Case Study Guideline

You work for the Customer Success Data & Analytics Team as a Customer Success Insight Analyst (CSI). As a CSI your main goal is to drive **actionable insights** to our stakeholders enabling them to make strategic decisions.

One of our main stakeholders contacted our team to provide insights into the Customer Experience and how we performed against target over the period of the last fiscal year. This stakeholder is the Global Product Support (GPS) leadership team, which focuses on delivering world class technical support to all of our customers.

Customers tells us about their experience with GPS through a transactional survey that is sent to each customer after their support case is closed. We measure both Customer Effort Score (CES) and Agent Satisfaction (ASAT). Our customers are spread across the Globe, have purchased different offerings, products, and contact support through various modalities for different reasons.
Besides reporting the CES and ASAT Rates, the main ask is to provide insights into what a good and bad customer experience look like. What dimensions and operational metrics influence the customer experience?

Your task is to provide actionable insights to the stakeholders in the upcoming meeting.

The goal of the meeting:
In the upcoming meeting, GPS Leadership expect you to provide any insights based on your analysis on CES and ASAT. They are looking for a productive discussion as well as recommendations on potential focus areas with certain findings. You will be the main driver of the meeting.

Minimum expectations for that meeting:
- Drive the conversation by displaying the analyses you have done
- Provide any other insights you can think of that are relevant to this analysis
- Recommendations on focus areas for our stakeholders
- The output of the analysis with its insights can come in the form of
    o PowerPoint slide deck
    o Excel files (xlsx, csv)
    o Tableau package workbook
    o Power BI visualization
    o Or, you can use any other tool of preference

Data Structure:
The dataset provided is the data you will need to provide the above-mentioned insights. In there you will find 3 tabs:

- Survey Data – Survey Results and Enriched Operational Data from the last year
- Case Data - Additional Operational and Customer Data that should be used in your analysis
- Definitions

Hint: Before visualizing and providing insights, attention to detail to the definitions tab is important.

You can expect an engaging conversation, as the GPS Leadership are very interested in this analysis – get ready for several questions from them while you will be sharing your output.