



CONSULTING PORTFOLIO

Business Transformation & Technology Consulting

CASE STUDIES

Complete Portfolio — Volumes I, II & III

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Frameworks, diagrams, and methodologies presented here reflect the author's own consulting approach and professional judgment at the time of each engagement. They are shared for portfolio and demonstration purposes and aren't a substitute for engagement-specific professional advice.

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How to Use This Portfolio

This book started as three separate case study documents, written at different points in the same consulting practice. Combining them into one volume does more than tidy up the formatting. A single write-up gets read once and filed away; a combined portfolio gets pulled back out, chapter by chapter, whenever the next application or proposal needs evidence instead of a claim.

A portfolio like this earns its keep in more places than a résumé line ever could. A hiring manager reading it sees how a candidate actually thinks, not just which titles they've held; a prospective client handed the same pages before a kickoff call starts the relationship from a shared vocabulary instead of a sales deck. It works inside a proposal as evidence of method rather than a promise of one, and it works mid-interview, when "tell me about a time you redesigned a broken process" needs an answer with more behind it than a good anecdote. Over time, chapter by chapter, it turns into the raw material for writing that's grounded in delivered work instead of borrowed frameworks.

The three volumes can be read in order or opened individually. Volume I covers business intelligence and analytics engagements. Volume II is a go-to-market portfolio built with ProspectWise for Ignite Solutions. Volume III spans delivery excellence, product strategy, and enterprise transformation, closing with a reusable consulting playbook. Every chapter follows the same shape: challenge, approach, outcome, lessons learned, and a short personal note. Read the whole book, or open straight to the one case study that answers the question in front of you.

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Portfolio Executive Summary

This portfolio compiles fifteen chapters across three volumes, spanning business intelligence, go-to-market strategy, and product and platform delivery. Read together, they trace a single consulting practice applied to problems as different as executive revenue dashboards, a B2B demand-generation system, and the architecture behind an AI-enabled learning platform.

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Practice Domains Covered

- **Business Intelligence & Analytics** — *Chapters 2–3*
- **Workforce & People Analytics** — *Chapter 4*
- **Go-to-Market Strategy** — *Chapters 5–9*
- **CRM & Process Automation** — *Chapters 10–11*
- **Product Strategy & Delivery** — *Chapters 12–13*
- **AI Architecture & Governance** — *Chapter 14*

Every chapter follows the same shape: an executive summary, the business challenge, the approach taken, a supporting diagram or exhibit, measurable outcomes, lessons learned, and a short first-person consultant's note. The book can be read start to finish, or opened directly to the one case study most relevant to the conversation at hand.

♦ PART ONE

Volume I

Business Transformation & Technology Consulting

Four case studies in business analysis, revenue intelligence, and workforce analytics: the analytical foundation the rest of this portfolio builds on.

- Executive Profile
- Enterprise Revenue Intelligence Platform
- Revenue Risk Forecasting Platform
- Workforce Analytics & Resource Planning

VOLUME I • CHAPTER 1

Chapter 1 — Executive Profile

Who I am and how I work

EXECUTIVE SUMMARY

This opening chapter sets up everything that follows: a working philosophy for turning business ambiguity into technology that scales, a five-phase methodology applied the same way on every engagement, and a set of capabilities spanning analysis, product thinking, and delivery leadership.



Professional Philosophy

I turn business problems into technology that actually gets used, by pairing the analyst's job of mapping what's really happening with the builder's job of shipping something that works. Frameworks are useful until they become the point of the engagement instead of the business outcome; I'd rather hand a team the plainer solution they'll actually run than the elegant one they'll quietly route around.

That combination of an analyst's rigor and a builder's instinct to ship something runs through every case study in this book, whether the deliverable was a revenue dashboard, a go-to-market system, or an AI-enabled product architecture.



Consulting Methodology

Every engagement in this portfolio follows some version of the same five-phase approach, regardless of the domain:

- Business Discovery & Stakeholder Workshops
- Requirements Engineering & Process Mapping
- Solution Design & Technology Evaluation
- Implementation Planning & Agile Delivery
- Measurement, Optimization & Continuous Improvement

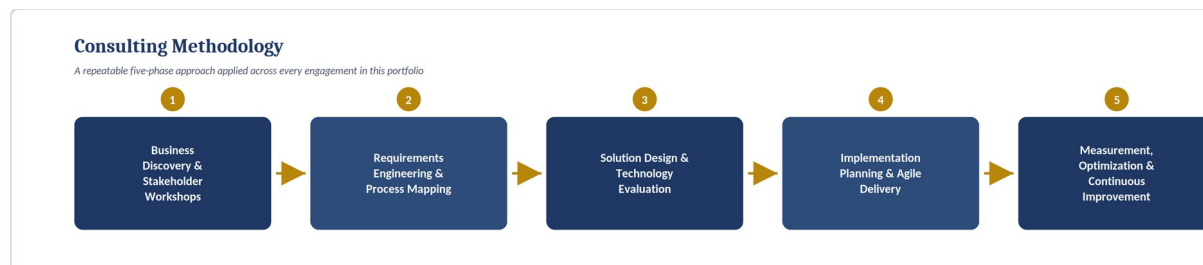


Figure 1.1 — The five-phase consulting methodology applied across this portfolio



Core Capabilities

- Business Analysis & Requirements Engineering
- Product Strategy & Roadmapping
- Digital Transformation & Change Leadership

- Business Intelligence & Executive Dashboard Design
- Workflow Automation & Process Re-engineering
- CRM Transformation & Revenue Operations
- AI-Enabled Solution Architecture
- Agile Project & Delivery Management



LESSONS LEARNED

- A methodology only earns its place if it survives contact with a genuinely messy stakeholder situation. The five phases above are less a checklist than a discipline for staying oriented once priorities shift mid-engagement.
- The most useful thing a Business Analyst can do in the first two weeks of any engagement is resist the urge to propose a solution before the current-state process is fully mapped.



CONSULTANT'S NOTE

I trained as a comparative literature student before I became a business analyst, and I don't think that's incidental to how I work. Close reading, sitting with a text until its actual structure reveals itself instead of the structure you expected, turns out to be exactly the skill a messy stakeholder interview demands. The methodology in this chapter is really that instinct formalized.

KEY CONSULTING SKILLS DEMONSTRATED Stakeholder Management • Business Analysis • Product Strategy • Delivery Leadership

VOLUME I • CHAPTER 2

Chapter 2 — Enterprise Revenue Intelligence Platform

Business Intelligence & Executive Reporting



EXECUTIVE SUMMARY

Leadership lacked a unified, real-time view of revenue performance, utilization, and delivery health. This engagement replaced fragmented manual reporting with a governed, automated executive reporting layer built on SQL, BigQuery, and Looker Studio.



Business Challenge

Reporting was assembled by hand from disconnected spreadsheets, and every analyst kept a slightly different version of the truth. Two people looking at "this quarter's revenue" in the same meeting could easily be looking at two different numbers, refreshed on two different days, built on two slightly different rules for what counted.



