



Case-Study Exercise: Module Four

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

Stakeholder awareness: Your understanding of the types of stakeholder that CSMs are likely to encounter and how their roles, personalities and viewpoints can impact the success of the engagement

Stakeholder analysis: Your ability to determine what information about stakeholders is useful and relevant and to determine gaps in your understanding of stakeholders that need to be researched

Stakeholder management planning: Your ability to determine a stakeholder management plan based upon a stakeholder analysis and an understanding of the requirements of the customer engagement

Documentation: Your ability to document complex information in a simple to understand manner that enables you to share it with colleagues

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 “Stakeholder Management Matrix” tool and complete as much information as you can for the customer, based upon the information provided in the “Scenario” section shown below. Once this is completed, download the “Stakeholder Management Plan” tool and create a stakeholder management plan for this customer, again using the information provided in the “Scenario” section shown below. Try to make both your Stakeholder Management Matrix and your Stakeholder Management Plan as comprehensive as possible. 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 large software development company called *The Softer Side* (TSS).

Your customer is *Powell & Haynes Partners* (P&H) – an old and traditional accountancy firm, founded in 1902 and with its headquarters in London, England. P&H has well-established business operations in the following countries:

- United Kingdom (Head Office)
- Germany
- Switzerland
- Austria
- Belgium
- Netherlands
- Spain

It has more recently opened further branch offices in the following additional European countries:

- France
- Italy
- Greece
- Portugal

P&H prides itself on providing a wide range of accountancy services to businesses of all sizes from self-employed individuals right through to large, multi-national corporations, but its particular strength is with companies who operate in multiple countries within Europe, since the firm’s European reach means that it can often directly cover the accountancy needs of this type of

customer in each European country that the customer operates in. Where it cannot, it can often partner with other accountancy firms with whom P&H has a relationship.

Although P&H is an old and highly respected company, and although it maintains what might be described as “traditional values”, it is very much a modern company that believes in innovation. It has invested heavily in IT over the years and relies heavily on its software systems to perform its operations. Over the years it has built up its own accounting software systems, with modules for cash flow, for payroll, for expenses and for tax. This system is called SmartFLOW and many of P&H’s customers use SmartFLOW as their main financial accounting software system.

As previously stated, you are a Customer Success Manager working for a large software development company called *The Softer Side* (TSS) and you have been assigned as the CSM for P&H. TSS was recently engaged by P&H to help them port their SmartFLOW software system to the Internet so that instead of customers having to install the software on their own local servers they can simply log in to the system via the Internet and use it as a fully managed service. This has now been accomplished and P&H will soon be launching this new service into the market, calling it SmartFLOWLive.

Customers can now therefore select whether to continue to run SmartFLOW on their own systems (which P&H believes will remain the preference for most larger customers) or to connect to SmartFLOWLive as a service over the Internet (potentially a less expensive and more flexible option that P&H thinks will suit many small to medium customers). New customers will also be able to select either the traditional or fully managed route, but P&H are going to be pushing hard to try to get as many customers onto the new system as possible, as it somewhat simplifies the work of their accountants when providing accountancy services and advice to customers who use the new, centrally hosted system, and provides an additional income stream in the form of ongoing annual management and maintenance fees.

Here is what you currently know about the history of the dealings between your company *The Softer Side* and its customer P&H:

The TSS account manager for P&H held initial conversations with their CIO (Chief Information Officer), CTO (Chief Technology Officer), and CSMO (Chief Sales & Marketing Officer) to understand the high-level requirement, and then worked with one of your Senior Solution Architects and various subject matter experts to help P&H’s CTO (who has the primary responsibility for the success of the initiative) to identify their requirements and build the business case. The Business Case determined that in addition to performing the principal function of managing P&H’s customers’ accounts as a fully hosted and managed solution, it could also provide additional services such as the management of investment portfolios, and supply chain management. These additional modules are still in consideration, and your company is awaiting the decision from your customer as to whether or not to proceed with these additional modules.

Following approval of the business case by the P&H Planning Board, the Account Manager, and Senior Solution Architect developed a sales proposal with costs and anticipated returns against a five year timeline within which it was calculated that P&H would see a healthy return on the substantial initial investment in software development required by the project.

The proposal was (with appropriate negotiations) approved by the P&H Board and TSS started development work. The initial development was recently completed, and the testing phase is currently in progress, with acceptance anticipated within the next few weeks. Accordingly, your company TSS is preparing to help the customer with onboarding and adoption of the new system.

Whilst it is based on the existing software system, there are some functionality differences that accountants will need training on, but in particular, P&H's IT team will need to be trained in how to run the service, and it's Customer Support team will need to know how to help customers of the service. As previously stated, you have been identified as the person who will perform the role of Customer Success Manager for P&H.

