared understanding of the company, the product, the market, and the organizational challenges that drive the need for analytics. All analytical, technical, and visualization work that follows in later modules is grounded in the context defined here.

This document is intentionally detailed. It is designed to be walked through during instruction, used as a reference during development of analytical models and dashboards, and revisited when explaining design decisions in interviews or portfolio reviews.

### **Company Background**

NordicFlow CRM is a European B2B SaaS company headquartered in Copenhagen, Denmark. Founded in 2019, the company has grown steadily across the Nordic region and selected European markets. NordicFlow provides a subscription-based customer relationship management (CRM) platform aimed at small and mid-sized businesses that require a modern, compliant, and easy-to-adopt sales system.

The CRM market NordicFlow operates in is mature and highly competitive. Large global incumbents dominate many enterprise accounts, while numerous smaller tools compete on niche features or vertical specialization. NordicFlow's positioning is not based on feature parity alone, but on a combination of usability, workflow-driven design, and a strong emphasis on data privacy and regulatory compliance.

As a European company, NordicFlow markets itself as a GDPR-first alternative to US-based platforms. This positioning resonates with customers who are sensitive to data residency, privacy, and compliance, but it also places pressure on NordicFlow to deliver clear and demonstrable product value.

### **The Product and How Value Is Created**

NordicFlow CRM is a browser-based, app-centric product designed for frequent use by sales teams. It supports the full sales workflow, from lead management to deal progression and follow-up activities. Core capabilities include pipeline configuration, deal tracking, activity logging, task management, collaboration within shared workspaces, and configurable

workflow automation.

The product is designed to be flexible enough to support different sales processes, while still guiding users toward best practices through structure and automation. For many customers, NordicFlow becomes the system of record for customer interactions and sales performance.

A critical concept in this project is the distinction between activity and value. Logging into the application or performing isolated actions does not, on its own, indicate that the product is delivering value. Value is realized when teams consistently rely on NordicFlow to manage their sales process, coordinate work, and drive outcomes. This distinction has significant implications for how usage, engagement, and success are measured analytically.

### **Customers and Usage Reality**

NordicFlow primarily serves small and mid-sized businesses with approximately 20 to 300 employees. Customers span a wide range of industries, including SaaS, professional services, logistics, manufacturing, and B2B agencies. Most customers operate across multiple European countries, often with distributed or hybrid sales teams.

Typical users of the product include sales representatives, sales managers, and operations or revenue operations roles responsible for configuring pipelines and workflows. These user groups interact with the product in different ways and at different frequencies, creating varied usage patterns.

In practice, NordicFlow observes significant variation in customer maturity. Some teams adopt the product deeply, configuring pipelines, logging activities consistently, and using automation to reduce manual work. Other teams struggle to move beyond basic usage, resulting in superficial engagement that fails to deliver meaningful value. Smaller customers, in particular, are sensitive to onboarding friction and time-to-value, making early usage behavior a critical determinant of long-term success.

### **Organizational Landscape**

Internally, NordicFlow has evolved from an early-stage startup into a scaling organization. As the company has grown, so has its internal complexity. Teams have expanded, responsibilities have become more specialized, and leadership expectations have shifted from experimentation toward predictable execution and scalable processes.

The organization is structured around several core functions, including Product, Growth & Marketing, Sales, Customer Success, and Executive Leadership. Each of these groups depends on product data, but each approaches that data with different priorities, incentives, and decision contexts.

This diversity of perspectives is both a strength and a challenge. Without shared definitions

and consistent metrics, analytics can become fragmented, with different teams drawing different conclusions from the same underlying data.

### **Business Challenges Driving the Analytics Initiative**

Over the past year, NordicFlow's leadership team has identified several recurring challenges that have prompted investment in a dedicated product analytics initiative.

First, while trial signups have increased steadily, activation rates remain inconsistent. A meaningful share of new users create accounts but fail to reach a point where the product becomes embedded in their daily workflow.

Second, usage data indicates that many users log in without adopting core features such as pipeline management, deal progression, or workflow automation. When surface-level activity is interpreted as engagement, it creates misleading signals about product success.

Third, early churn has begun to appear, particularly among smaller customers. These customers often churn not because the product lacks features, but because they fail to realize value quickly enough.

Finally, different dashboards and reports across the organization tell conflicting stories. This lack of alignment makes it difficult for leadership to prioritize initiatives or evaluate the impact of product changes.

### **Strategic Ambitions and Success Criteria**

In the short term, NordicFlow's ambitions are focused on execution and clarity. The company aims to improve onboarding experiences, increase activation consistency, and reduce early-stage churn. Success in this phase is defined not only by improved metrics, but by improved confidence in decision-making across teams.

In the medium term, NordicFlow plans to expand into additional European markets, strengthen its product-led growth motion, and introduce more advanced automation and premium features. Customer Success is expected to evolve from a primarily reactive function into a proactive, data-driven organization.

In the long term, NordicFlow aims to become a leading European CRM platform that can compete credibly with global incumbents. Product analytics is viewed as a strategic capability that enables focus, scale, and sustained competitive advantage.

### **Role of Analytics and the Data Professional**

Within NordicFlow, analytics is positioned as a core decision-support function. Its role is not simply to report on what has happened, but to provide insight into why it happened and what actions should be taken as a result.

As the data professional in this case, your responsibility is to create clarity in an

environment where data exists but understanding is fragmented. This includes defining trusted metrics, making assumptions explicit, and ensuring that analytical outputs can be interpreted consistently across teams.

You are not responsible for setting product strategy, designing features, or executing commercial initiatives. Your value lies in reasoning, communication, and the ability to support decisions with evidence rather than opinion.

### **From Context to Analytics Work**

The context defined in this document informs all downstream analytical choices, including KPI definitions, data modeling decisions, and dashboard design. Metrics and models are not neutral artifacts; they reflect assumptions about value, behavior, and success that are established here.

With a shared understanding of the business problem in place, the project can now move into data reality. The next phase focuses on source systems, product event data, data quality challenges, and the Raw → Bronze → Silver architecture that will support analytical modeling and decision-making.