Discovery & Approach

Work began with stakeholder interviews to pin down exactly what executive reporting needed to answer, and which KPIs actually drove decisions rather than simply being available to look at. Current-state reporting processes were mapped end to end, pain points were logged, and success criteria were defined in terms leadership would actually recognize as "solved."

- Conducted stakeholder interviews to define reporting requirements and executive KPIs
- Mapped business processes and designed future-state reporting workflows
- Defined data models spanning SQL and BigQuery, feeding executive dashboards built in Looker Studio
- Automated reporting workflows to improve visibility and reduce manual effort

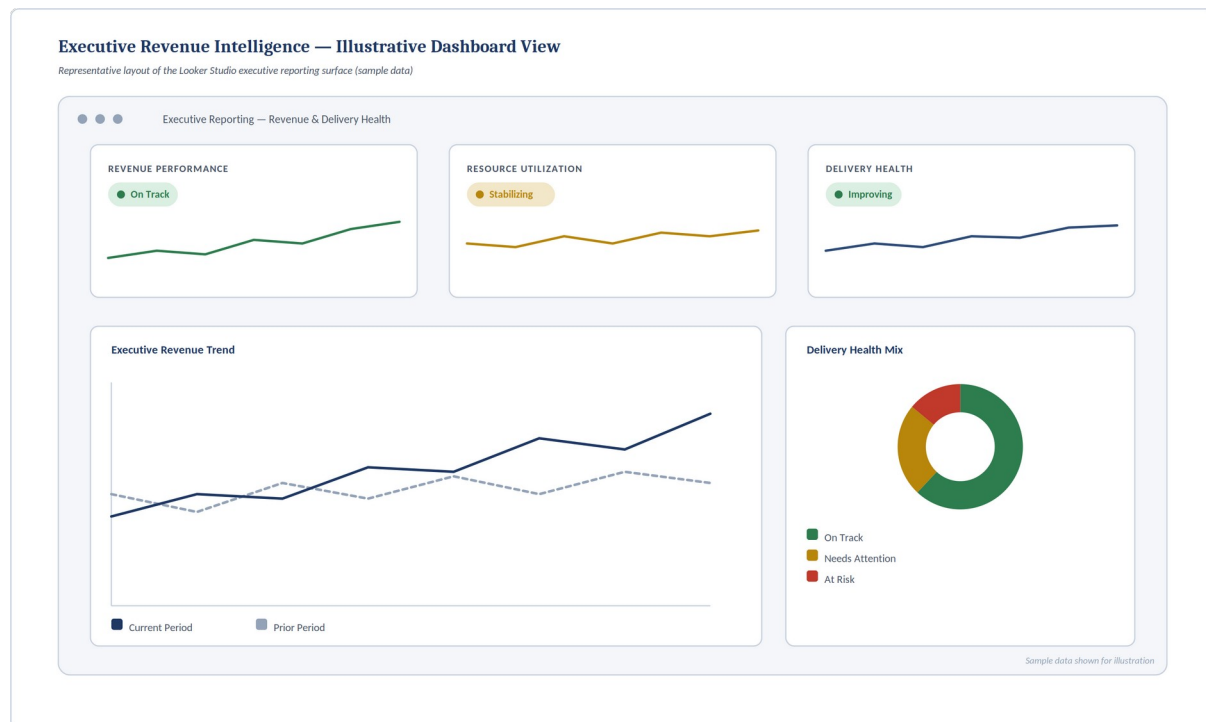


Figure 2.1 — Illustrative executive dashboard layout (sample data, representative of the Looker Studio reporting surface)

Business Outcomes

- Improved executive decision support through centralized, single-source-of-truth reporting
- Enabled proactive revenue monitoring and stronger operational governance
- Recovered revenue that the old spreadsheet reporting had been quietly losing track of
- Cut manual reporting effort and turnaround time, freeing analysts to spend their week on analysis instead of data assembly
- Established a reusable analytics architecture, SQL feeding BigQuery feeding Looker Studio, that later reporting projects could build on directly



LESSONS LEARNED

- A dashboard is only as trustworthy as the data model underneath it. Most of the actual effort in this engagement went into agreeing on definitions, long before a single chart got built.
- Automating a report doesn't just save time; it removes the quiet, cumulative risk of every analyst maintaining a slightly different version of "the numbers."
- Executive buy-in came less from the visuals and more from the fact that, for the first time, everyone in the room was looking at the same figure.

**CONSULTANT'S NOTE**

The unglamorous part of this project was reconciling three different definitions of "active client" across three teams, and it took longer than building the dashboard itself. That's usually where the real value in a BI engagement hides: not in the chart, but in the argument you have before the chart gets built.

KEY CONSULTING SKILLS DEMONSTRATED Stakeholder Management • Requirements Gathering • Business Intelligence • Dashboard Design • Executive Reporting

VOLUME I • CHAPTER 3

Chapter 3 — Revenue Risk Forecasting Platform

Predictive Risk Monitoring



EXECUTIVE SUMMARY

Revenue risks were being surfaced only after they had already hit commercial results. Building on the reporting architecture from Chapter 2, this engagement moved risk visibility upstream, from a reactive post-mortem to an early warning system.



Business Challenge

Account-level warning signs sat in the data well before anyone noticed them in a quarterly review. Nobody had built a system to go looking for them earlier, so the review cycle was the earliest point anyone was actually checking, by which time the damage had already happened.



Discovery & Approach

This engagement extended the reporting foundation built for the Enterprise Revenue Intelligence Platform rather than starting from scratch, which meant the risk model could plug directly into data pipelines and definitions that leadership already trusted.

- Analyzed operational, customer, and delivery indicators affecting future revenue
- Designed a risk-monitoring framework combining business KPIs with project health metrics
- Created dashboards highlighting accounts requiring proactive intervention
- Worked with stakeholders to align reporting cadence with executive decision-making

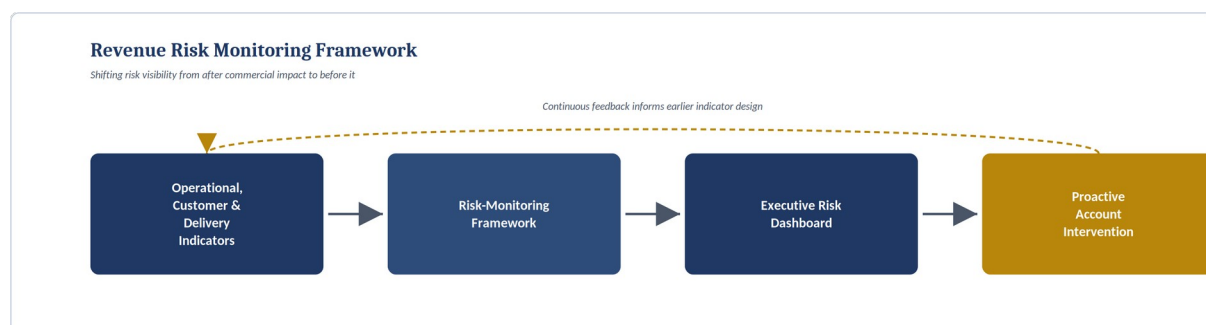


Figure 3.1 — Revenue risk monitoring framework, including the feedback loop back into indicator design



Business Outcomes

- Improved visibility into potential revenue risks before they became commercial problems
- Supported earlier intervention and better account-level planning
- Enhanced executive confidence in forecasting discussions by grounding them in leading, not lagging, indicators



LESSONS LEARNED

- A risk framework earns trust only after it has correctly flagged something before the business already knew it. Until then, it's just another dashboard competing for attention.
- Leading indicators are rarely a single metric; they're a combination that only becomes meaningful once operational, customer, and delivery signals are read together.



