



Case-Study Exercise: Module Five

Case-Study Exercise: Overview

Purpose

This exercise will test the following knowledge and abilities:

Basic research skills: Your ability to review existing customer related information to determine what is important and how it fits together

Onboarding awareness: Your general understanding of the need for successful onboarding and the basic processes involved in researching, planning for and implementing onboarding for a new customer.

Onboarding research: Your ability to perform sufficient and appropriate research and documentation to ensure that information required for onboarding planning is uncovered and recorded.

Onboarding planning: Your ability to determine an onboarding plan for a new customer engagement, based upon an analysis of the information uncovered and documented during the research process

Onboarding implementation: Your ability to work with the customer's stakeholders, your own colleagues and third parties as necessary to deliver an appropriate onboarding experience for the customer's end users.

Instructions

First read the 'Task', making sure you absorb and understand it fully. Then turn to the 'Scenario' to read the background information that relates to the task, again making sure you absorb and understand it fully. Once you are sure you have fully understand both task and scenario, complete the task using the information provided within the scenario to help you.

The task should take you a minimum of 45 minutes to complete. Some students may find they need longer in order to complete the task thoroughly.

Once you have completed the task, turn to the 'Model Answer' and compare your own response with that within the model answer. Note that the model answer is simply one possible response to the task, and does not provide either a 'best' or a 'definitive' response to the task, since there may be multiple ways in which information contained in the scenario and tasks might be interpreted, and multiple ways in which problems might be approached and/or challenges might be overcome, that would all yield an equally positive result.

Case-Study Exercise: Challenge

Task

Download the “Onboarding Scoring Matrix” and the “Onboarding Requirements” tool. Based upon the information provided in the “Scenario” section shown below, use the “Onboarding Scoring Matrix” to determine what you believe to be the appropriate level of onboarding need for the customer. Once this is completed, use the “Generic” tab of the “Onboarding Requirements” tool to document as much information as you can gather about the customer from the “Scenario” that relates to their onboarding requirements. Make a simple list of what you believe to be the main potential challenges and obstacles that might need to be addressed during the onboarding process. Finally, make a simple, short list of obvious next steps that you might take as CSM to move things forward with this customer engagement. You may need to make reasonable assumptions about the company you work for, the customer’s organization, and/or the customer’s stakeholders in order to fully complete the exercise. Remember that if you do not know something, you can always make an assumption and then validate it later when you have the opportunity.

Scenario

You are a Customer Success Manager (CSM) working for a software specialist provider in the hotel and leisure industry called *Cropper llc*. Your company has won a contract with a brand new customer, a Turkish owned hotel chain headquartered in Ankara called *Kocak Holiday Group*, that owns and runs 27 of its own hotels plus manages a further 17 hotels on behalf of other hotel owners across Turkey, the Middle East and Mediterranean Europe. Kocak is just completing a large datacenter refresh project, which it hopes will provide them with their data storage and IT application hosting requirements for the next twenty years.

Alongside their datacenter project, Kocak has engaged Cropper to provide a room reservation management and integrated payment system. This new system is Cropper’s flagship and most sophisticated software product called *RoomStacker*, which was selected by Kocak as their new reservations software solution with the help of your own company’s sales team and software specialist advisers. The contract includes the installation and configuration of the system itself, plus training for Kocak’s IT team, who will take over the ongoing management and maintenance operations. The contract also includes three years’ second line support for Kocak’s technical team, after which the contract will end and Kocak can take up an annual service contract with Cropper if they wish. There is no end user training or support within the contract beyond Cropper’s standard onboarding package which is provided at no charge and includes a basic familiarization session for managers.

The new reservations system works by processing secure online reservations made by the hotel chain’s customers (both individual travellers and travel agencies) through both Kocak’s own website and each of the websites of the third party owned hotels that Kocak manages, plus reservations

made on behalf of customers by Kocak's own reservations staff at their Head Office and reception staff at the hotels they both own and manage. The data is then passed through to a backend system which can be accessed by Kocak's management team to manage the bookings. Other features include the automation of reservation confirmation emails and connectivity with the company's Ankara-based customer support center, and a range of management, administration and reporting functionality for both centralized managers and reservation specialists at Kocak's headquarters and for managers and reservations specialists on location at each hotel in the chain. In all, *RoomStacker* is a sophisticated software systems, with a wide range of features, functions and configuration options and Kocak anticipates that it will last them a long time as their tool of choice for managing their guests' reservations and financial transactions.

The new reservation system will enable far better utilization of each hotel's capacity, as the current, partially manual system means that many rooms go unoccupied even during peak seasons due to the lack of real time data available on room availability at each hotel. It is also expected that the new system will reduce administration overheads through the automation and simplification of routine administrative processes. Finally, it is believed that the new system will also provide better quality management reporting that will enable Kocak's senior managers to make higher quality strategic decision making on behalf of their company.

