Case-Study Exercise: Module Ten

Case-Study Exercise: Overview

Purpose

This exercise will test the following knowledge and abilities:

Self awareness: Your ability to review your own personality, knowledge and experience in a rational and logical manner and to understand your own strengths and weaknesses

Career imperatives: Your general understanding of what direction you wish your career to progress in, and what knowledge, skills and experience you will need in order to fulfil your career objectives

Planning: Your ability to create effective plans for developing your career on a long term basis towards the fulfilment of your career objectives

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

In this final exercise, there is no fictitious case study to review, because for this exercise the case is *you*.

The first step for this exercise is to review the 14 Tenets of Customer Success that are described in Chapter 1 of the book *Practical Customer Success Management* and Module 1: Customer Success Fundamentals from the certification program. As you review each tenet, consider the tenet from the perspective both of your own current skills, knowledge and capabilities and also from the perspective of your skills, knowledge and capability needs as you progress in your Customer Success career. You may decide to make notes as you go through this step.

In step two, download the *Personal Evaluation Tool* that was included within Module Nine of this certification program and then complete two versions of the tool. The first version should establish your *baseline* of where you are currently in terms of capabilities for each of the eight areas shown in the tool. The second version should indicate your *destination* of where your capabilities for each of the eight areas shown in the tool ideally need to be in order to progress your career forwards over the next six to twelve months.

In the final step for this exercise, create a simple plan of action for developing your Customer Success career forwards over the next six to twelve months. Your plan should include a title, a description, the desired outcome from performing the action, and a deadline for the completion of the action for each action you define within your plan. For this final steps you may decide to complete it on your own, or you may wish to share it with others such as a friend, colleague or manager to get their input and assistance.

Scenario

There is no scenario for this exercise – it's all about *you*.

MODEL ANSWER

There is no model answer for this exercise, since everyone starts from their own unique current position and undertakes a unique journey to arrive at their own chosen destination.

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?

Note: For this exercise there is *no model answer* so rather than rating your response in comparison to a model answer, you can either simply omit this step entirely or just give yourself an honest rating based upon how complete, how accurate and how great in quality your exercise efforts have been.

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.