CONSULTANT'S NOTE

There's a particular kind of consulting satisfaction in watching a dashboard flag an account as "at risk" three weeks before anyone would otherwise have noticed [CHECK: is this figure real / from source?]. It's a small thing, but it's the difference between a save and a post-mortem, and it's the clearest argument I know for building the boring monitoring layer before you need it.

KEY CONSULTING SKILLS DEMONSTRATED Risk Analysis • Business Intelligence • Dashboard Design • Executive Reporting
• Forecasting

VOLUME I • CHAPTER 4

Chapter 4 — Workforce Analytics & Resource Planning

People Analytics at Enterprise Scale

EXECUTIVE SUMMARY

Leadership needed better visibility into workforce utilization and resource allocation across a large, multi-subsidiary organization. This engagement, internally known as the Talent Web initiative, unified workforce data across roughly 20,000 employees, five subsidiaries, and three separate HRMS platforms into a single reporting layer.



Business Challenge

Leadership needed a single view of the workforce, and none existed. The data lived across three HRMS systems (Infoweb, DarwinBox, and SuccessFactors), each covering a different slice of five subsidiaries and roughly 20,000 employees, and none of the three talked to each other.



Discovery & Approach

Before any dashboard could be designed, the underlying workforce planning processes and reporting gaps had to be documented system by system, since each HRMS platform structured its data differently and reconciliation was the real engineering problem.

- Documented workforce planning processes and reporting gaps across Infoweb, DarwinBox, and SuccessFactors
- Designed utilization, attrition, capacity planning, and resource dashboards spanning all five subsidiaries
- Standardized reporting metrics and definitions for leadership teams across previously siloed systems
- Enabled data-driven workforce planning through automated, cross-system analytics

Table 4.1 — RACI Matrix: Workforce Analytics & Resource Planning

Task / Activity	Business Sponsor	Workforce Lead / HRBP	Business Analyst (Author)	Data Engineering	Department Managers	Executive Leadership
Define Reporting Requirements	A	R	R	C	C	I
Data Source Mapping (3 HRMS)	I	C	R	A	I	I
Dashboard Design & Build	C	C	A/R	R	I	I
Data Validation Across Subsidiaries	I	R	A	R	C	I
Rollout & Manager Training	C	A	R	I	R	I

Task / Activity	Business Sponsor	Workforce Lead / HRBP	Business Analyst (Author)	Data Engineering	Department Managers	Executive Leadership
Ongoing Governance	A	R	C	C	I	I

R Responsible A Accountable C Consulted I Informed

Business Outcomes

- Reduced manual reporting effort across a workforce of roughly 20,000 employees
- Improved workforce planning accuracy by reconciling three previously inconsistent HRMS data sources
- Provided leadership with consistent operational KPIs for the first time across all five subsidiaries



LESSONS LEARNED

- At this scale, the hard problem is rarely the dashboard. It's getting three HRMS systems to agree on what "headcount" means.
- A RACI matrix earns its keep most in exactly this kind of engagement: five subsidiaries and three data owners cannot be aligned by goodwill alone.
- Manager adoption depended more on training and trust-building than on the underlying analytics. The best dashboard in the world doesn't help if managers don't believe the numbers.



CONSULTANT'S NOTE

Reconciling three HRMS systems taught me more about organizational politics than any stakeholder workshop could have. Each system's "owner" had a reason their definition of the data was the right one, and usually they were all a little bit right. The job wasn't to declare a winner; it was to build a translation layer everyone could trust.

KEY CONSULTING SKILLS DEMONSTRATED Workforce Analytics • Data Reconciliation • RACI Governance • Dashboard Design • Change Management

♦ PART TWO

Volume II

ProspectWise × Ignite Solutions — Go-to-Market Strategy

Five case studies tracing a complete B2B demand-generation system built for Ignite Solutions' US market entry, from buyer research through competitive positioning.

- Buyer Journey Architecture
- Messaging Architecture
- Content Strategy Engine
- Competitive Positioning
- Strategic Synthesis & Portfolio Lessons

VOLUME II • CHAPTER 5

Chapter 5 — Buyer Journey Architecture

Mapping Awareness, Not Just Funnel Stage

EXECUTIVE SUMMARY

This chapter examines how ProspectWise designed a five-stage buyer journey for Ignite Solutions' US market, organizing two distinct ICP segments around buyer psychology instead of a generic vendor funnel.



Business Challenge

Ignite Solutions needed a go-to-market motion built around where buyers actually were in their thinking, not around the assumption that every prospect walks in already searching for a vendor. Two distinct ICP paths existed inside the same market, and they needed different messaging emphasis at different points.



Approach & Key Concepts

The journey runs across five awareness stages, from Problem Unaware through Most Aware, with two ICP paths layered on top. Segment A is stuck in demo purgatory, sitting on a production AI initiative that never shipped; Segment B is actively building toward production and trying to get there faster.

- Five awareness stages from Problem Unaware to Most Aware
- Two ICP paths: Segment A (stuck in demo) and Segment B (building toward production)
- Brand visibility calibrated to increase with buyer awareness rather than relying on aggressive early-stage promotion



Figure 5.1 — Five-stage buyer journey map with illustrative ICP segment emphasis



Business Impact

- Aligned messaging with buyer psychology instead of a generic vendor funnel
- Improved educational positioning for early-stage, less-aware prospects
- Increased campaign relevance by matching content to the buyer's actual awareness stage rather than a one-size-fits-all pitch



LESSONS LEARNED

- A funnel built around the vendor's sales stages and a journey built around the buyer's awareness are not the same artifact. Conflating the two is the most common go-to-market mistake I see.
- Two ICP segments that look similar on a firmographic filter can need almost opposite messaging if one is recovering from a failed pilot and the other has never tried.



CONSULTANT'S NOTE

Segment A, the "stuck in demo" buyer, was the more interesting design problem of the two. They don't need convincing that production AI is possible; they need convincing that this time will be different from the last vendor who told them the same thing. That's a trust problem, not an awareness problem, and it changed how early-stage content for that segment got written.

KEY CONSULTING SKILLS DEMONSTRATED **Buyer Research • ICP Segmentation • Journey Mapping • Positioning Strategy**

VOLUME II • CHAPTER 6

Chapter 6 — Messaging Architecture

From Positioning to Proof

EXECUTIVE SUMMARY

The messaging system translates research into positioning, value propositions, and objection handling, giving Ignite Solutions a repeatable framework that keeps every campaign, ad, and sales conversation consistent.