You have been selected to be Kocak's CSM and you have met with your company's sales person – Marek Malinowski – who put together the winning bid, as well as the software specialist – Mabel Adeyemi – who was involved in the pre-sales process and who will be responsible for the technical aspects of installing and configuring the solution. They have provided you with the above information, and also briefed you on the current status of the project, which is now at the stage where the server hardware and operating systems, cloud management and security software have all been installed and configured in Kocak's datacenter. The next stage will be to install, configure and test the *RoomStacker* software system, which is scheduled to occur over the next three to four weeks, and to prepare Kocak's IT team to take over the running of the system, with sign-off expected for this in five weeks' time. Once this is completed, end user training for Kocak's managers and reservations specialists at their Head Office and for managers and reception staff at each hotel would need to take place, although as things stand, this would be for the customer to complete rather than for Cropper to perform.

According to the sales person, the customer has been quite difficult to work with, not because of any lack of willingness to cooperate but simply because of its lack of experience in purchasing and implementing technology of this sort and on this scale, and a general culture of slow decision making with no real sense of urgency. This is by far the largest IT project that Kocak has ever purchased and as such they are "finding out what they really want as they go along" to quote the sales person. Whilst the product specialist enjoyed the opportunity to visit not just Kocak HQ but also several of the Kocak hotels to interview managers and staff there, she did express concerns about the lack of communication between HQ and some of the hotels, and also she let you know that although Kocak stated that all their managers and the majority of the remainder of their staff speak "excellent English", in reality she thought that in her opinion not all local managers and certainly not all staff in the hotels that Kocak did not own outright are as competent in English as the senior management team made out. As well as this, whilst Kocak have an HR team they do not have a dedicated training department and have no professional trainers of their own that could attend "train the trainer" sessions and then take on the role of training end users of the new system themselves – something

which does not seem to feature anywhere in the contract or in conversations with the customer to date.

An additional concern is a press release that Kocak published to the investor community when the contract was first signed, that stated that the new datacenter would be fully operational and the new reservations system would be up and running and in full use by a certain date. The problem is that the completion of the preparations in Kocak's datacenter was delayed by a good six weeks, and the date that Kocak announced is now just five weeks away, but yet the software is still needing to be installed, configured and tested, which itself will take three to four weeks. The Kocak senior management team are concerned that delays to the project might negatively impact investors' confidence (and therefore their company's share price) and so they are keen to find a way to get all users of the system at both headquarters and at least at their own hotels but preferably at all hotels trained and prepared and ready to start using the system the instant it goes online. Whilst this may be possible, your product specialist Adeyemi does point out that at least for some of the managed only (ie managed but not owned by Kocak) hotels, local IT infrastructure and security systems are still waiting to be upgraded, since there were some commercial issues between Kocak and one or two of their clients (the hotel owners) that held things up for longer than anticipated. The exact implications of this have yet to be calculated.

The senior project lead (SPL) for the customer is Anita Aydin. She is has only recently been appointed to the role, and she is one of Kocak's junior HR managers from their head office in Ankara and is relatively unknown by anyone in your company. She was not involved in the pre-sales process, although her immediate line manager is Hussain Yilmaz, who is the Head of HR and who was involved in some of the pre-sales meetings, although he was not their key decision maker. The general feeling about her is that she is fairly junior and does not hold a lot of power or have a lot of experience of implementing and managing IT projects such as this one.

The key decision makers were Omer Demir, who is the company's Head of Finance and Eymen Yildirim, the company's CEO. Yildirim was the person who actually announced the decision and signed the contract, but it is generally agreed by both Malinowksi and Adeyemi that Demir had at least as much if not more say over that decision as did Yildirim.

MODEL ANSWER

Warning: Do not review until after you have completed the exercise

Case-Study Exercise: Model Answer

Note: For this exercise, multiple assumptions may have been made during the development of your answer, as they were during the development of the model answer shown below. As such, your answer may be somewhat or even very different from the model answer in its detail. That is fine, it is not necessary for your answer to match the model answer in its detail, so long as you can justify the specifics of your answer, and so long as your answer is as logical and orderly, and similarly comprehensive to that of the model answer.

Customer Onboarding Scoring Matrix:

Aspect	Score (0 to 5)	Explanations
Products/Services	4	Score 0 for simple solutions and 5 for complex solutions
Customization	3	Score 0 for minimum customization and 5 for maximum customization
Adoption Needs	4	Score 0 for simple adoption needs and 5 for complex adoption needs
Customer Maturity	5	Score 0 for high maturity and 5 for low maturity
TOTAL	16	

Key	Products/Services	The generic complexity of each of the solution components
	Customization	The level of unique customization required by the customer
	Adoption Needs	The customer's needs for adoption and utilization of the solution
	Customer Maturity	The customer's maturity and preparedness levels for adopting and utilizing the solution

