

CUSTOMER SUCCESS INTERVIEW EXERCISE

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client**success**
REDUCE CHURN. INCREASE EXPANSION.
MAXIMIZE REVENUE.

ASSIGNMENT 1: INDIVIDUAL CONTRIBUTOR

Exercise for applicants applying for CSA, CSM, Sr. CSM or
Customer Success Director role

INDIVIDUAL CONTRIBUTOR EXERCISE OVERVIEW

The ability to prioritize and execute is critical in the Customer Success profession. As the Customer Success organization, our primary objective is to ensure we are clearly aligned to our customer's goals and success criteria and that we are proactively orchestrating a program to help them achieve these objectives. As a result of our efforts, we hope to drive customer **retention, growth** and **advocacy**. This exercise asks you to demonstrate how you prioritize and drive business impact. Please see the customer data on slide 4; you are provided with a list of customers and details about their account:

- Account Name
- ARR
- Renewal Date
- Licenses Purchased
- Customer Success Team Size
- Account Details

Using the customer information provided, complete the following:

- In 10 slides or less, outline how you will prioritize your book of business to drive positive business impact
- Think about the state of each account and what you will need to do as a CSM to drive the outcomes outlined above
- Be prepared to speak to your prioritization criteria and your next steps
- You will only have 30 minutes to present this assignment including intro, presentation and Q&A

INDIVIDUAL CONTRIBUTOR CUSTOMER DATA

Customer Name	ARR	Renewal Date	Licenses Purchased	Team Size	Account Details
Sample 1	\$25,978	12/31/21	19	60	Give some sample anecdote of the account - Maybe they are at risk or there is a large opportunity; provide context about the account to give the candidate something to think about ex) The new Exec Sponsor has not engaged with the team and has declined the upcoming EBR meeting OR Customer recently served as a reference and will be participating in an upcoming webinar series.
Sample 2	\$85,211	11/18/21	60	72	
Sample 3	\$32,651	3/9/22	25	30	
Sample 4	\$10,321	9/1/21	5	5	
Sample 5	\$30,999	6/1/22	22	21	
Sample 6	\$125,192	7/15/22	80	120	
Sample 7	\$91,234	8/19/23	67	75	
Sample 8	\$15,094	10/22/21	11	8	
Sample 9	\$63,545	2/28/22	50	60	
Sample 10	\$9,328	1/1/22	5	5	

**** Please note that all customers and data are made up as part of the exercise. This is not actual customer data.

ASSIGNMENT 2: CS LEADERSHIP EXERCISE

Exercise for applicants applying for Manager, Customer Success, Sr.
Manager, Customer Success, Director of Customer Success, Sr.
Director of Customer Success, VP of Customer Success

CS LEADERSHIP EXERCISE OVERVIEW

As a Customer Success leader each quarter you will work to set your specific business objectives to help move the business forward. These objectives will include revenue metrics as well as project specific initiatives.

Please reference the goals outlined on slide 5 to complete the following:

1. In 10 slides or less, prepare a deck that will help me understand how you prioritize and execute
2. Provide context on how you have decided to prioritize these initiatives and what you will do to achieve these goals
3. Give timelines, strategies and tactics
4. Outline how you will measure if this goal has been achieved and the business impact
5. You will only be given 30 minutes to present – this will include introductions, presentation and Q&A

CS LEADERSHIP EXERCISE DATA

GOALS

1. Reduce logo churn by 2% for this quarter over last year, same quarter
2. Increase NRR by 3% for this quarter over last year, same quarter
3. Help grow the customer advocacy program to support with customer marketing initiatives
4. Come up with OKR 4
5. Come up with OKR 5

THANK YOU