Business Challenge

Positioning language existed, but it wasn't yet structured into something a sales team, an ads manager, and a content writer could all pull from consistently. Without a shared architecture, every channel risked drifting into its own version of the pitch.



Approach & Highlights

The architecture starts from a single core positioning statement and branches into audience-specific value hierarchies, each backed by its own proof mechanisms and objection map.

- Core positioning built around production AI reliability, not generic AI capability claims
- Separate value hierarchies for enterprise buyers and founder-led buyers
- Proof mechanisms, supporting claims, and objection mapping built underneath each hierarchy

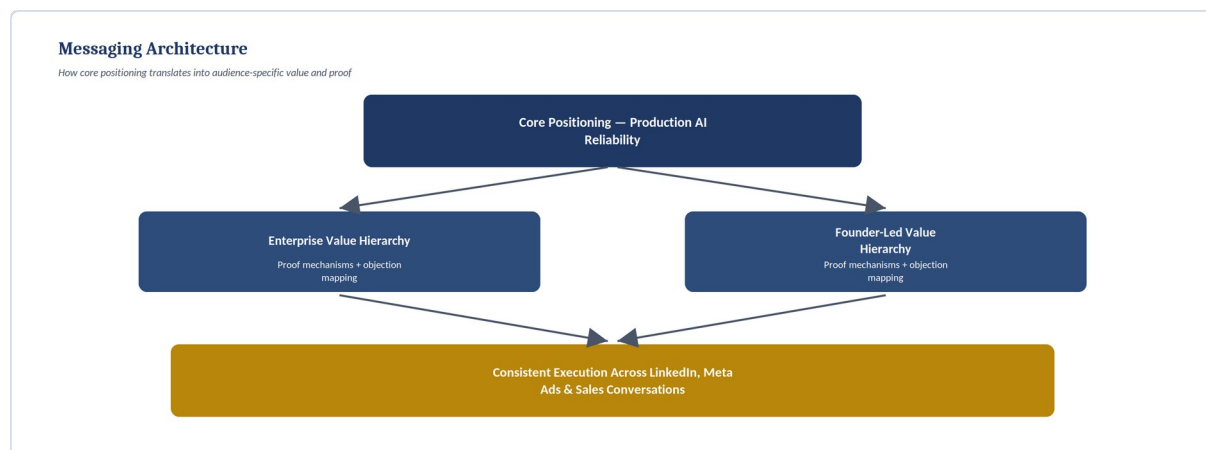


Figure 6.1 — Messaging architecture, from core positioning to channel execution



Outcome

- A repeatable messaging framework that keeps campaigns consistent across LinkedIn, Meta Ads, and live sales conversations
- Reduced messaging drift between marketing and sales, since both were now drawing from the same underlying architecture

**LESSONS LEARNED**

- "Production AI reliability" as a positioning anchor did more work than any feature list. It gave every downstream message a single test to pass.
- Enterprise and founder-led buyers don't just prefer different tone; they weigh proof differently, which is why the value hierarchies had to genuinely branch rather than just being reworded.

**CONSULTANT'S NOTE**

The founder-led branch was, honestly, more fun to write: less caveat, more direct. But the discipline of building both branches from the same root positioning statement is what kept the whole system from splintering into two different companies' worth of messaging.

KEY CONSULTING SKILLS DEMONSTRATED **Messaging Strategy • Positioning • Value Proposition Design • Objection Handling**

VOLUME II • CHAPTER 7

Chapter 7 — Content Strategy Engine

An Editorial Operating System

EXECUTIVE SUMMARY

The social content engine converts strategic research into an editorial operating system: a LinkedIn-first content program built around long-term authority instead of short-term promotion.



Business Challenge

Ignite Solutions needed a content operation that could run consistently without every post being a one-off creative decision, while still sounding like a founder rather than a brand account.



Approach & Highlights

Rather than a content calendar of disconnected topics, the engine was built around five structural components that determine what gets written, in what voice, and when it gets published.

- Five content pillars anchoring every piece of content to a strategic theme
- Threaded content tracks that let a single idea develop across multiple posts over time
- A founder-led voice architecture that keeps content sounding like a person, not a brand
- A funnel-aware publishing cadence, so early-awareness and late-awareness content are deliberately balanced

Content Strategy Engine

Strategic research converted into a repeatable, funnel-aware editorial system

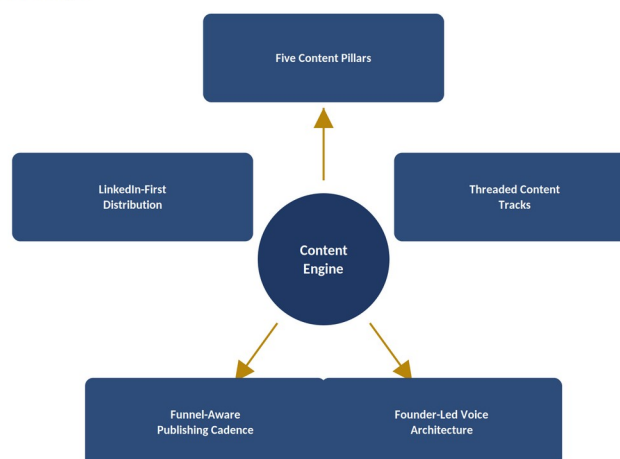


Figure 7.1 — Content strategy engine: research converted into a repeatable editorial system



Outcome

- A scalable LinkedIn-first content engine focused on long-term authority instead of short-term promotional bursts

- A repeatable editorial process that reduced the creative burden of deciding "what do we post this week" from scratch



LESSONS LEARNED

- Threaded content tracks matter more than any individual post. Audiences build trust in a narrative that develops over weeks, not in a single viral hit.
- A founder-led voice can't be delegated to a content calendar template; the architecture has to leave room for genuine point of view.



CONSULTANT'S NOTE

The five-pillar structure looks simple on paper, but the actual discipline is in saying no to a good post idea that doesn't fit any pillar. That's the part of content strategy nobody enjoys and most teams skip, which is exactly why most company content feels scattered.

KEY CONSULTING SKILLS DEMONSTRATED **Content Strategy • Editorial Systems • Founder Branding • Funnel-Aware Publishing**

VOLUME II • CHAPTER 8

Chapter 8 — Competitive Positioning

Honest Differentiation, Not Slogans



EXECUTIVE SUMMARY

ProspectWise mapped Ignite Solutions against traditional consultancies, AI studios, no-code platforms, and in-house alternatives, giving the sales team a structured, honest comparison framework for discovery calls.



Business Challenge

Sales conversations were relying on ad-hoc competitive comparisons that varied by rep and by call. Prospects evaluating Ignite Solutions against consultancies, AI studios, and in-house builds needed a consistent, defensible answer to "why not just do this ourselves?"



Approach & Highlights

The positioning map plots alternatives across two axes, strategic depth and production reliability, rather than relying on a feature-by-feature comparison, which tends to favor whoever wrote the chart.

