

Functional Specification: Onboarding Optimization Initiative

1. Project Overview & Objectives

This project aims to reduce onboarding completion time by 40% within 6 months, improve first-contact resolution to 85% within 3 months, and increase CSAT scores by 20% over 6 months through enhanced visibility, cross-functional alignment, and system integration.

? Project Objective: To streamline the onboarding process by improving system integration, role-based access, real-time data visibility, and team accountability, resulting in faster resolution times and higher customer satisfaction.

2. Scope Boundaries:

Optimize the onboarding workflow by enhancing system integrations, refining role-based access, and enabling real-time monitoring and escalation to meet defined KPIs.

? In-Scope: ['Integration with Salesforce (CRM), Okta (identity provider), and Segment (analytics) via secure APIs', 'Real-time dashboards for support agents and supervisors with biweekly KPI tracking', 'Role-based access control (RBAC) with data visibility limited to assigned customer segments', 'Automated case escalation for delays exceeding 72 hours', 'Biweekly performance reviews and cross-functional workshops to monitor progress', 'Implementation of caching and retry logic to mitigate CRM API latency', 'Validation of KPIs against defined targets (onboarding time, first-contact resolution, CSAT)']

? Out-of-Scope: ['Redesign of the core CRM or identity provider platforms', 'Development of new customer-facing onboarding portals', 'Changes to compensation or incentive structures for support teams', 'Integration with third-party billing or contract management systems', 'Long-term product roadmap planning beyond the 6-month initiative window']

3. Current State (As-Is)

? Onboarding cases are manually created and updated across CRM and support systems, causing delays and data inconsistencies.

? Support agents lack real-time visibility into case status, leading to redundant follow-ups and slower resolution.

? KPIs are reported monthly, delaying feedback and reducing responsiveness to performance issues.

? Escalations for overdue cases rely on manual monitoring, often resulting in delays beyond 72 hours.

? Role-based access is inconsistently enforced, with agents sometimes accessing unauthorized customer data.

As-Is Process Flows

? Case Resolution Workflow:

? Happy path:

- ? 1. Customer submits onboarding request via web form
- ? 2. Support agent manually creates case in CRM
- ? 3. Agent resolves issue during first contact
- ? 4. Case status updated in CRM and analytics platform

? Unhappy path / exceptions:

- ? 1. Agent lacks access to required customer data due to role restrictions
- ? 2. CRM API latency delays case creation or update
- ? 3. No automated escalation for cases exceeding 72 hours
- ? 4. Manual tracking leads to missed follow-ups and delayed resolution

AS-IS Process Diagram: [as-is_case-resolution-workflow_20251121_163334.svg](#)

4. Future State (To-Be)

- ? Onboarding cases auto-create in CRM and sync across Salesforce, Okta, and Segment within 15 minutes of submission.
- ? Support agents get real-time alerts and role-based dashboards showing assigned cases and resolution guidance.
- ? Cases exceeding 72 hours without resolution auto-escalate to supervisors with immediate notifications.
- ? Biweekly KPI reports track onboarding time, first-contact resolution, and CSAT with automated validation against targets.
- ? Caching and retry logic ensure data consistency during CRM API latency, maintaining system reliability.

Future Process Flows

? Automated Onboarding Case Management:

? Happy path:

- ? 1. Customer submits onboarding request via web form
- ? 2. Case auto-created in CRM and synchronized to Okta and Segment within 15 minutes
- ? 3. Agent receives real-time alert and views case on personalized, role-based dashboard
- ? 4. Agent resolves case within first contact; status updates in real time
- ? 5. KPIs automatically updated and reported biweekly with performance validation

? Unhappy path / exceptions:

- ? 1. CRM API fails during sync; system retries up to 3 times with 5-minute intervals

- ? 2. Case remains unresolved past 72 hours; automatic escalation to supervisor triggered
- ? 3. Data inconsistency detected; validation workflow initiated with Platform Engineering

TO-BE Process Diagram: *to-be_automated-onboarding-case-management_20251121_163334.svg*

5. Stakeholders & Personas

- ? Support Agent: Frontline team member responsible for resolving onboarding cases within first contact; accesses real-time dashboards and escalation tools for assigned customer segments.
- ? Supervisor: Oversees active cases, monitors KPIs biweekly, and escalates cases exceeding 72 hours; has full visibility across all customer segments.
- ? Platform Engineer: Responsible for API integration, data pipeline reliability, caching logic, and system performance; ensures data consistency across Salesforce, Okta, and Segment.
- ? Product Manager: Validates use cases and ensures feature alignment with onboarding goals; collaborates with support and engineering teams.

