

# FY26 Calibration Self-Assessment

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## Executive Summary

In FY26 I focused on foundational investments in AI-enabled capabilities and infrastructure that will deliver compounding returns. I built the Airtable tracking system serving 16 global activation/onboarding specialists, developed ICM Prophet as a transformative AI vision for hydraulic modelling, and established proactive licensing risk mitigation that has significantly reduced customer disruption.

These foundational efforts—though largely invisible in daily operations—position Customer Success to operate more efficiently in the AI era. Deep AI learning enabled building production tools (Copilot chatbots, automated licensing systems, security analysis), establishing frameworks for the FY27 vision of integrating multiple data sources to surface knowledge for CS teams.

### 1. Did you accomplish the goals set at the beginning of FY26?

**Partially.** The challenge stemmed from KPIs spanning five distinct domains (licensing, activation/onboarding, AI/MCP strategy, ICM Live, senior support) that would typically occupy 2-3 full-time roles. I made strategic prioritisation choices favouring long-term value.

**Achieved:**

- **Licensing Systems Support:**
    - Handled complex Thales licensing cases including **Severn Trent** (account targeting confusion blocking Deal Desk) and **Tideway** (30-day emergency server licence + dongle-to-Thales migration with overnight monitoring).
    - Resolved a critical licensing crisis escalated to the **National Director level**—unblocking all ICM users in 30 minutes via call.
    - Leveraged AI connectivity to the **Innovyze EMS platform API** to create automated tools for querying licensing data.
  - **Activation and Onboarding:**
    - Built the tracking system used by all **16 global Autodesk Technical Activation Specialists** and Tech Onboarders.
    - Handled **141 activation cases** and **74 technical onboarding cases**.
    - Initiated data filtering work with **Daniel Morrin** and **Laura Turnbull** to target the ~75% false-positive rate.
    - Coordinated Onramp migration alignment with **Sam Mezger**, **Heather Landgraf**, and **Diana Villa**.
  - **AI and MCP Strategy:**
    - Authored the **ICM Prophet** strategic vision document; presented it to **Mott MacDonald** (Newcastle) and **Boaz Brudner**, who endorsed the approach.
    - Discovered a security vulnerability in the **InfoWorks installer** using AI analysis.
    - Created and led the weekly **CS AI Tiger Team** and developed AI Copilot chatbots for KCS article creation and Salesforce retrieval.
    - Participated in the Denver meeting with Keith's team (**Samer Muhandes**, **Boaz Brudner**, **Mike Maylone**) to shape the AI vision.
    - Supported **Nathan Gertz**'s hackathon with strategic guidance.
  - **ICM Live Support:**
    - Managed production of **20+ training videos** with the content team via biweekly meetings.
    - Held a **weekly ICM Live meeting** with Mel and Sudan to align on support cases, discuss sales initiatives, and coordinate training efforts.
    - Managed **ECS Vapour VMs** for troubleshooting and helped the AMER Sales team set up demonstration environments.
- Deprioritised:**
- **ICM Live training completion:** Videos produced but not published due to strategic uncertainty regarding the product's viability.
  - **Routine case volume:** Deprioritised since October (transitioned to Nader) to focus on high-value AI strategy and complex licensing.
  - **Formal AI strategy document:** Focus shifted to practical implementation and tools over static documentation.

## 2. What are your most significant accomplishments over the last year?

### Airtable Infrastructure for Global Activation/Onboarding

While listed as a goal, the *accomplishment* is the systemic impact. I built the operational backbone for **16 global specialists** from scratch where no infrastructure existed.

- **Global Consistency:** Enabled consistent global operations, statistical visibility, and automated workflows.
- **Efficiency Gains:** The filtering tools designed to eliminate the ~75% false-positive rate have the potential to increase specialist productivity by 3-4x.
- **Redesigned Wikis:** Updated Customer Success wiki pages using AI assistance to match the new workflows.

## ICM Prophet & Deep AI Strategy

Beyond the presentation mentioned above, this accomplishment represents a complete product strategy that turns natural language into executable ICM workflows.

- **Market Differentiation:** Makes complex modelling accessible to engineers whilst creating commercial opportunities through consultancy.
- **FY27 Roadmap:** Positions us perfectly to integrate multiple data sources to surface knowledge for CS teams.
- **Production Tools:** Built functioning AI Copilot chatbots (soon to be integrated with Teams) and an AI-optimised ICM help file that enables agent-based search across multiple pages.

## Proactive Licensing Risk Mitigation

Transformed licensing from reactive firefighting to a proactive system.