- Positioning built around strategic depth, production reliability, and engagement model
- Honest competitor comparisons rather than dismissive or exaggerated claims
- Clear differentiation anchored in senior-led production AI engineering



Figure 8.1 — Illustrative competitive positioning map

Outcome

- Sales teams received a structured comparison framework usable directly in discovery calls and objection handling
- Positioning became defensible under scrutiny because it was built on honest trade-offs rather than one-sided claims



LESSONS LEARNED

- A competitive map that only ever makes the competition look bad stops being useful the moment a sophisticated buyer tests it. Honesty about where alternatives genuinely win is what makes the rest of the map credible.
- "Strategic depth" and "production reliability" turned out to be a more useful pair of axes than price or feature count, because they mapped to what buyers actually said they were afraid of.



CONSULTANT'S NOTE

The most persuasive line in the whole positioning brief wasn't a claim about Ignite. It was an honest concession about where a traditional consultancy is genuinely the better choice. Buyers trust the map more once you've shown them you're not trying to win every quadrant.

KEY CONSULTING SKILLS DEMONSTRATED **Competitive Analysis • Positioning Strategy • Sales Enablement • Market Mapping**

VOLUME II • CHAPTER 9

Chapter 9 — Strategic Synthesis & Portfolio Lessons

Closing Volume II

EXECUTIVE SUMMARY

The combined deliverables across Chapters 5 through 8 demonstrate an end-to-end go-to-market strategy: ICP research, messaging architecture, buyer journey, content strategy, and competitive positioning working as one integrated system rather than five disconnected documents.



Strategic Synthesis

No single deliverable in Volume II works in isolation. The buyer journey from Chapter 5 defines who the messaging in Chapter 6 needs to reach at each stage; the messaging architecture defines what the content engine in Chapter 7 is allowed to say; and the competitive positioning in Chapter 8 supplies the proof points that both messaging and content lean on when a prospect starts asking harder questions.

- ICP Research
- Messaging Architecture
- Buyer Journey
- Content Strategy
- Competitive Positioning

Strategic Synthesis — Integrated GTM System

Five workstreams converging into one coherent go-to-market motion

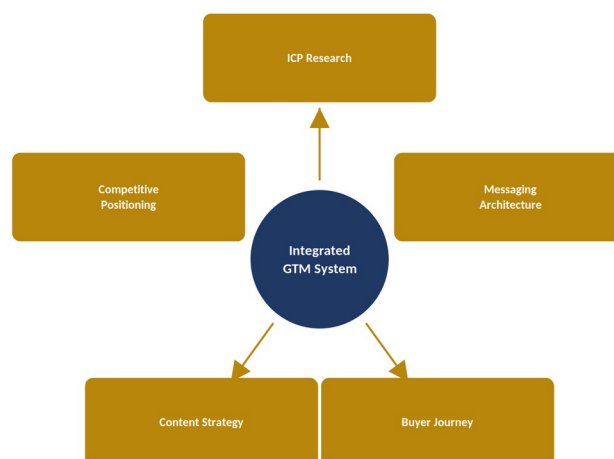


Figure 9.1 — Five workstreams converging into one integrated go-to-market system



Key Consulting Lessons

- Research before messaging: every downstream document was built on the ICP and buyer-journey research, not the other way around

- Match content to awareness: the same claim lands differently depending on where the buyer is on the journey
- Differentiate with capability, not slogans: the competitive map earned trust by being honest, not by being flattering
- Use evidence-based positioning: every value claim in the messaging architecture traces back to a proof mechanism
- Build reusable strategic assets: every artifact in this volume was designed to be referenced again, not used once and discarded



LESSONS LEARNED

- This volume illustrates how multiple strategic documents integrate into a coherent B2B demand-generation system. The individual chapters are useful on their own, but the real value is in how tightly they interlock.



CONSULTANT'S NOTE

Writing this synthesis chapter after the fact was clarifying in a way the individual workstreams weren't. It's easy to lose sight of the throughline when you're deep in a single deliverable. Stepping back to see the whole system is its own kind of consulting work, and it's usually the first thing skipped.

Source: This portfolio volume was synthesized from ProspectWise's strategy documents for Ignite Solutions, including ICP Research, Buyer Journey Research, Messaging Architecture, Content Strategy & Pillar Architecture, and the Competitive Positioning Brief.

KEY CONSULTING SKILLS DEMONSTRATED Go-to-Market Strategy • Strategic Synthesis • Systems Thinking • Portfolio Design

♦ PART THREE

Volume III

Delivery Excellence, Product Strategy & Enterprise Transformation

Six case studies spanning CRM transformation, workflow automation, AI product architecture, and a closing consulting playbook that ties the entire portfolio together.

- Enterprise CRM Transformation & Revenue Operations
- Workflow Automation & Digital Operations Engineering
- Product Discovery & Product Strategy
- Requirements Engineering & MVP
- AI Product Architecture
- Consulting Playbook

VOLUME III • CHAPTER 10

Chapter 10 — Enterprise CRM Transformation & Revenue Operations

Redesigning the Customer Lifecycle



EXECUTIVE SUMMARY

CRM transformation meant redesigning the customer lifecycle end to end: proposal automation, reporting, governance, and the handoff between sales and delivery, replacing a patchwork of manual steps with a standardized operating model.



Business Challenge

Sales-to-delivery handoffs were inconsistent, proposals were built manually for every deal regardless of similarity to past work, and reporting on pipeline health depended on whoever happened to update the CRM most recently.



Approach & Methodology

The redesign treated the customer relationship as a closed loop rather than a linear funnel: acquisition, delivery, and renewal feeding back into each other instead of ending at the close.

- Standardized CRM workflows across the full lead-to-renewal lifecycle
- Automated proposal generation to remove repetitive manual assembly
- Centralized reporting so pipeline and forecasting drew from one governed source
- Improved sales-to-delivery handoff discipline through defined ownership at each stage

