Sales are growing. Delivery needs to keep up.

An illustrative SaaS case study and practical framework menu

For Series A and B B2B SaaS leaders whose implementations require configuration, data, integrations, training and coordinated handoffs.

When every launch needs a rescue, growth gets expensive.

Your team is working hard. Customers still wait. Leaders chase updates, specialists get pulled between projects, and work nobody priced keeps finding its way into delivery. Another dashboard will not fix a process nobody owns.

Nekulak Advisory brings SaaS professional-services and delivery experience together with disciplined continuous improvement: find the constraint, test the cause, assign the action, and make progress visible.

The case: a successful sales motion meets an inconsistent delivery operation

Imagine a Series B software company with strong demand and a growing implementation queue. Sales-to-delivery handoffs vary, data readiness is unclear, and customer success inherits unresolved work. Leaders want predictable delivery without creating another layer of bureaucracy.

This is a hypothetical teaching case, not a real client engagement. All sample findings, measures, targets and actions are illustrative. No performance improvement or commercial result is claimed.

The practical sequence

1. See the complete customer journey.
2. Find the causes behind recurring delays.
3. Test changes with named owners.
4. Run a short management routine.
5. Check results and standardize what works.

Start with the problem that matters. Choose the method because it helps solve that problem.

See where delivery actually stops.

Step 1 / Value stream mapping and a clear customer outcome

Begin with one implementation segment, not every product and customer at once. Define first value with the customer: for this example, a trained user completes a production workflow with validated data and accepts the result.

Illustrative current-state map

Stage	What to observe	Possible friction
Sales handoff	Scope, promises, owner and input completeness	Missing commitments or acceptance criteria
Readiness	Customer data, access and dependencies	Projects enter the queue before inputs exist
Configuration / integration	Work time, wait time, rework and specialist demand	Shared specialist queues
Validation / training	Acceptance evidence and decision turnaround	Unclear sign-off owner
First value / transition	Outcome accepted; remaining work assigned	Launch declared before usable outcome

For each stage, record timestamps, queue age, touch time, owner, entry/exit criteria and rework. Separate elapsed calendar time from staff effort. Segment customer-caused waits and internal delays without using that distinction to dismiss the customer experience.

Evidence before a redesign

Review recent comparable implementations, inspect handoff records, and speak with the people doing the work. A small review generates hypotheses; it does not prove a company-wide pattern. Validate any broader conclusion with a representative sample.

Future-state hypothesis

Introduce a readiness check, a single accountable delivery owner and explicit acceptance criteria. Pilot the new flow on a small comparable cohort. Keep exceptions visible rather than hiding them outside the process.

Method basis: Lean Enterprise Institute, Value Stream Mapping. See source notes on page 6.

Stop fixing the same problem twice.

Step 2 / Root cause analysis, A3 thinking and an action plan

Sample problem statement

Several reviewed implementations begin configuration without validated customer data. Work then stops and specialists revisit the same project. The frequency and business impact must be measured before setting an improvement target.

Test the cause, not the loudest explanation

Use a cause-and-effect discussion to explore process, ownership, capability, systems and customer dependencies. Use Five Whys to deepen the investigation, then verify each proposed cause with records and observation. “The customer was late” is a starting point, not a complete explanation.

Illustrative hypothesis: readiness ownership is absent from the sales-to-delivery handoff, so incomplete inputs are discovered after configuration starts. Test it against delayed and on-time projects. Check competing explanations such as integration complexity and specialist capacity.

A3-style problem-solving summary

Capture the problem, current condition, target, evidence-backed causes, countermeasures, owner, review date and results on one concise working document. Keep assumptions visible. The goal is shared reasoning, not a completed template.

Pilot action	Accountable role	Evidence of completion
Define minimum data-readiness check	Implementation lead	Checklist tested on a sample handoff
Name customer input and sign-off owners	Project lead	Owners acknowledged at kickoff
Create a visible blocked-work queue	Delivery manager	Each blocker has next action and review date
Compare pilot with similar prior work	Operations lead	Baseline, cohort and confounders documented

Each action needs a due date agreed with its owner. Escalate missed dependencies; do not silently reset the clock. Review whether the countermeasure changed the problem, not only whether the action closed.

Make the plan survive Monday morning.

Step 3 / Daily management and a target-versus-actual scorecard

Daily management connects the team's work to a small set of customer outcomes. Keep the meeting short and use it to expose exceptions, assign decisions and clear blockers. Detailed troubleshooting happens afterward with the right people.