6. Functional Requirements Overview

The system enables real-time case creation, role-based access, automated escalation, and KPI tracking across integrated platforms to reduce onboarding time, improve resolution rates, and boost CSAT scores.

7. Non-Functional Requirements

- ? Data synchronization between systems must occur every 15 minutes or less
- ? System must support 99.5% uptime during business hours
- ? Role-based access must be enforced with zero privilege escalation
- ? All KPIs must be reportable biweekly with historical tracking
- ? APIs must support retry logic and caching to handle latency up to 10 seconds

8. Assumptions

- ? Support teams will adopt new workflows with minimal resistance
- ? CRM API version 2.1 will remain stable throughout the 6-month rollout
- ? Segment will continue to provide accurate event tracking for CSAT and case resolution data
- ? Cross-functional collaboration will remain consistent through biweekly workshops
- ? Data governance layer will prevent data silos across systems

9. Risks

- ? CRM API latency may delay case synchronization, impacting onboarding time KPI
- ? Support team resistance to new workflows may reduce first-contact resolution rate
- ? Integration errors between Salesforce and Segment could lead to inaccurate KPI reporting
- ? Unplanned downtime in Okta could block access to identity data for onboarding
- ? Delayed feedback from product team may delay validation of use cases

10. Open Issues

- ? Pending clarification on exact data retention policy for case logs
- ? Uncertainty around third-party audit requirements for compliance with data privacy standards
- ? No finalized agreement on escalation ownership in multi-team cases
- ? Clarification needed on fallback process if caching fails during peak load
- ? Pending confirmation on whether supervisors can view historical case data beyond 6 months

11. Functional Requirements

Functional Requirements

FR-1

Description: Onboarding case must be automatically created in Salesforce CRM within 15 minutes of customer submission via web form.

Business Rules / Data Dependency: Depends on CRM API version 2.1; requires successful authentication via Okta; triggers event in Segment for tracking.

FR-2

Description: Support agents must receive real-time alerts and access to assigned cases via a role-based dashboard.

Business Rules / Data Dependency: Access limited to customer segments assigned to the agent; data refreshes every 5 minutes; requires Okta authentication.

FR-3

Description: System must detect and escalate cases that remain unresolved beyond 72 hours to the supervisor.

Business Rules / Data Dependency: Escalation triggered automatically when case status is 'Open' and creation timestamp exceeds 72 hours; notifies supervisor via email and dashboard alert.

FR-4

Description: Biweekly KPI reports must be generated and shared with stakeholders, including onboarding completion time, first-contact resolution rate, and CSAT scores.

Business Rules / Data Dependency: Reports generated from Segment and CRM data; validated against target thresholds; distributed via secure shared drive.

FR-5

Description: Role-based access control must enforce data visibility and permissions: agents see only assigned segments, supervisors see all cases.

Business Rules / Data Dependency: Enforced by Okta; role mapping validated quarterly; audit logs maintained for compliance.

FR-6

Description: System must implement retry logic and caching for CRM API calls to mitigate latency and ensure data consistency.

Business Rules / Data Dependency: API calls retry up to 3 times with 5-minute intervals; cached data used if API fails; cache invalidated after 1 hour.

FR-7

Description: Case resolution must be validated against knowledge base metadata to ensure accuracy and consistency.

Business Rules / Data Dependency: Requires knowledge base versioning metadata; resolution logged with KB version; flagged if outdated KB used.

FR-8

Description: System must support real-time synchronization of onboarding status across Salesforce, Okta, and Segment.

Business Rules / Data Dependency: Data syncs every 15 minutes; failure triggers alert to Platform Engineering; logs maintained for audit purposes.