You have met with your Account Manager who was responsible for the sale to P&H and she has given you a brief overview of the project (see above) and described the key P&H stakeholders to you (see below). She has also stated that she is keen to work with you over the next few months as the implementation and adoption phases go ahead to try to meet or exceed the customer's expectations with this existing project, so that she maximizes her chances of winning the additional development of the proposed investment portfolio management and supply chain management modules.

Stakeholder Information

The Account Manager and your corporate CRM system have provided the following additional information about P&H's senior management team:

CEO and Senior Partner: Nicholas Chapman

Chapman joined the accountancy firm 25 years ago and has held his present role as CEO for the last 7 years. He played an important role in expanding the company's geographical and operational activities in the '90s and also in steering the firm through the difficulties of the financial crisis in 2007/8 and subsequent global economic downturn. Chapman is generally considered to be a "safe pair of hands" and quite risk averse when it comes to large IT investments.

As might be expected, Chapman has not been actively involved in the day-to-day detail of the SmartFLOWLive initiative, although he is known to be a "hands on" leader and sees this as an important initiative for the firm, due to the additional revenue opportunities it offers, and also to what he believes will be the capability to become "closer to the customer" by providing these customers not only with accountancy services but also with a fully managed software hosted accountancy solution. As such he has asked to be kept apprised of developments during implementation and adoption, and is keen to gain early indications of customer acceptance and utilization levels once the service goes live.

In general, Chapman's primary interests appear to be the retention of existing clients and expansion of per-client revenues through provision of additional services that add value to the client, which in turn stimulates fee-earning activity, over and above the acquisition of new customers.

CFO and Senior Partner: Marianna Gonzalez

Gonzalez has recently moved to P&H from a well-known top tier Boston USA-based chartered accountancy firm following the retirement of the previous incumbent to the position who had been performing the CFO role for 23 years. Gonzalez has a brief to help manage the firm's finances through the process of digitalization, and brings some experience of this, having supported her previous firm in a similar project where she was known for aggressive but successful process re-engineering and automation initiatives that drove significant efficiency and productivity benefits, though these were not always looked on favorably by staff and unions.

Gonzalez is as yet an unknown entity so far as TSS is concerned, not having had much visibility in the pre-sales phase except at arm's length to approve decisions that were put to her by P&H's CIO and Head of Technology. What is known about her is that *all* financial decisions of any significant level

are either directly made by her or at least include her involvement in the decision making process, and she has a reputation for withholding funding if she cannot see the financial justification for spending it. What is also known is that as a senior partner she commands a large degree of respect and authority from everyone in the firm.

CIO: Hannah Simpson

A long-time employee of the firm with a strong technology and information systems background, Simpson has been in her current role for 8 years, though she was previously employed by the firm for a further three years in a part-time consultancy capacity.

Simpson is the person within P&H who is primarily responsible for digital transformation (which this initiative comes under), but she has a reputation as a poor team player, with a tendency to jealously guard information and she often makes decisions on her own rather than through consultation and negotiation with her colleagues. This has led to one or two “polite arguments” amongst the senior management team. However, she is generally acknowledged as a very competent (and highly confident) professional who performs her job extremely well and it is well known that she is considered by the CEO Nicholas Chapman to be a valuable (if somewhat difficult) member of the executive team.

Simpson’s primary concerns are innovation and service excellence and she has had a significant involvement in the development of the business case for this initiative, however she is known to have a long-term strategy for rolling out all sorts of other cloud-based digital services to both internal users and clients, and the feeling is that she may be more concerned that these projects are not stalled by this initiative than she is about the success of the initiative itself.

Head of Technology: Gavin Hunt

Hunt is another relative newcomer, having been appointed into his present role 2 years ago from a similar role within a large reinsurance company that is also headquartered in London. Hunt is very much an “ideas man” and has already established a name for himself within the firm for sound judgment and dependability.

Hunt is very much a relationships person, with a collaborative style of working and he is very supportive of his staff, with whom he gets on very well and has built a good level of loyalty from during his tenure. Hunt gets on well with all the other members of the executive team except CIO Simpson where there has been a few small conflicts regarding demarcation of duties and decision-making responsibilities. Though important, his role is seen as more junior than that of the CIO, to whom he reports.

Hunt’s core involvement with this project has been the selection and management of the relationship with a third party contractor who is providing the physical infrastructure for the fully managed service.

Hunt has now been appointed Project Lead for the implementation and adoption of the new service and for its ongoing technical management, and as such will be the Customer Success Manager’s principal customer contact for the project.

