Client

Saithru

Problems

> Sales spike led large backlog of onboarding projects
> Lack of standards on use of newly introduced project management systems
> No agreement on what made a "successful" onboarding project

Project Gestalt Scope

> Onboarding/integration project management
> Voice of the customer analysis
> Process improvement participant

Technologies

Atlassian Confluence and Jira; client-facing Project Implementation Plan in Google Sheet; Sailthru REST APIs, JSON

Solution

Omni-channel marketing company Sailthru was experiencing tremendous growth. A sales spike created a daunting new customer onboarding requirement. Project Gestalt's Neil Jacobson was brought in to help harmonize and formalize the onboarding approach, develop a PM training and ramp up process, and to augment Sailthru's project managers as they prepared for and addressed the unprecedented number of new client onboarding/integrations projects.

Working as a PM, Neil led client/Sailthru teams through setup, configuration and integration of Sailthru's omni-channel marketing platform with clients' media and ecommerce sites. Neil handled 26 onboarding projects over a 10-month period—up to 15 projects concurrently—coordinating access to Sailthru's delivery, engineering, analytics and customer success teams while providing hands-on configuration and testing, input on setup and integration using Sailthru REST APIs, and operational support during implementation period.

Neil advanced the team's use of Atlassian Confluence for project documentation, and Confluence task management to better manage client and Sailthru actions during the onboarding project. He also streamlined meeting recap distribution using Confluence template and task functionality.

Neil led a "voice of the customer" analysis to help Sailthru better understand Sailthru customers' and internal customers' expectations and requirements for the onboarding process. A key finding was the lack of agreement on what the onboarding project was to deliver and how participants and customers measured success. This led to development of a more detailed Scoping process during Sales to define in-scope work/out of scope work, detail work required from the customer, and to formally define an onboarding schedule. The new scoping process was piloted and adopted.

PROJECT GESTALT