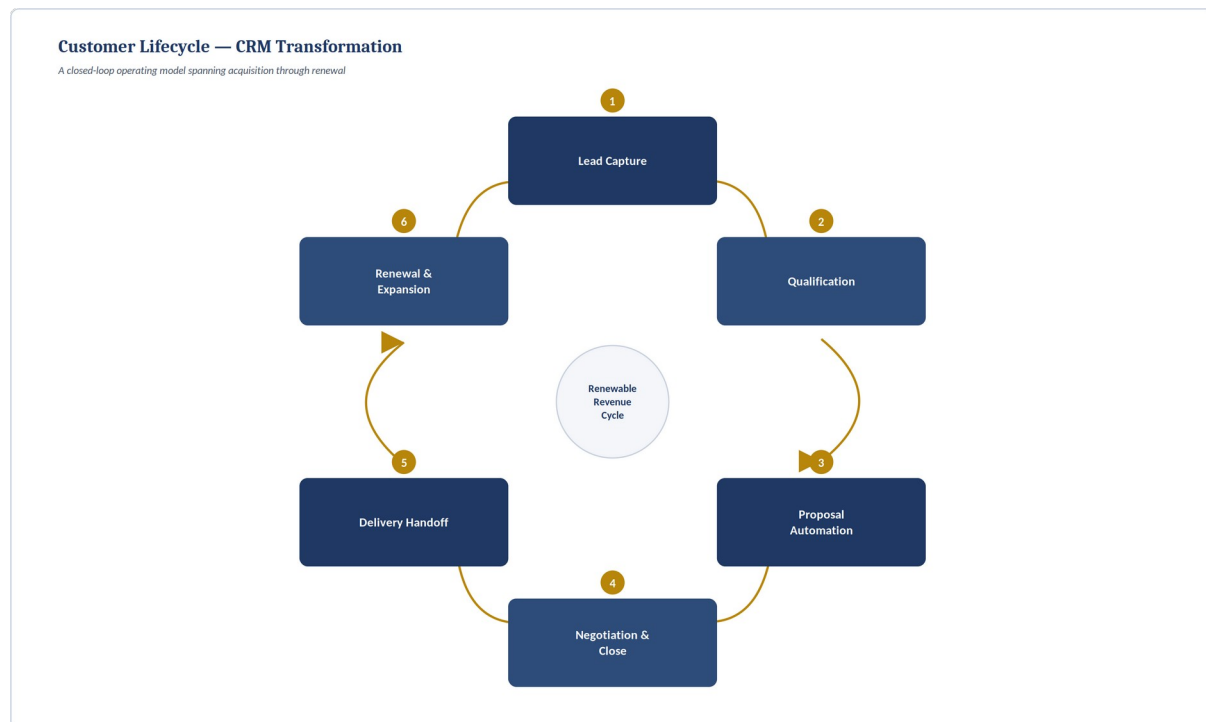


Figure 10.1 — Customer lifecycle redesigned as a closed-loop operating model

Table 10.1 — RACI Matrix: CRM Governance & Revenue Operations

Task / Activity	Sales Leadership	RevOps / Business Analyst (Author)	Delivery / CS Team	Marketing	Finance
CRM Workflow Design	A	R	C	C	I
Proposal Template Governance	C	A/R	C	R	I
Reporting & Forecasting Standards	A	R	C	I	C
Data Quality Standards	C	A/R	R	C	I
System Administration	I	A	C	I	I

R Responsible A Accountable C Consulted I Informed

Key Outcomes

- Standardized CRM workflows across the full customer lifecycle
- Automated proposals, reducing manual assembly time on repeat-pattern deals
- Centralized reporting and better forecasting confidence
- Scalable revenue operations no longer dependent on individual reps' habits



LESSONS LEARNED

- A CRM redesign fails or succeeds on adoption, not architecture. The cleanest workflow in the world doesn't help if reps route around it.
- Treating renewal as the start of the next cycle, not the end of the last one, changed how the whole lifecycle was instrumented.



CONSULTANT'S NOTE

The proposal automation piece looked like the least interesting part of this engagement going in, and turned out to be the one that most changed how the sales team spent their week. Sometimes the highest-impact fix is also the most boring one to describe in a case study.

KEY CONSULTING SKILLS DEMONSTRATED CRM Strategy • Revenue Operations • Process Standardization • RACI Governance

VOLUME III • CHAPTER 11

Chapter 11 — Workflow Automation & Digital Operations Engineering

From Manual Steps to Rules-Based Systems



EXECUTIVE SUMMARY

Business processes were analyzed and redesigned into standardized, automated workflows, including a direct migration of a core project tracking process from manual spreadsheets to a governed SaaS platform.

🎯 Business Challenge

Core operational processes, including central project tracking, were running on manually maintained spreadsheets. This created version-control risk, made cross-team visibility difficult, and put institutional knowledge in individual files instead of a shared system.

🔧 Methodology

The redesign followed the standard automation lifecycle: discovery, process mapping, business rules, automation build, testing, deployment, and a continuous-improvement loop afterward. One concrete result was leading the migration of the central project database off Google Sheets and onto a governed SaaS platform.

- Discovery and current-state process mapping across manual workflow steps
- Business rules definition to determine what could be safely automated versus what required human judgment
- Automation build, testing, and phased deployment
- Continuous improvement loop to refine rules as edge cases surfaced post-launch

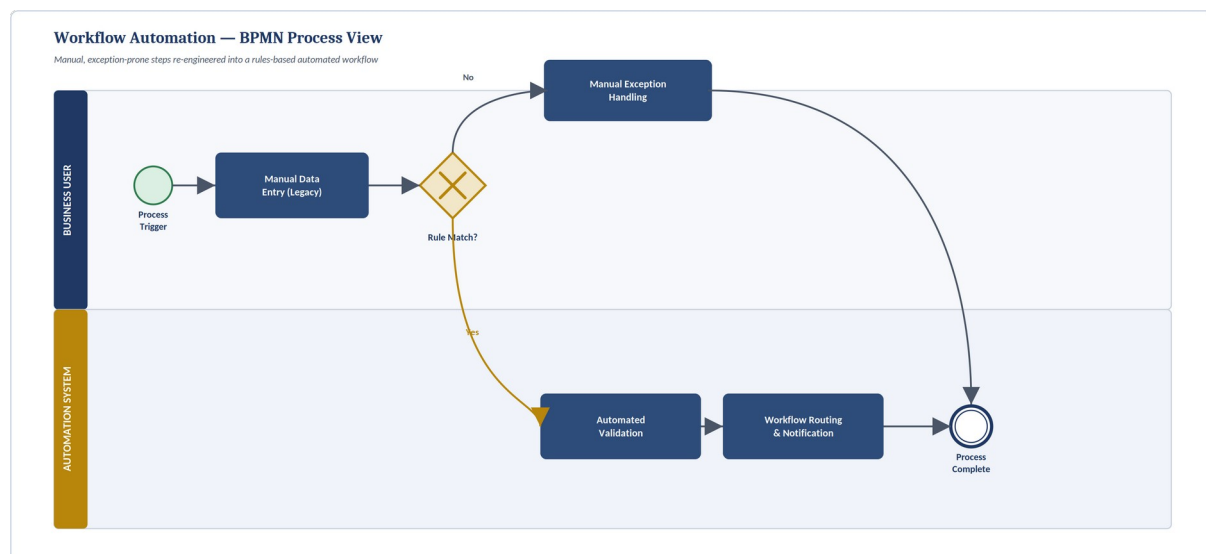


Figure 11.1 — BPMN-style process view: legacy manual step re-engineered into an automated, rules-based workflow

Outcomes

- Reduced manual effort across previously spreadsheet-dependent processes
- Improved data quality by removing manual re-entry and version-control risk
- Faster reporting turnaround once data lived in a governed, queryable system
- Stronger governance through defined ownership and audit trail, replacing informal spreadsheet stewardship



LESSONS LEARNED

- The migration off spreadsheets was less a technology project than a trust project. Teams had informally patched around the old system's gaps for years, and those patches had to be understood before they could be replaced.
- A BPMN-style view of a process, even a simple one, surfaces exception paths that a narrative description quietly glosses over.



