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Case-Study Exercise: Module Nine

Case-Study Exercise: Overview

Purpose

This exercise will test the following knowledge and abilities:

Data analysis: Your ability to review and analyze complex data in order to gather meaning, predict future trends and making business relevant decisions

Business imperatives: Your general understanding of the need for CSMs to assist their company to achieve its strategic objectives, and the types of results their company looks to the CS team to produce for it

Outcome attainment: Your ability to what has been achieved so far and to what extent these have been achieved, and to discern what outcomes remain to be achieved.

Planning: Your ability to create effective plans for customer success-related activities that enable the best possible results for both customers and the CSM's company

Creative problem solving: Your ability to solve a wide range of problems from simple to complex, using the assets and resources available to you, and taking into consideration all context and limitations placed upon you

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

This task is based upon the same scenario used in Exercises Five and Six, taken from Modules Five and Six respectively. Read the scenario (the only really important part is the "New Information" section, but the initial two sections are there to remind you of the previous information you have already seen) and review the *Engagement Evaluation Tool* (which you can download from the Academy website) and then perform the following three activities:

Part One: Complete an Engagement Evaluation

Based upon the information provided within the scenario, use the "Adoption Implementation" tab within the *Engagement Evaluation Tool* to perform and document an evaluation of the engagement to date.

Part Two: Determine an Attendee List and Agenda for an EBR

Based upon the information provided within the scenario, determine who should attend and executive business review (EBR) for this initiative, and then create an agenda for the review meeting. Your agenda should include timings for each section or topic.

Part Three: Prepare a PowerPoint Presentation

Based upon your agenda, create a simple PowerPoint presentation that you would use to aid your presentation of information to your customer's business executives during the EBR. Do not worry about the formatting too much, since "making it look good" is a separate skill that we are not testing for in this exercise and which some people can simply pass on to colleagues in Marketing or other departments for assistance with. Instead focus entirely on what information should be present.

Scenario

Your scenario for this exercise is the same scenario that was used in two previous exercises – Module Five Case Study Exercise and Module Six Case Study Exercise. However, some additional information has been included that will help you to perform this exercise on engagement evaluation. The first two parts of the scenario are an identical repeat of the original information that you will already have encountered for Exercises Five and Six, which you may want to review to refresh your memory. The third and final part of the scenario is the new information for Exercise Nine that you will need to review carefully in order to complete the exercise.

Part One: Information from Exercise Five (Module Five)

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 alone" 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 a 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 n   ot 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.

Part Two: Information from Exercise Six (Module Six)

A week has gone by since you were assigned to this engagement. During this time you have managed to organize an online meeting with the customer's project lead Anita Aydin, plus Demir

and Yildirim (the customer's Head of Finance and CEO respectively). As well as yourself, your colleagues Malinowksi (the sales person) and Adeyemi (the product specialist) were also in attendance on the call.

What transpired on this call was that a lot was riding on the success of this implementation for the customer Kocak. It was a very significant investment for them, both financially and also in terms of the product being a strategic one which it was hoped would give them the ability to become both more productive and efficient (leading to both greater room occupancy rates and cost savings) but also to deliver a higher quality of service to their customers, leading to growth in demand. Kocak had made a lot of promises to its investors in their announcements and press releases, and they really needed not just to make this work but also to be able to show the value realized by the initiative as early on as possible.

You also learned on the call that in order to maintain good relations with their investor community, Kocak did not want to set back the launch date for the initiative and both Demir and Yildirim were insistent that the previously announced date for going live with the system across the whole company was stuck to. This date is now just four weeks away, and whilst they are currently working on it, the software is not yet fully installed, configured and tested ready for use, the customer's IT team are not yet trained in how to manage and support the new system, and Kocak's reservations team, reception staff and managers have not yet even seen the new system, let alone received training on it.

After the call you had a meeting with your two colleagues, Malinowksi and Adeyemi to discuss the engagement and agree a best way forwards to propose to the customer. Adeyemi suggested that whilst it might be possible to go live with *RoomStacker* on the date previously announced by Kocak, but that there was what she described as "serious risk", particularly with the non-Kocak owned hotels (ie the 17 hotels that Kocak manages on behalf of other hotel owners) because to date there was no reliable information regarding the quality of IT infrastructure within those hotels. The infrastructure might be absolutely fine, but on the other hand it might require updating at one or more of these hotels prior to connecting them up to the new system. Clearly finding this information out and the n dealing with any infrastructure shortfalls was a priority.