- **Quarterly Reporting Cadence:** Established automated reporting for prior-version Thales licence expiries, distributed to regional sales managers and CS leadership.
- **Prevention:** This system significantly reduced surprise expiries and the manual data gathering time required to track them.

## 3. What skills did you intentionally develop this year and how did you apply them?

### AI/ML Tool Development and Prompt Engineering

Primary focus: learning to *build* AI tools, not just use them.

- **Skills:** Prompt engineering, agent design patterns, confidence threshold frameworks, API integration, and production deployment.
- **Application:** Applied these frameworks to build the Copilot chatbots, AI-optimised help files, and automated licensing tools.

### Airtable Database Design and Workflow Automation

Developed advanced capabilities for enterprise workflow management.

- **Skills:** Interface design, status taxonomy design, data validation, and statistical dashboard creation.
- **Application:** Applied to the activation/onboarding system, specifically improving data quality through taxonomy cleanup and field rationalisation.

## Strategic Thinking and Systems Analysis

Identifying systemic inefficiencies and designing proactive solutions.

- **Application:** Recognised the licensing crisis pattern to build the quarterly reporting system; assessed ICM Live's questionable viability to recommend the pivot to Exchange/Prophet; challenged backwards development approaches in the Denver meeting.

## 4. What areas do you feel were the biggest struggle for you?

### Balancing Competing Priorities Across Five Distinct KPI Domains

Managing KPIs spanning five distinct functional areas (licensing systems, senior IT support, activation/onboarding, AI/MCP strategy, ICM Live) forced difficult prioritisation decisions.

- **The Struggle:** These responsibilities typically occupy 2-3 full-time roles.
- **Lesson:** Foundational investments deliver compounding returns, whilst routine operational work can be delegated. I should have been more proactive communicating these trade-offs to stakeholders earlier.

### Navigating Organisational Readiness for AI Transformation

Significant effort developing ICM Prophet revealed a broader organisational readiness gap. Product leadership shows limited appetite for transformation, and the development team remains behind on modern AI capabilities.

- **The Struggle:** The Denver meeting had positive momentum, but my inability to attend in person (US travel) limited effectiveness.
- **Lesson:** Strategic vision requires organisational alignment. Focus on building capabilities for Customer Success that deliver immediate value whilst positioning for future integration.

### Personal Resilience and Mental Health Management

I have stabilised significantly from a mental health perspective this year. This was a very challenging year personally due to adverse circumstances, but I navigated it well considering.

- **Lesson:** Sustainable high performance requires ruthless prioritisation. Mental health stability enabled all other work (a significant personal win).

## 5. What two culture codes do you feel you exhibit best and why?

- **INGENIOUS (We reimagine what is possible):** I develop novel solutions through emerging technologies. *Evidence:* ICM Prophet represents an entirely new product paradigm; the Airtable system created structure where none existed; discovered security vulnerabilities through AI analysis.
- **RELENTLESS (We're unstoppable in the pursuit of results):** I pursue results despite obstacles. *Evidence:* Continued developing Prophet despite limited product leadership buy-in; persisted with licensing improvements despite internal friction; proactively built the Airtable system despite lack of existing infrastructure.

## 6. What two culture codes do you feel you exhibit least and why?

- **OPTIMISTIC (We believe in better):** I struggled to maintain optimism when faced with the gap between my AI vision and the organisation's readiness. At times, I allowed frustration with product leadership's limited vision to affect my energy. *Growth:* Focus on solutions within my sphere of control (CS enablement) and share progress to build optimism in others.
- **TRUSTED (We earn and build trust):** Whilst I deliver high-quality technical work, I struggled with consistent delivery on deadlines for deprioritised tasks (ICM Live training, formal AI documentation). *Growth:* Implement more rigorous project tracking and proactively communicate timeline impacts *before* deadlines pass.

## 7. Peer Feedback Nominations

- **Robert Dickinson:** AI expert who can assess technical quality and strategic soundness.
- **Andres Gonzalez:** Developer who can evaluate collaboration effectiveness.
- **Samer Muhandes:** PM with visibility into strategic thinking from Denver meeting discussions.

### Plaudits

- **Guillaume Chazal, Artelia Account Team (Applause Award):** "Your quick actions not only solved the issue but also prevented huge financial consequences for the customer... escalated to their National Director because of the severity."
- **Nicole Hathorn:** "This is exactly the proactive approach we need."
- **Ryan Farmer, Mott MacDonald:** "Amazing thank you :) This will help us move forward with the tool approval."

*Closing Perspective: The foundational investments are complete; FY27 is about scaling and delivering the compounding value.*