

Interview Type: Product Case Study

Congratulations on making it to the case study round!

Our hiring and selection process is highly selective as Justworks operates in a complex domain space of payroll, taxes, benefits, and so much more! So pat yourself on the back and get ready!

As a Group Product Manager candidate, you have already demonstrated a strong foundation of resource management, product acumen, and business impact. This next step is designed to assess how you think and operate as a strategic leader by driving clarity, alignment, and outcomes across teams and domains.

Case Study Prompt: Customer Service Support Products

Justworks' customer service is valued as one of our primary differentiators in the market, and a core part of our operations that we plan to protect and bolster as we scale as a company. We believe small businesses should be able to access and work directly with real people to solve their most complex problems, and we are investing in our tooling to directly support this. Importantly, our customer interactions – calls, emails, chat – serve as an informative proprietary data set for us to learn from and action off of within our tooling.

Justworks is building a new application for its Customer Success Organization (CSO) that consolidates data and internal tooling across our product offerings into a single place for CSO to service our customers. The application, "Customer Central", should allow CSO to carry out routine tasks, understand complete profiles about our customer companies and the employees of those companies, and ultimately give them information necessary to provide a best-in-class customer experience for small businesses.

One of the opportunities a single interface for CSO opens for our business is a mature set of features that help our team understand the status and health of our customer accounts. We aim to ensure our CSO is informed enough to handle the direct problems they will encounter on a call, but also pre-empt problems before they arise and proactively provide support and services that the customer may not know they need yet, including opportunities to utilize additional areas of our product offerings.

What data and tooling in a **Customer Health Dashboard** would be relevant for a customer support team member to fully understand the profile of the person, and their company, during an encounter?

Instructions for Candidates

We are excited to spend an extended period of time (75 mins) discussing your strategic proposal and then engaging in a workshop (designed & led by you) with the goal of working collaboratively towards a rough MVP. Please see additional requirements on both parts of the Case Study below:

1. Strategic Proposal Presentation (20 minutes to present, 10 minutes for questions) –

Instructions: You can assume everyone in the room will have read your proposal in advance, so adjust your presentation approach accordingly. There are no specific requirements in terms of *format* (Ex. Google Slides, PowerPoint Slides, Prezi, etc.) by which you present your product proposal, but the *content* should cover your recommendation for how we can enable CSO to have a comprehensive understanding of the current health of our customers.

Feel free to make assumptions in the absence of perfect information, as long as your assumptions are clearly stated. The proposal should include the following:

- An overview of the problem, context, and business opportunity
- Proposed phases of the project and a high-level roadmap
- Requirement and acceptance criteria list for a Phase 1 MVP
 - Basic wireframes, including sample data points, measures, and proposed user interaction details
 - Data requirements, including expected information in the production schema, logs, or other third-party sources that will be surfaced in the tool
 - Proposed engineering resources, including those from our Data Services team
- Open questions or dependencies
- Success metrics and rationale
- Rollout and training plan
- Rationale behind why your recommended requirements are advisable for an MVP
- A list of what, if anything, is out of scope for now but worth revisiting
- A list of 2 or more feature requests you anticipate in future versions

2. Design & Facilitate a Mini Workshop (45 minutes to run)

Instructions: After setting the strategic backdrop in your proposal, please shift into facilitating a 45-min workshop with the same Justworks Engineering and Design leaders. The goal of this workshop is to collaboratively scope and agree on a minimum viable product (MVP) for how to enable CSO to have a comprehensive understanding of the current health of our customers

- You are responsible for leading the workshop in whatever way you deem most effective. As a reminder, the exercise / discussion you lead should guide the group toward a clear, tightly scoped MVP definition.
- Materials:

- If you are coming onsite to our office at 55 Water Street, you will have a whiteboard and markers in the room available for use
- If you are remote, we defer to your preference for a medium to collaborate. Options include Figma, Miro, Google Doc, etc. – just please ensure access to the medium of your choice will not be an issue during the interview