CONSULTANT'S NOTE

Every team had a slightly different unofficial workaround for the same broken step in the old spreadsheet process, which meant the real discovery work wasn't mapping the official process. It was mapping the five unofficial ones running underneath it [CHECK: is this figure real / from source?]. That's usually where automation projects actually live or die.

KEY CONSULTING SKILLS DEMONSTRATED **Process Re-engineering • Workflow Automation • BPMN Process Mapping • Change Management**

VOLUME III • CHAPTER 12

Chapter 12 — Product Discovery & Product Strategy

Validating an AI-Enabled EdTech Vision

EXECUTIVE SUMMARY

Market research, personas, jobs-to-be-done analysis, customer journey mapping, and opportunity assessment informed the product strategy for an AI-enabled EdTech platform, validating the product vision and prioritizing a focused MVP before a single line of the build began.



Business Challenge

An early product concept for an AI-enabled learning platform, combining subject-proficiency diagnostics with psychometric and personality assessment, needed to be validated against real user needs before committing engineering resources to a full build.



Approach

Discovery combined qualitative and structural methods: understanding what learners and their guardians were actually trying to accomplish (jobs-to-be-done), mapping how that need moved through a realistic customer journey, and assessing which opportunities were both valuable and buildable within a reasonable MVP scope.

- Market research and persona development for the target learner and guardian segments
- Jobs-to-be-done analysis to separate genuine need from feature wish-lists
- Customer journey mapping across diagnostics, assessment, and reporting
- Opportunity assessment and roadmap planning to sequence what shipped first

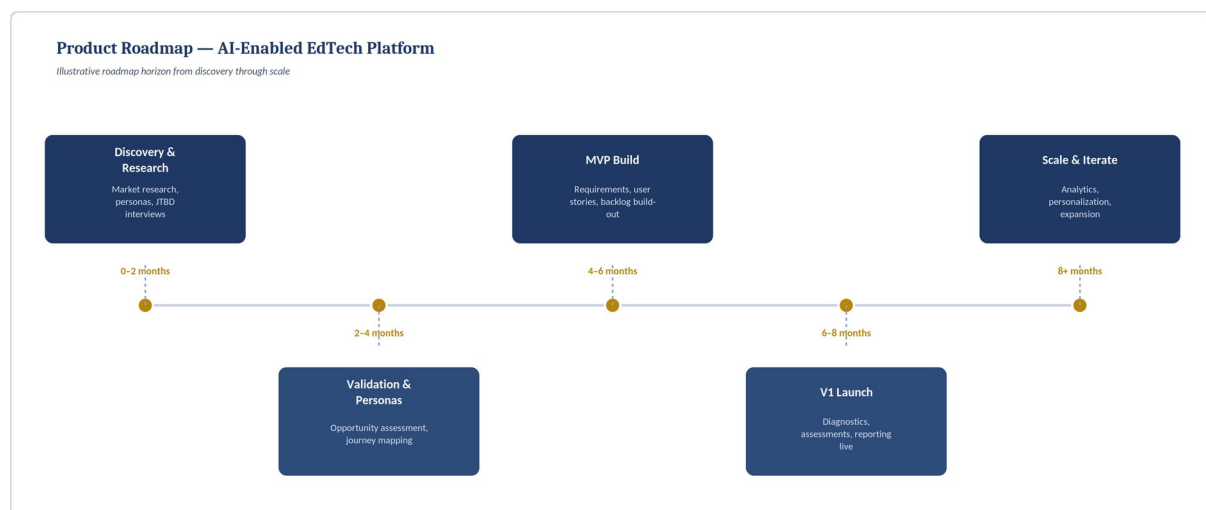


Figure 12.1 — Illustrative product roadmap from discovery through scale



Outcome

- A validated AI-enabled EdTech product vision grounded in real user research rather than assumption

- A prioritized MVP scope covering subject-proficiency diagnostics, Big Five-based personality assessment, and synthesis reporting
- A roadmap sequencing that pushed personalization and analytics features to a later phase, keeping the initial build achievable



LESSONS LEARNED

- Personality assessment via Big Five, with MBTI and DISC treated as derived views rather than separate measurement layers, turned out to be a simpler and more defensible architecture than trying to support three parallel frameworks.
- The MVP scope shrank twice during discovery, both times because a "must-have" feature turned out to serve the product's story more than an actual user need.



CONSULTANT'S NOTE

Building assessment products taught me to be suspicious of my own excitement. The features I was most eager to build were consistently not the ones the jobs-to-be-done interviews actually supported. That gap is worth building into any product discovery process as a standing check.

KEY CONSULTING SKILLS DEMONSTRATED **Product Discovery • Persona Development • JTBD Analysis • Roadmap Planning**

VOLUME III • CHAPTER 13

Chapter 13 — Requirements Engineering & MVP

From Business Need to Execution-Ready Backlog

EXECUTIVE SUMMARY

Business requirements were translated into functional specifications, user stories, backlog items, MVP scope, and an execution-ready roadmap: the bridge between the product strategy in Chapter 12 and an Agile delivery team that could actually start building.



Business Challenge

A validated product vision is not yet a backlog. The gap between "we should build subject-proficiency diagnostics" and a sprint-ready user story with clear acceptance criteria still had to be closed.



Approach

Requirements engineering moved systematically from business need to functional specification to individually estimable user stories, each one small enough to be delivered and tested within a single sprint.

- Business requirements captured directly from product strategy and stakeholder input
- Functional specifications translating requirements into system behavior
- User stories with acceptance criteria, sized for Agile sprint delivery
- Prioritized backlog and MVP scope aligned to the roadmap from Chapter 12

Requirements Engineering to MVP

Translating business requirements into an execution-ready Agile delivery plan

Figure 13.1 — Requirements engineering flow, from business requirement to execution-ready MVP



Outcome

- An execution-ready Agile delivery plan with a fully specified, sprint-sized backlog
- Clear acceptance criteria that reduced rework during development and QA
- A shared vocabulary between product strategy and engineering that held up through the build

**LESSONS LEARNED**

- The discipline of writing acceptance criteria before a story enters the backlog catches ambiguity far earlier, and far more cheaply, than catching it in QA.
- MVP scope discipline has to be actively defended sprint by sprint, not just decided once at kickoff.

**CONSULTANT'S NOTE**

Every requirements document I've written has taught me the same lesson from a different angle: ambiguity you don't resolve on paper doesn't disappear, it just moves downstream and gets more expensive. Writing the story clearly is cheaper than debugging the assumption later.

KEY CONSULTING SKILLS DEMONSTRATED Requirements Engineering • User Story Writing • Agile Backlog Management • MVP Scoping

VOLUME III • CHAPTER 14

Chapter 14 — AI Product Architecture

A Modular, API-First Learning Platform

EXECUTIVE SUMMARY

This chapter documents the architecture behind the Yourclass platform's AI assessment, recommendation, and analytics capabilities: an API-first system built on AWS Amplify, Supabase, and the Claude API, with security and responsible-AI governance designed in from the start rather than added afterward.



Business Challenge

An AI-enabled learning platform combining diagnostics, personality assessment, and synthesis reporting needed an architecture that was modular enough to evolve, secure enough to handle sensitive learner data, and simple enough for a small team to actually operate.



