

CASE MATERIAL

Rellune — Synthetic Research Companion Summary

Companion edition | Not the original task input

Showcase Companion Material · Revised October 2026

Companion material prepared from the published presentation and speaker notes. It is not the original task input. Suggested task instructions are newly written, not historical prompts.

12-slide product review; next-quarter 12-week MVP decision.

Case scope and data identity

All customer records, quotes, product usage, competitors and financial assumptions in the published Rellune case are synthetic. This is a mixed-research demonstration, not external market research or real customer evidence. The companion summarizes the published aggregate findings and notes, not the original row-level datasets.

The deck names 00_source_guide.md, 01–05 research files and analysis_metrics.json. Those original files were not recovered here. Do not infer or manufacture 18 interview transcripts, 240 tickets, 186 survey rows or 1,200 account records from the published totals. Quotes below are explicitly synthetic case excerpts.

Evidence register and aggregate baseline

Published scope: 18 synthetic interviews across operations, RevOps, CS, IT and implementation; 240 support tickets; 186 survey responses; 1,200 new accounts; four fictional competitor profiles.

Aggregate findings: median time to first value 190.5 minutes; 79.0% rate assistant interest 4 or 5; 77.5% of tickets fall in integration, permission, workflow or mapping categories. Percentages are published aggregates with distinct denominators. The original survey scale distribution and ticket rows are not supplied here; do not invent them. Competitor names/profile rows are also unavailable.

Funnel and retention association

Sequential synthetic cohort: 1,200 accounts started (100.0%); 802 connected a source by day 7 (66.8%); 557 launched a first workflow by day 7 (46.4%); 317 activated by day 14 (26.4%). Rates use all 1,200 accounts, not the preceding stage. The terms are source connection, live workflow and activation, not generic setup or first project.

Day-60 retention is 81.4% among activated accounts and 48.0% among non-activated accounts: +33.4 percentage points of association. This does not prove that activation causes the full retention difference. Readiness or selection could contribute. Counts of retained accounts are not reconstructed from rounded rates.

Synthetic customer excerpts and pain ranking

INT-02, RevOps manager, integration authentication: “I spent forty minutes deciding whether the connector needed my token or a service account.”

INT-03, CS lead, first workflow: “There were twelve templates, and I had no idea which one would prove value fastest.”

INT-16, operations lead, trust/control: “I would use an assistant if it showed its evidence and let me approve each change.”

These are synthetic excerpts reproduced from published page 5, not independently collected testimony or complete interviews.

Page-6 aggregate prioritization reports integration credentials at 26.3% of survey blockers with 19.5% activation, first-workflow choice at 23.1% with 13.3% activation, permissions/roles at 23.7%, and data-field mapping at 14.5%. Different measures must remain distinct; do not sum survey percentages into the 77.5% ticket share. Frequency alone is insufficient; prioritize with activation/TTFV and support burden.

Diagnosis, journey and MVP boundary

The published diagnosis: prerequisites surface late; static guidance ignores systems, role, risk and outcome; successful setup can hide bad mappings/no value; handoffs lose state. The unmet job is guided judgment with user control, not more generic instructions.

Five-stage proposed journey: define outcome/owner/systems/deadline; verify access to two approved sources; preview configuration and exceptions; prove an observed first-value outcome through bounded write with rollback; hand off with full history and next owner.

MVP: goal/system intake and named plan, prerequisites/credential checks for two connectors, one recommended workflow from three curated patterns, read-only diagnosis, evidence-linked explanations, preview/approval/bounded write/rollback. Mapping exception handling and adoption nudges are later. Exclude custom connectors, migrations, unrestricted production changes and standalone monetization. Scope is a hypothesis, not a committed roadmap.

Quarter-one investment scenario

Published scenario: \$240K quarter-one build versus about \$319K directional annualized gross-margin upside. Assumptions: annual new accounts 1,200; activation 26.4% →36.0%; +33.4-point retention association; \$12K annual contract value; 70% contribution margin.

The displayed rounded chain is approximately 115 more activated accounts → approximately 38 directionally retained accounts; $38 \times \$12,000 \times 70\% = \$319,200$, shown as \$319K. Using unrounded rates throughout produces a different result; preserve the published rounded scenario and disclose its rounding rather than claiming an exact raw-data calculation. This does not establish causality, achieved revenue, ROI or willingness to pay. Annualized potential and a single quarter of build spend are different horizons; not a proven payback calculation.

Twelve-week pilot and funding request

Fund one cross-functional squad for 12 weeks: one ICP, two connectors, three workflow patterns, three design partners. Prefer randomized or matched holdout where feasible. Reviews at weeks 6 and 12. Product, engineering, safety and partner sponsors own the decision.

Five proposed gates: median first-value time 190.5 → ≤ 120 minutes; day-14 activation 26.4% → $\geq 36\%$; onboarding tickets per account down 25%; verified completion $\geq 85\%$; zero unapproved production writes. Ticket reduction has no absolute baseline supplied; verified completion is a new measure. Do not invent those baselines.

Stop for context intake below 60%, bespoke integrations, failed checks without evidence, trust failure or absence of a viable budget owner. Recommendation: go for bounded pilot; no-go for a general autonomous onboarding platform. Continue only after product, economics, repeatability and safety evidence passes.

Published-page correspondence

Pages 1–2: synthetic identity and bounded funding; 3: five source groups; 4: cohort/retention; 5: synthetic quotes; 6: prioritization; 7: diagnosis; 8: journey; 9: MVP scope; 10: scenario; 11: gates; 12: committee vote. Original row-level records are not attached; this summary must never be labeled the historical research dataset.