CASE STUDY

Customer Adoption Scoring Model

AT A GLANCE

Challenges

- Silo'd data sources prohibited a centralized, consistent view of customer health or maturity
- Overly high volume of available data points including usage, implementation configuration, live tracking, financials, educational and services made analysis difficult and confusing
- Proprietary niche industry metrics made value portrayal difficult without established benchmarks or comparisons

Benefits

- Centralized reporting combined all customer-centric data sources into single BI solution
- Simplified methodology turned complex metrics into more meaningful scores and BI charts
- Rapid assessment and comparison of customer adoption and health

OBJECTIVES

A mid-size customer engagement SaaS company wanted to enhance their quantitative customer value story telling while empowering customers with increased awareness of their platform adoption and maturity and compel them to keep pace with peers in their industry.

The analysis needed to be easy for all departments to access, understand and act on, and would require simplifying abstract, niche metrics while establishing baselines of what "good" looked like to power comparative analysis across customers and segments (e.g., vertical, tenure, region, use case). The data needed to be easy to share and communicate to both customers for quarterly and annual planning as well as internally for tracking customer trends and opportunities.

SOLUTION

Leveraging the company's extensive product telemetry data and existing BI platform, I planned and built a proprietary, multi-source scoring model made up of 5 categories, each with 3-5 scores based on specific metrics with values ranging from 0-10. A score of 10 represented either the best possible value (e.g., 100%), the maximum metric value attained by any given customer in real-time, or a pre-determined benchmark set by the company. Scores were created using extensive data manipulation, calculation and comparison functions.

I then created various BI dashboards focused on 5-point radar charts offering quick visualization of any customer's 5 category scores in real time along with their overall rolled-up score, allowing for easy visual comparison across segments. Finally, I created training materials and enabled key stakeholders on trend and health analysis for investor audiences, quarterly assessments with customers, and comparative analysis for sales, marketing, customer success and product teams.

BENEFITS

Centralized Reporting

Every department using the same dashboard visualizations and scoring model fostered a shared understanding and consistent communication of customer usage and stories.

Simplified Scoring Model

introducing scores allowed more complex, niche metrics to be abstracted and generalized, equal in their value and weighting with all other metrics and simpler to communicate and compare.

Rapid Evaluation

Transforming 20+ complex data points into simpler scores and radar charts made analysis and interpretation easier and faster and empowered the business with clear action steps.