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0-to-1 B2B SaaS Customer Portal

Rapid Adoption and SOC Enablement

Executive summary

Built a centralized multi-tenant customer portal to deliver MDR and non-MDR services; onboarded 80% of customers in year one and shipped seven major releases that improved SOC reporting and service delivery.

Context and objectives

- Customers: MSSPs, enterprise SOC consumers, partners.
- Business drivers: consolidate service delivery, reduce manual reporting, improve customer visibility into SOC operations.
- Constraints: existing legacy tools, tight timeline, need for secure multi-tenant access.
- KPIs: customer onboarding rate, time to onboard, number of releases, SOC report automation rate, customer NPS/CSAT signals.

Role and scope

Product Manager / Product Owner; owned product strategy, roadmap, backlog, and cross-functional delivery across Engineering, SOC, Customer Success, and Product Marketing; 12-month project from discovery to GA and iterative releases.

Problem statement

Customers lacked a single pane for service status, incident visibility, and reporting; manual processes created delays and inconsistent communication between SOC and customers.

Approach and strategy

- Discovery: stakeholder interviews with CISOs, SOC managers, analysts, and Customer Success; review of support tickets and SOC workflows.
- Prioritization: value vs. effort matrix; focus on high-impact, low-effort features for early adoption (dashboards, automated SOC Status Reports), including some delighters with fundamental operational functionality to aid adoption.
- Roadmap: MVP for core visibility and onboarding; iterative releases every 6–8 weeks for additional large-scope capabilities.

Execution and key activities

- Defined product requirements and acceptance criteria for MVP features.
- Coordinated architecture and security reviews for multi-tenant and user-level design.
- Led integration work with D3 and ServiceNow for incident lifecycle and ticketing.
- Partnered with UX to design dashboards and onboarding flows; validated with analyst shadowing sessions.
- Managed sprint planning, backlog grooming, and release readiness with engineering and QA.
- Built onboarding playbook and trained Customer Success and Sales Engineering.
- Launched pilot with 5 strategic customers, collected feedback, iterated, then rolled out GA.

Technical architecture and integrations

- Components: frontend portal, API gateway, event ingestion pipeline, analytics index, role-based access control.
- Integrations: D3 (incident orchestration), ServiceNow (ticketing), AI enrichment service (incident analysis), telemetry from Vision EDR and other sensors.
- Security: tenant isolation, user management, AuthN and AuthZ at UI and API levels, certificate lifecycle management, audit logging.

Deliverables and artifacts

- Product spec and prioritized backlog.
- Wireframes and clickable prototypes.
- API contracts and integration guides.
- Onboarding playbook and training decks.
- Release notes and customer communications templates.

Results and metrics

- 80% of customers onboarded within 12 months.
- Seven major releases in year one.
- Automated SOC Status Reports reduced manual reporting time by days per report.
- Improved SLA adherence and faster incident visibility, and increased SOC communications for customers.

Challenges and mitigations

- Legacy data formats: created mapping layer and normalization pipeline.
- Cross-team dependencies: instituted weekly cross-functional sync and RACI for integrations.
- Customer onboarding friction: developed templated onboarding playbooks and automated provisioning.

Lessons learned and next steps

- Early analyst involvement accelerates UX validation.
- Invest in onboarding automation to scale adoption.
- Next steps: richer reporting, role-based dashboards, expanded AI enrichment, partner marketplace.