Head of Customer Support: Ajay Kapoor

Kapoor is responsible for managing a team of twelve customer support personnel, which has recently doubled in size from the original six in order to cope with the perceived additional customer support demands of the new, fully managed solution. Kapoor reports to Hunt, the CTO. Your

company has not had any dealings with either Kapoor or the support team as yet, but the team will play an important part of the onboarding and adoption that you will be responsible for helping with.

CSO: Lars Adamson

Adamson has held the Chief Security Officer position for 5 years and was promoted internally from his previous role as Information Security Director. Adamson performs both the traditional role of CSO (responsible for compliance, risk reduction/mitigation and the development and management of policies for operational, strategic, financial, and reputational risk) and the closely associated role of CISO (responsible for managing the security of corporate and client information across the firm's IT and physical infrastructures).

Adamson is a highly experienced and qualified security expert who is well briefed on the latest security trends and concerns and he has an excellent eye for detail. Adamson officially reports to the CTO but also has informal ties to the CIO.

Adamson worked closely with the CIO, the Head of Technology and the TSS sales team to develop and refine the original Business Case, and he subsequently led the security testing of the new system during the pilot phase. It is assumed that he will continue to be involved on an ongoing basis in managing the security of the system.

VP Client Services: Justin Lambert

Lambert is a long-term P&H employee, having worked for the company for 23 years. His role is principally to manage the relationship between the firm and its customers, and part of that role is to propose ways of improving existing services and to help research and develop new client services.

The firm's senior partners view the process of continuing development and improvement of client services as a critical part of its strategy for remaining competitive and for both attracting new clients and retaining existing clients. Lambert therefore has a lot of power and influence within the executive team, and he has an excellent relationship with CEO Chapman, to whom he reports directly.

Lambert's role in the project is of course the customer-facing side of things, and he will take the lead in influencing existing customers to move from their existing services to the new SmartFLOWLive system.

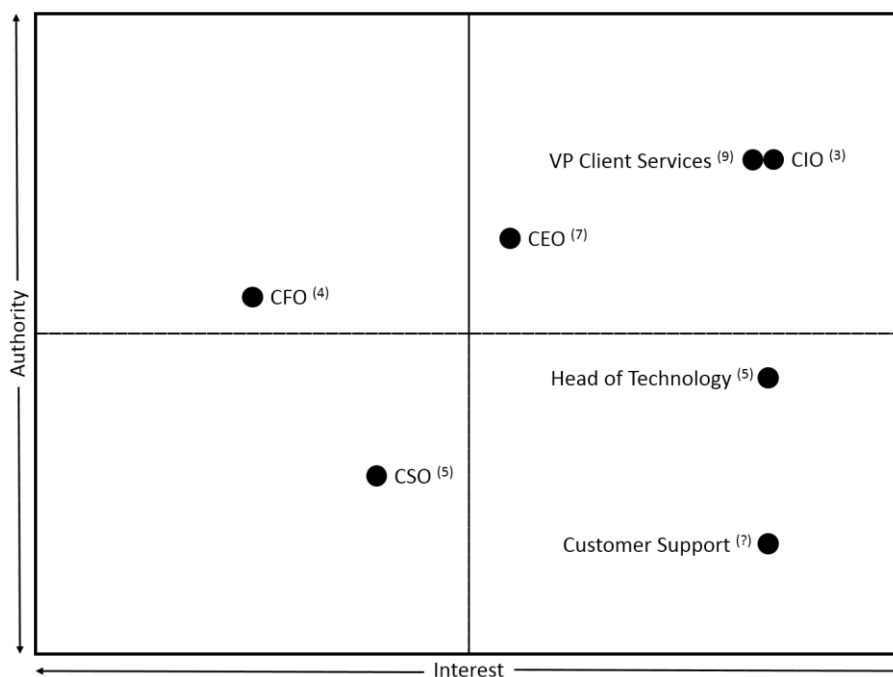
Lambert was heavily involved throughout the development of the business case as an adviser and consultant from the perspective of representing the users of P&H's services, and he is an enthusiastic supporter of the project. Your Account Manager has warned you that Lambert "can be difficult" since he holds so much power and authority and has shown himself to be very single minded in the pursuit of his own interests around improvements to Client Services.