Meantime, you suggested that whilst Kocak's senior leaders were adamant that the system should go live on the previously announced date, perhaps they would accept a *partial* "go live" of just their own hotels on that date, with the other 17 hotels going live as soon as possible afterwards. This would buy some time for finding out and dealing with any infrastructure issues for these hotels, and it would also enable resources to be focused on completing the training for the IT team and for the users from within Kocak's own business. The hotel staff at the other 17 hotels could then be trained at a later stage and with less pressure of time, once the product had been successfully launched.

Your colleague Malinowski who had sold the contract felt confident that with your support, and given the pressure on Kocak's senior leadership team to get this implementation right, he could go back to Kocak with a new proposal to deliver not just the IT team training (which is a part of the existing contract) but also the training for Kocak's own staff at the Head Office and in the hotels they own themselves. Kocak's staff could then train the staff at the 17 additional hotels themselves during Phase Two. This meant that issues pertaining to English language difficulties that it was felt might be present in staff in some of these additional hotels would be avoided during the Phase One training, and also add less of an additional cost burden to Kocak than a proposal to take on all of their training overhead. It also meant that the training could start straight away using your own company's existing demo system, without needing to wait for the configuration of Kocak's own

system. Doing it this way saved a lot of time and effectively brought the project back on track for launch within four weeks.

A further meeting was arranged between Malinowski and the customer's CEO and Head of Finance where the above proposal was made and was accepted. Following this, you arranged a follow up online meeting with Kocak's SPL, Anita Aydin to learn more detailed information about how the new software system would be used and who within the organization would be impacted by its implementation. Your notes from this meeting are recorded below:

Item	Description
1	There are six members of the Reservations team, including its manager, whose name is Hiranur Aksoy. Aksoy in turn reports to the Head of Finance. All speak good English and all are said to be familiar with IT systems in general and with hotel reservations systems specifically. All six members of the team are based at Kocak's head office in Ankara. The Reservations team provide offices hours (07:00 to 18:00) coverage for all days except Sunday. The Reservations teams expect the new system to help them to considerably lighten their workload, and are therefore very welcoming of the new system.
2	There are eight members of the IT team, including its manager, whose name is Philip Polat and his deputy whose name is Berat Atalar. The team provides a full management and support service during normal office hours (07:00 to 18:00) every day of the week, and a more limited service from 18:00 to midnight. They then operate a skeleton service from 00:00 to 07:00 whereby one team member is on call to respond to any problems, though not on actual duty. Apparently the IT team are all very excited about the new datacenter and the new software system and are "ready to go" just as soon as they get trained on it.
3	There are ten managers at Head Office, including four senior leaders and six functional heads. These managers work a more standard 08:00 to 18:00 during Mondays to Fridays only, and are often busy with specific tasks, making it potentially difficult to organize them all to attend training at the same event. Aydin suggests it might be better to organize three events at different dates and times and allow managers to select which event to attend based upon their availability. Their principal interest lies in management reporting on room occupancy (ie utilization levels) as this is how the company measures itself in terms of success. Apparently they can sometimes be a little difficult in terms of attitude to turning up to training sessions on time.
4	In each of the 27 hotels owned directly by Kocak there are always one manager and three deputy managers. At least one of these four managers is always on duty between 07:00 and midnight every day, and one of them will be on site and on call if there is a problem at other times.
5	In each of the 27 hotels owned directly by Kocak there are between five and twelve Reception staff, depending upon the size of the hotel. There are at least two to four Reception staff on duty during the daytime and at least one member of staff on duty during the night (midnight to 07:00). The total number of Reception staff across all 27 hotels is 171.
6	The 27 hotels owned directly by Kocak are spread out across 18 different resorts within six different countries. These are divided into three administrative groups, each containing nine hotels, namely Group 1: Turkey & Cyprus, Group 2: Western Mediterranean and Group 3: Middle East.
7	Managers at Head Office are principally responsible for strategic and tactical decision making. To do this they need to view information on screen and save and print various reports. Head Office managers tend to be very busy and not good at attending training on time or paying attention.

