

About the Document

This is a BRD for a "Customer Onboarding and Success Portal" for a B2B SaaS company.

The document contains defined scope, distinct functional/non-functional requirements, and decisions on integration and technology.



Customer Onboarding and Success Portal (COSP)

BRD

Document Version	Date	Author	Status
1.0	2025-11-09	Capstone Project Team	Draft

1. Executive Summary

This document outlines the business requirements for the **Customer Onboarding and Success Portal (COSP)**. The goal is to **reduce churn** and **improve time-to-value (TTV)** for our B2B SaaS customers by providing a centralized, self-service platform for new user onboarding, product documentation, and usage analytics. The existing process is fragmented across email, shared drives, and disparate support tools, leading to customer frustration and high manual effort for our Customer Success Managers (CSMs).

2. Business Objectives & Drivers

ID	Objective	Metric / Success Criteria (SMART)	Priority (Must/Should/Could)
BO-01	Reduce Customer Churn	Decrease net churn rate by 5 percentage points within 12 months of COSP launch.	Must
BO-02	Improve Time-to-Value (TTV)	Reduce average customer TTV (first feature adoption) from 30 days to 14 days within 6 months.	Must

BO-03	Increase CSM Efficiency	Reduce time spent by CSMs on manual onboarding tasks by 25% .	Should
BO-04	Boost Self-Service Rate	Increase the percentage of support questions resolved via the portal (without a ticket) to 40% .	Should

3. Project Scope

3.1. In Scope

- **Self-Service Onboarding Workflows:** Step-by-step guidance for new users based on their subscription tier.
- **Knowledge Base Integration:** Centralized display and search of all existing product documentation.
- **Usage Data Visualization:** Personalized dashboards showing the customer's utilization of the main SaaS product.
- **Customer Milestones/Progress Tracking:** A visual tracker for onboarding completion and key feature adoption.
- **Internal Tool Integration:** Integration with the existing CRM (Salesforce) to pull customer data (e.g., subscription tier, key contacts).

3.2. Out of Scope

- In-app product tours or guided experiences **within** the core SaaS application.
- A complete replacement of the existing support ticketing system (Zendesk will remain the primary ticketing tool).
- Any financial/invoicing functionality.

4. Key Stakeholders

Stakeholder Role	Name/Team	Responsibility in Project
Project Sponsor	VP of Customer Success	Final sign-off and budget authority. Defines success metrics.
Product Owner	Director of Product Mgmt.	Prioritizes features and accepts final deliverables.

Key End Users	Customer Success Team (CSMs)	Provide feedback on content and workflow effectiveness.
Technical Lead	SDM / IT Architecture Team	Design, development, and system implementation.

5. Requirements

5.1. Functional Requirements (FR)

ID	Requirement Description	Priority (C/H/M)	Rationale
FR-01	The COSP must allow customers to securely log in using their main SaaS product credentials (Single Sign-On).	Critical	Core usability and security.
FR-02	The system must display a personalized onboarding checklist based on the customer's subscription level (Tier 1, Tier 2, etc.).	Critical	Enables BO-02.
FR-03	The COSP must integrate with the existing knowledge base API to allow seamless content searching and viewing.	High	Centralized information.
FR-04	The system must display a dashboard showing the customer's adoption metrics (e.g., daily active users, feature usage count).	High	Key to BO-01 and TTV.
FR-05	The COSP must provide a 'Contact CSM' button that pre-populates an email or a Zendesk ticket with customer details.	Medium	Enables efficient support.

5.2. Non-Functional Requirements (NFR)

ID	Requirement Description	Category	Priority (C/H/M)
NFR-01	Performance: All pages must load within 2 seconds for 95% of requests.	Speed	Critical
NFR-02	Security: The system must comply with ISO 27001 standards and use industry-standard encryption (TLS 1.2+).	Security	Critical
NFR-03	Scalability: The system must be capable of supporting 10,000 concurrent users without degradation in performance.	Volume	High
NFR-04	Reliability: The system uptime must be 99.9% (excluding scheduled maintenance).	Availability	High
NFR-05	Usability: The user interface must be responsive and fully functional on major web browsers (Chrome, Firefox, Edge) and mobile devices.	User Experience	Medium

6. Constraints, Assumptions, and Dependencies

6.1. Constraints

- **Budget:** Project budget is capped at **\$500,000 USD**.
- **Timeline: Phase 1 (MVP)** must be live within **6 months**.
- **Integration:** Must use **RESTful APIs** for all third-party system integrations.

6.2. Assumptions

- The necessary **APIs** for the existing SaaS product, CRM (Salesforce), and Knowledge Base (Confluence) are available and well-documented.
- Customer Success Managers will be trained and actively use the portal's internal-facing features.
- Dedicated DevOps resources will be available for deployment and maintenance.

6.3. Dependencies

- Availability of the **Usage Data Pipeline** team to define and expose the necessary customer usage metrics.

- Final sign-off on the **security architecture** by the Chief Information Security Officer (CISO).