A practical operating rhythm

Daily: review blocked work, near-term commitments and decisions needed.
Weekly: review trends, capacity and corrective actions with delivery leadership.
Monthly: confirm whether improvements hold and whether targets still reflect customer needs.

Illustrative bowler: weekly target versus actual

A bowler here means a KPI scorecard with targets, actuals, gaps and accountable actions. The values below are invented examples, not benchmarks or achieved results.

Measure / owner	Target	Actual	Response
Ready at handoff / delivery lead	90%	70% (7/10)	Inspect three incomplete handoffs
Blockers with owner + next action / PM lead	100%	80% (8/10)	Assign two missing owners today
Median first-value days / CS lead	≤30	36 (8 completed)	Review cohort and waiting stages

Define first-value days from the agreed start event to accepted customer outcome. Track open aging separately so unfinished projects do not disappear from the story. Keep segment, time window and sample size visible.

Avoid a green dashboard and an unhappy customer

Pair speed with quality: acceptance failures, rework and early support escalations. Pair utilization with queue age and capacity. Do not improve one metric by shifting work or risk to another team.

Close the loop

Use Plan–Do–Check–Act: agree a test, run it, inspect evidence, then adopt, revise or stop it. Record the decision. Standardize only after the change proves useful in the actual workflow.

Choose the tool that fits the bottleneck.

Framework menu / Core methods and additional options

Core methods reflect Adam's stated experience. Additional options are candidates to assess and adapt for the engagement, not a blanket claim of certification or expertise in every method.

Problem	Core method	Practical output
Delivery waits are invisible	Value stream / process mapping	Current flow, queues and future-state hypothesis
The same failure keeps returning	Root cause analysis + action plan	Tested causes, countermeasures and owners
Actions fade after the meeting	Daily management	Exception board, escalation path and review rhythm
Teams disagree about performance	Target/actual bowler	Defined measures, gaps and accountable actions

Additional methods to assess as needed

Need	Candidate approach	Use with judgment
Clarify who decides	RACI or decision-rights matrix	One accountable owner; avoid paperwork
Define a messy process boundary	SIPOC / service blueprint	Inputs, outputs, customers and handoffs
Reduce repeated variation	Standard work / playbooks	Minimum repeatable steps plus exceptions
Control too much work in progress	Kanban / capacity planning	Visible queue and explicit capacity constraints
Prioritize recurring failures	Pareto / risk assessment	Reliable categories and impact evidence
Test and sustain an improvement	A3 / PDCA	Hypothesis, pilot, evidence and follow-up
Connect work to priorities	Goal-to-metric mapping	A few outcomes with named owners

Do not deploy this entire menu at once. Start with the smallest set that changes a decision or improves the customer's path to value. Specialist statistical, regulatory, security or technical work may require additional expertise.

Get a clear first move. Then build what works.

How an engagement can start

SaaS Onboarding and Delivery Review

Starting at $3,000. Begin with a bounded review of the agreed delivery workflow, the existing review materials and a prioritized 30-day action plan with one completed operating template. The proposal defines the precise scope and inputs.

This guide illustrates possible methods across a broader improvement engagement. It does not add every framework, a workflow map, daily management rollout or hands-on implementation to the entry review. Playbook work, facilitation and ongoing advisory are separately scoped.

A useful first conversation

Where does a customer's implementation most often stall?
Which decisions keep coming back to leadership?
What work is your team doing that nobody planned or priced?
What would the customer experience differently if that problem were fixed?

Discuss the review
https://nekulakadvisory.com

How AI supports the work

AI can accelerate draft maps, interview guides, analysis structure and template creation. The advisor validates the facts, checks the method and owns the recommendation. Client information belongs only in approved tools under agreed data-handling rules. AI output is not evidence or a substitute for specialist judgment.

Method references

Lean Enterprise Institute: Value Stream Mapping
https://www.lean.org/lexicon-terms/value-stream-mapping/
Lean Enterprise Institute: A3 Report
https://www.lean.org/lexicon-terms/a3-report/
ASQ: Root Cause Analysis
https://asq.org/quality-resources/root-cause-analysis
ASQ: Plan–Do–Check–Act Cycle
https://asq.org/quality-resources/pdca-cycle
ASQ: Quality Tools
https://asq.org/quality-resources/quality-tools

Methods are adapted here to a hypothetical SaaS workflow. References explain general methods; they do not validate the scenario or endorse Nekulak Advisory. No proprietary employer templates are reproduced.