Results Indicator		
0 to 5	Simple	A simple onboarding requirement needing only a basic, low touch approach
6 to 10	Straightforward	A straightforward onboarding requirement that may need a small amount of customization and/or planning
11 to 15	Fairly Complex	A fairly complex and customized onboarding requirement that needs to be planned in advance
16 to 20	Highly Complex	A highly complex onboarding requirement with very bespoke needs, requiring careful planning and project management

Instructions

- To use this tool simply insert a number from 0 to 5 in each of cells C3 to C6, following the advice for each row in Column D
- If you cannot remember what each row means you can review the information in the Key in rows 10 to 13
- Cell C7 will automatically add up and display the total for you, which you can then compare with the Results Indicator shown in rows 16 to 20
- Remember that this is a very simple "ready reckoner" and is designed just to give a quick and simple indication (only) of the likely level of onboarding requirement

Completed Onboarding Requirements Questionnaire (on next page):

A	B	C	D	E	F	G	H
Customer Name		SPL Name		SPL Email		SPL Mob	
Initiative Name		SPL Title		SPL Tel		SPL Location	
1	Kocak Holiday Group		Anita Aydin		Need to find out		Need to find out
2	Reservation System for Kocak Group		HR Manager		Need to find out		Ankara
3							
4							
5	Product / Service 1	Version	Quantity	Consumption Model	Configuration Included	Configuration Needed	Additional Information
6	Roomstacker	Current	45 locations (inc HQ)	Outright Purchase	Yes	No	N/A
7	Product / Service 2	N/A	Ankara Datacenter	Outright Purchase	N/A	N/A	N/A
8	Product / Service 3	N/A	Ankara Datacenter	Outright Purchase	N/A	N/A	N/A
9							
10	Support Service 1	Version	Additional Information				
11	Second Line Technical Support	Current	36 months initial contract				
12	Support Service 2	Need to find out	Need to find out				
13							
14	Professional Service 1	Version	Additional Information				
15	IT Team Training	Current	Need to find out				
16	Professional Service 2	Basic	Need to find out				
17	Professional Service 3	Need to find out	Need to find out				
18							
19	Current Status		Delayed by Datacenter				
20	Deadline / Milestone 1	Date?					
21	Install Roomstacker	Need to find out					
22	Configure Roomstacker	Date?					
23	Test Roomstacker	Date?					
24	Deadline / Milestone 3	Date?					
25	Training Kocak IT Team	Date?					
26	Go live with Roomstacker (Internal)	Date?					
27	Go live with IT Support	Date?					
28	Deadline / Milestone 4	Date?					
29	Go live with IT Support	Date?					
30	Deadline / Milestone 5	Date?					
31	Training Kocak Managers	Date?					
32	Training Kocak Reservations Specialists	Date?					
33	Deadline / Milestone 6	Date?					
34	Training Kocak Reception Staff	Date?					
35	Deadline / Milestone 7	Date?					
36	Training Kocak Reception Staff	Date?					
37	Deadline / Milestone 8	Date?					
38	Go live with Roomstacker (External)	Date?					
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Challenges and Obstacles:

- Short timescales (due to late completion of datacenter)
- Complex product utilizations requirements (multiple end user types, complex functionality)
- Lack of product familiarity (both IT staff and end users have not used similar product before)
- No internal training department (who will train the end users?)
- Slow decision making (customer is culturally slow to adopt new ideas and make decisions)
- Disparate geography of users (44 hotels across multiple countries, plus head office)
- Disparate end user IT skill levels (assumption for validation, as not much is known)
- Not all staff are fluent English speakers (assumption for validation, as not much is known)
- SPL has little authority within her company (assumption for validation, as not much is known)
- “Basic Onboarding” may be insufficient (assumption for validation, as not much is known)

Next Steps:

- Talk to the Sales Person and CS Team Leader about the potential risks of failure, and discuss the possibility of adding end user training and support to the contract
- (Meantime) develop a plan for initial adoption based upon the existing contract
- Arrange a meeting with SPL Anita Aydin as soon as possible to introduce self, start to build a relationship, validate existing information and learn her perspective as to what needs to be done.

Case-Study Exercise: Your Score

Scoring

Once you have finished, and for your own benefit only, compare your own response to the response within the *Model Answer* and rate your response from 0 (low) to 5 (high) for each of the following:

- *Completeness*: how complete was your response compared with the model answer?
- *Accuracy*: how accurate was your response compared with the model answer?
- *Quality*: How high a quality level was your response compared with the model answer?

Completeness	
Accuracy	
Quality	
Your TOTAL Score	

If you rated yourself at a total of 6 out of 15 or lower your score is lower than ideal, and we recommend you review the module again and then retry the exercise to see if you can improve upon that score.

If you rated yourself at from 7 to 9 out of 15 your score is within acceptable boundaries of competence, although it might indicate perhaps less understanding or experience in the role than a higher score would have done.

If you rated yourself at from 10 to 12 out of 15 your score reveals a good standard of competence that indicates you have understood the task and can perform it well.

If you rated yourself at 13 out of 15 or higher your score reveals a very high level of achievement for this task that indicates your mastery of the topic.