



## A global tech company tightens up the onboarding of customers from newly acquired SaaS products

Deloitte Business Process Enablement Services & Industry Solutions

*A technology giant's journey*

### The challenge

This global company focuses on technology and innovation. Its pioneering solutions empower businesses of all sizes, as well as individuals, to enhance productivity, drive efficiency, and foster creativity. The company has a long-standing history of introducing cutting-edge technology to drive the next wave of technological progress, shaping the future of digital transformation. The company recently acquired several software-as-a-service (SaaS) products. These products collectively had a few

thousand customers who needed to be transitioned from their legacy support systems to the support provided by this company for a mainstream cloud platform.

However, data hygiene in the acquired companies was often subpar, making some of the customer information unreliable. The only certainty was the shutdown date of the legacy support for each product. By that time, all customers needed to be fully transitioned—on budget and without incident.

### A complex situation

One complicating factor was that each type of customer required a different transition strategy and timeline. Existing customers could only be transitioned upon contract renewal. Net new customers had to be onboarded immediately after the deal was closed. Additionally, customers who had purchased their product from a third party could only be onboarded through the third-party partner. However, these third-party partners often had other priorities.



Billing presented another challenge. Fees varied based on the level of support provided. Charging policies also differed depending on where the product was purchased, which cloud service the subscription was for, and what partner program was involved.

Adding to the complexity, much of the customer contact information inherited from the acquired companies was either missing or incorrect. Data integration was inconsistent across the various systems involved. The company had sent each customer a promo code to encourage them to cooperate with the transition, and these promo codes needed to be tracked as well. If the customer remained unwilling to pay for support, a no-cost option would have to be provided in alignment with technical setting and billing policy.

### Wrangling the details

The solution required significant internal diplomacy and collaboration. Recognizing this, Deloitte team members dispersed out across the company organization, working with stakeholders in sales, renewals, billing, partner operations, legal, engineering, systems, products, and onboarding.

Together, Deloitte and the company teams developed a comprehensive transition strategy that aligned with one of the company's key strategic objectives: customer centricity. From there, we created various mitigation plans. For example, one plan addressed discontinuing legacy support, providing clear instructions for customers on how to regain support.

Based on these plans, Deloitte redesigned processes to achieve optimal efficiency and effectiveness. We paired the new processes with FAQs and playbooks to guide project teams and stakeholders. Additionally, we simplified customer communication templates, using product banners to remind customers about onboarding. Finally, we worked with the client to implement special transition plans

in place that minimized the impact on each customer cohort and aligned with any legacy commitments.

To enhance data quality, the Deloitte team implemented measures such as cross-verification of data across systems, correction of issues in ERP extract queries, and refinement of ERP extract filters and fields. We then established onboarding metrics, quotas, performance measures, burndown charts, and reports to monitor the onboarding process and address the root causes of low onboarding rates and efficiency.

### Results

Once the pieces were in place, the company saw rapid improvement. Customer onboarding rates increased as much as 80%, depending on the product. Simultaneously, customer engagement rates rose from 20% to 70%.

As a result of these business process improvements, the company can seamlessly integrate future SaaS acquisitions while reducing the cost of maintaining their legacy support systems. Enhanced data accuracy and quality set the stage for customer and product insights, revealing further opportunities for improvement. Additionally, for future support, the company now has the ability to tap into a team of Deloitte professionals who are intimately familiar with the company's systems, organizational structure, and culture.

### About Deloitte Business Process Enablement Services & Industry Solutions

Deloitte Business Process Enablement Services & Industry Solutions deliver management of critical business processes with AI solutions and market-differentiated assets. The work we deliver includes:

- Business process services
- Legal operations
- Customer data management
- Experience management as a service (IS&PE)
- Finance and accounting transformation and operations
- Data DevOps

Our services include data analytics as-a-service with continuous support for interactive applications.

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