



## **Case-Study Exercise: Module Eight**

## 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

*Customer health:* Your ability to understand the types of needs and requirements that customers are likely to have, based upon an analysis of their current situation.

*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

*Time management:* Your ability to manage your schedule efficiently and effectively to ensure that the most critical tasks are accomplished first and that you perform with optimum efficiency and productivity

*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

Read the scenario and review the accompanying Health Score dashboard and related information shown below and then perform the following two activities

#### **Part One: Interpreting Health Scores to Determine CS Activity**

Based upon the information provided within the scenario, provide a list of 25 activities you will take during the next Quarter (ie the next three months) to help maximize value for customers and for your company. Your answer should include some activities relating minimizing churn (especially for those customers with contract renewals coming up within the Quarter), some activities relating to expanding renewal deal sizes, and some activities relating to identifying one or more customers to approach to request their consent to be featured in a marketing case study video. Each activity should include:

- Reference: A name or reference code for the activity
- Client: Which customer the activity is being performed for
- Description: A short explanation of what the activity is
- Purpose: A short explanation of what challenge the activity will solve or help with solving
- Results: A description of the intended consequences/outcomes from completing the activity
- Measurement: A description of how the results will be measured or evaluated
- Duration: How much total time you will need to diarise for performing the activity (including things like travelling time or setting up equipment for example)
- Deadline: When you will want to have accomplished it by
- Dependencies: A list of any other activities that must be completed first
- Notes: Any additional observation that you wish to make about the activity

To help you with answering this exercise, a template has been created using Microsoft Excel, which you can download separately from the list of downloadable assets for this module. Alongside the template for your answer on Tab One, this workbook also provides a copy of the Health Score on Tab Two and the Model Answer for the exercise on Tab Three (make sure you do not review the model answer until you have completed the exercise and are ready to evaluate your own response). The Excel workbook is called *Exercise Eight Template*.

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, and you work for a software company called *Partner Paradise*, which provides a software-as-a-service tool for large technology vendors to help incentivize their reseller channel partners through the use of gamification principles to reward these partners' activities, behaviors and sales results (for example attendance on training courses, numbers of quotations, amount of revenue, etc). The tool provides a competitive leader board and enables

resellers to win various badges and certificates, as well as prizes that range in value. These are aimed both at the overall partner companies and at the individual sales people within those companies. The tool also enables vendors to analyze data inputted by their reseller channel partners to measure performance levels and to spot potential areas of weakness within a partner that they may be able to offer assistance with.

Customers are typically multinational “blue chip” companies with annual turnovers of \$500m up to \$20bn and with at least multiple hundreds if not multiple thousands of reseller partners that themselves range wildly in size from two or three person small businesses to multi-nationals.

You are a fairly recent starter to the small team of six CSMs working for *Partner Paradise* and you have been assigned 15 existing customers to manage, plus you will be expected to take on around a further five clients over the next Quarter (ie three months). You have been advised to expect the preparation and onboarding activities for these five clients to take up roughly half of your overall available time, leaving you the remaining half of your time to manage the 15 existing clients.

During your initial induction, it was explained to you that the priorities for the CS team at *Partner Paradise* are firstly to retain existing customers wherever possible in order to maximize renewals and minimize churn, secondly to prove existing value to customers in order to maximize expand opportunities and therefore to increase renewal revenues, and thirdly to gain advocacy from customers, with a particular emphasis on consent from suitable customers to use them within a series of new case study videos that showcase the company’s services, which the Marketing team are keen to create for the upcoming website refresh in three months’ time..

The rest of your team are very busy and so they have not had a lot of time to provide a great deal of coaching and mentoring for you, beyond showing you where the bathrooms are, where to get coffee and how to log into and use the various corporate IT systems. One of these IT systems is the company’s Customer Success software tool, which you have been given a brief introduction to. You have been shown how to log in and access the “dashboard”, which provides you with health score information for a filtered list of just the 15 existing clients you are responsible for managing. Each component of the health score has been explained to you, and both the dashboard itself and your explanatory notes for each of its components are shown below:

<b>Client</b>	Name of the client
<b>Term</b>	Duration of the client as a customer measured in years
<b>ACV</b>	The annual value of the client's contract (annual client value)
<b>Renewal</b>	Months remaining until contract renewal
<b>Trend</b>	Direction of travel of overall health score
<b>Health</b>	Overall health score, comprising 50% Product, 25% Satisfaction, 12.5% Support, 12.5% Sponsorship
<b>Product</b>	KPI 1 = Combination of number of logins, average duration of logins, and features used
<b>Support</b>	KPI 2 = Combination of % of cases satisfactorily closed within 48 hours, and ratio of user help requests compared to problem reporting
<b>Satisfaction</b>	KPI 3 = Combination of annual client satisfaction survey results and 6 monthly NPS score results
<b>Sponsorship</b>	KPI 4 = Level of seniority of purchasing decision maker within the client's organization

	KPIs	Months	Trend
<b>Red</b>	0 - 50	0 to 3	Down
<b>Amber</b>	51 - 74	4 to 6	Level
<b>Green</b>	75 - 100	7 to 12	Up

Client	Term	ACV	Renewal	Trend	Health	Product	Satisfaction	Support	Sponsorship
Customer 1	3	35,000	1	Level	78	78	84	72	70
Customer 2	1	25,000	4	Up	70	81	63	70	40
Customer 3	2	42,000	7	Down	84	81	91	89	80
Customer 4	5	38,000	9	Down	53	54	56	63	30
Customer 5	0	12,000	3	Level	70	69	78	50	77
Customer 6	1	36,000	2	Level	45	34	44	50	89
Customer 7	1	19,000	1	Down	77	90	70	69	50
Customer 8	1	68,000	4	Up	63	45	82	76	80
Customer 9	3	22,000	6	Level	47	45	31	60	76
Customer 10	2	34,000	11	Up	52	45	37	90	70
Customer 11	3	27,000	5	Level	80	80	87	82	60
Customer 12	0	23,000	9	Down	41	32	no data	45	70
Customer 13	4	18,000	3	Level	60	78	30	76	30
Customer 14	5	30,000	6	Level	52	40	69	63	55
Customer 15	3	21,000	6	Level	74	74	82	78	50

Product	Satisfaction	Support	Sponsorship
78	84	72	70
81	63	70	40
81	91	89	80
54	56	63	30
69	78	50	77
34	44	50	89
90	70	69	50
45	82	76	80
45	31	60	76
45	37	90	70
80	87	82	60
32	no data	45	70
78	30	76	30
40	69	63	55
74	82	78	50

## **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.

Note: Due to its size, the Model Answer for this exercise has not been shown here, Instead it has been provided in Tab Three of the Excel Workbook that also incorporates the exercise template in Tab One, and a copy of the Health Score itself in Tab Two.

## 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	
<b>Your TOTAL Score</b>	

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.