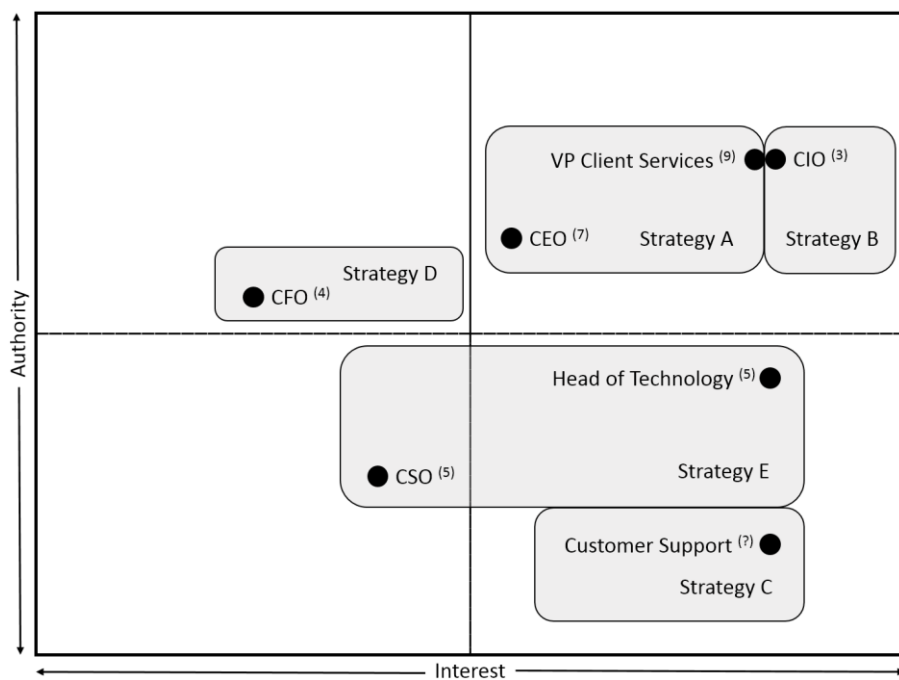
MODEL ANSWER

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.





Strategy	Name	Job role	Relevance	Seniority	Authority	Interest	Support	Primary Desires	Primary Concerns	Notes	Category	Current Situation	Desired Situation	Specific Strategy	Assigned to	Deadlines	Measurement
A	Nicholas Chapman	CEO	Responsible for the overall strategic direction of the business	Top	7	6	7	Retain existing customers, and find ways of earning more fees from them	To become "closer to the customer"	N/A	N/A	Interested and Supportive	Maintain level of interest and support, and use this plus their authority level to influence others	Develop clear outcome criteria and KPIs to measure and show progress. Then agree with them an internal reporting and "marketing" campaign to evangelize the value of the initiative to others inside the company	CSM	ASAP	Agreement in place
	Justin Lambert	VP Client Services	Representing the users of P&H's services. Influencing existing customers to move from the new system	Middle	8	8	9	Ensuring P&H remains competitive, attracts new clients and retains existing clients	To ensure existing customers move to the new service	N/A	N/A	Awkward to deal with, and unresponsive due to her concerns	To be come either fully supportive or at least to not cause any problems	Find a way to ensure that the success of her other digital transformation projects will either not be affected or even enhanced by this initiative	CSM	ASAP	Factual evidence in a report
B	Hannah Simpson	CIO	Responsible for all corporate digital transformation strategy and initiatives	Senior	8	8	3	Rolling out other cloud-based digital services to both internal users and clients	To ensure that her other projects are not stalled by this initiative	N/A	N/A	The team and their manager have not yet been met	An understanding of their position and needs	Meet the team for at least the manager and understand their position and needs	CSM	ASAP	Meeting scheduled
C	Team of 12 plus Ajay Kapoor	Customer Support Team	Responsible for supporting customers on the new system	Junior	2	8	?	Unknown as yet	Unknown as yet	N/A	N/A	Not much dealings with the initiative	Keep her satisfied in terms of costs and return on investment	Work with Chapman and Lambert to produce monthly and quarterly financial reporting to satisfy her needs	CSM	Next three months	Financial reports created
D	Marianna Gonzalez	CFO	All financial decision making	Top	6	4	4	Money is spent wisely and managed carefully	Unknown as yet	N/A	N/A	Currently "Ok" with the situation, and will be involved from a technical (IT and security) perspective					
E	Lars Adamson	CSO	Management of all security including digital security		3	4	5	Unknown, but assumption is to ensure new system does not cause any security issues	Security of the system and of customers' and the firm's data	N/A	N/A						
	Garvin Hunt	Head of Technology	stakeholder 7	Middle	4	8	5	Unknown, but assumption is to ensure new system performs well from an IT perspective	Ongoing availability and performance of the technology	N/A	N/A			Provide them with regular progress updates, and enable them to provide feedback and input as necessary	CSM	Next three months	Progress updates

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.