8	The Reservations team are responsible for overseeing all reservations, providing information to management, and (their principal task) helping customers and travel agents to search for hotels and to place reservations onto the system. They also deal with things like amendments, transfers, cancellations and refunds.
9	The Hotel Managers are responsible for running their hotel, and they report directly to senior management at Head Office. As well as their own hotel management duties, they can also cover for reception staff if staff are away and/or at peak times of business. Their principal interest is in overseeing room availability and room utilization.
10	The Hotel Receptionists are principally responsible for checking in pre-booked customers and allocating them their rooms, and for checking customers out at the end of their stay. They take deposits on check in and take payments at check out. They also have to be able to make various changes to bookings such as upgrades, date changes, and so on. For some operations (for example a cancellation of an existing reservation made for a different hotel that the customer was originally planning to go on to) they would need to call Head Office and gain assistance from the Reservations team.
11	In addition to their principal duties, the Reservations team also act as an informal "user support" team to help other users navigate and use the software system. It has been decided that the Reservations team will be the ones to train the users at the 17 additional hotels that the hotel manages but does not own.

Part Three: New Information

Several weeks have now gone by and the engagement is considerably more advanced. The entire onboarding and adoption plan has been successfully implemented and completed, and the results were very good, with all users trained to a satisfactory level and both individual users and their managers all expressing their opinion that they understand how to perform their various tasks and duties on the new system and are ready to go.

Your line manager (the Head of Customer Success for your company) has suggested that you hold a business review meeting with the customer's executives to provide them with an up-to-date briefing on what has happened so far, what progress has been made, and what the next steps should be. She also suggested that prior to this meeting you should use the Engagement Evaluation Tool to document and evaluate progress to date, and then to create a simple PowerPoint presentation that you can use to display a summarized version of the information during your meeting.

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.

Part One: Complete an Engagement Evaluation

	One	Two	Three	Four	Five	Six
Challenges Solved	End user training had not been included within the sale, and the customer has no training department or people to take on the role of "trainer" and there is no training plan	Potential issues around English as a second language with some of the end users	The delay caused by the late opening of Datacenter left only one to two weeks to train and prepare all end users on the live system	Promises have been made to investors, that make it very undesirable to move back the launch date	There was no reliable information regarding IT infrastructure in the non-Kocak-owned hotels	
Lessons Learned	End user training should be discussed much earlier and a high level plan for training agreed prior to contracts being signed and any launch dates being agreed or announced	Provide more clarity to customers when advising on English language requirements for end users	When agreeing timescales for implementation, potential risks should be identified and mitigation plans agreed in advance	See Column D	Customer s IT infrastructure must be audited and documented prior to implementation discussions	
Tools or Templates	Create a Training Plan template for our *Room Stacker* product that sales people and CSMs can use in conversations with customers that helps to calculate training needs based on scenario information		Create a Risk Assessment tool for use during implementation discussions	See Column D		
Other Assets / Resources		Consider updating user manual documentation and onboarding documentation				
Process Improvements	Ensure that a discussion about training requirements and the submission of a high level training plan becomes a standard step within the sales process	Ensure that a discussion on English language rquirements for end users occurs during the pre-sales phase	Ensure that risk assessment for implementation is included within the implementation discussion process	See Column D	Ensure that all IT infrastructure is identified and documented prior to implementation discussions	
Systems Improvements	Perhaps include a documented step on the CRM tool?		Consider some sort of "early warning" communications of problems arising that flags a new troubleshooting process as early on as possible	See Column D		
Successes to Celebrate	We saved our customer from delaying their launch by getting the training completed on time		We overcame the issue of undergoing a six week delay and completed the launch on time	See Column D		

Part Two: Determine an Attendee List and Agenda for an EBR

1. Attendee List

Name	Role	Company
You	CSM	Cropper
Marek Malinowski	Sales Executive	Cropper
Mabel Adeyemi	Software Specialist	Cropper
Anita Aydin	HR Manager	Kocak
Omer Demir	Head of Finance	Kocak
Eymen Yildrim	Chief Executive Officer	Kocak

2. Agenda

Item	Duration
Welcome and Introductions	5 mins
Progress Review	30 mins
Customer Update	10 mins
Discussion	10 mins
Documentation of Next Steps	5 mins
TOTAL	**60 mins**

Progress Review

Cropper llc

Head Office	Owned Hotels	Managed Hotels
Phase 1		**Phase 2**
Implementation	**Implementation**	**Implementation**
✓ Completed	✓ Completed	▪ Started
Training	**Training**	**Training**
✓ Head Office Reservations	✓ Reception	✗ Reception
✓ Head Office Management	✓ Management	✗ Management
✓ Head Office IT		

Customer Update

Cropper llc

- Strategy Changes
- Problems / Barriers / Challenges Encountered
- New Requirements
- Anything Else?

Discussion

Next Steps

Executive Business Review

Kocak Holiday Group

Thank You

Cropper llc

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.