Architecture Approach

The platform is organized into four layers (client, application, data, and intelligence), each with a single clear responsibility and connected through defined API boundaries rather than direct cross-layer coupling.

- Client layer: a React frontend for diagnostics, assessments, and reports, hosted on AWS Amplify
- Application layer: routing and server-side session handling, keeping business logic off the client
- Data layer: Supabase (PostgreSQL) with Row-Level Security enforced on every table
- Intelligence layer: the Claude API powering the assessment engine, recommendations, and analytics



Figure 14.1 — Layered AI product architecture with security and governance controls

Outcome

- A modular intelligent learning platform architecture that can evolve layer by layer without a full rebuild
- Security-by-design: the Anthropic API key never leaves server-side secrets, and answer keys are stripped before any client response
- Row-Level Security enforced on every table, so data access is governed at the database layer, not just the application layer
- A governance boundary ensuring personality assessment scores never feed lead scoring or any commercial use beyond the learner's own report



LESSONS LEARNED

- Deciding early that personality data would never touch lead scoring wasn't just an ethical choice. It also simplified the architecture, because that boundary didn't have to be re-litigated in every later feature discussion.
- Row-Level Security at the database layer is worth the upfront design cost; it means a future application-layer bug can't accidentally expose another learner's data.



CONSULTANT'S NOTE

The decision to strip answer keys server-side before any response reaches the client sounds like a small implementation detail. It's really a governance decision disguised as an engineering one, and it's much easier to build correctly on day one than to retrofit once the platform has real users.

KEY CONSULTING SKILLS DEMONSTRATED AI Product Architecture • API Design • Data Governance • Responsible AI

VOLUME III • CHAPTER 15

Chapter 15 — Consulting Playbook

Closing the Portfolio

EXECUTIVE SUMMARY

This closing chapter compiles the reusable consulting frameworks that recur across every case study in this book: discovery, stakeholder management, requirements engineering, governance, KPI design, and change management. Together they complete the three-volume portfolio from strategy through execution.



The Reusable Toolkit

No single case study in this book uses every framework below, but every framework below shows up in more than one case study. That repetition is the point: a consulting practice built on genuinely reusable methods, rather than one bespoke approach per client, is what makes it possible to move fast on a new engagement without starting from a blank page.

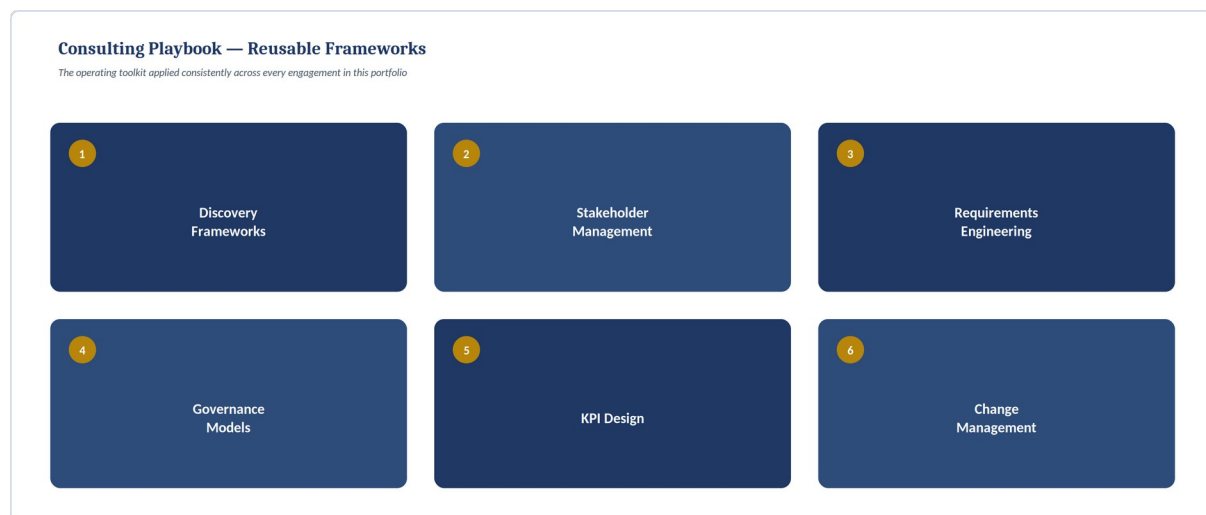


Figure 15.1 — The six-part consulting playbook applied across this portfolio



Conclusion

- **Discovery Frameworks:** structured stakeholder workshops and current-state process mapping, used in every chapter of this book
- **Stakeholder Management:** RACI-based governance and communication planning, most visible in Chapters 4 and 10
- **Requirements Engineering:** from business need to sprint-ready backlog, detailed in Chapter 13
- **Governance Models:** data, security, and decision-rights frameworks, most fully developed in Chapter 14
- **KPI Design:** executive-ready metrics and dashboard design, the throughline of Chapters 2 and 3
- **Change Management:** adoption, training, and rollout discipline, present in nearly every engagement in this portfolio



LESSONS LEARNED

- This completes the three-volume consulting portfolio from strategy through execution: Volume I in analytics, Volume II in go-to-market strategy, and Volume III in delivery and product architecture.
- The through-line across all fifteen chapters is the same five-phase methodology introduced in Chapter 1: discovery, requirements, solution design, implementation, and measurement, applied to problems as different as revenue dashboards and AI product architecture.



CONSULTANT'S NOTE

If there's one thing I'd want a reader to take from this entire book, it's this: the domain changes every chapter (analytics, go-to-market, CRM, product, architecture), but the underlying discipline doesn't. That consistency is deliberate, and it's the actual argument this portfolio is making about how I work.

KEY CONSULTING SKILLS DEMONSTRATED Consulting Frameworks • Governance • KPI Design • Change Management

Appendix — Capability Index

A quick-reference map from core consulting capability to the chapters that demonstrate it: useful for tailoring this portfolio to a specific job application, proposal, or interview conversation.

Capability	Demonstrated In
Stakeholder Management & Discovery	Ch. 1, 2, 4, 5, 10
Business Intelligence & Dashboard Design	Ch. 2, 3
Risk Analysis & Forecasting	Ch. 3
Workforce & People Analytics	Ch. 4
RACI Governance & Cross-Functional Alignment	Ch. 4, 10
Go-to-Market & Positioning Strategy	Ch. 5, 6, 8, 9
Content & Editorial Systems	Ch. 7
Competitive Analysis	Ch. 8
CRM Strategy & Revenue Operations	Ch. 10
Process Re-engineering & BPMN Mapping	Ch. 11
Product Discovery & Roadmapping	Ch. 12
Requirements Engineering & Agile Delivery	Ch. 13
AI Product Architecture & Data Governance	Ch. 14
Consulting Frameworks & Playbook Design	Ch. 1, 15

Closing Note

Every case study in this book began as a real engagement, a real ambiguous problem, and a real set of stakeholders who needed something built, mapped, or explained. If a chapter here answers a question you have about how I work, I'd welcome the conversation.

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