
# Customer Health Dashboard

# Who are we?

Testimonial Tree is the leading online reputation management company. Our testimonial software makes it easy for you to collect authentic testimonials from your customers, clients, peers and more.

Get positive online reviews, and collect customer satisfaction surveys with the easiest software for enterprises, small business, and individuals.

# Overview

One of the most important abilities a nimble SaaS company has is setting itself up to be proactively obsessed with its end users, which results in being able to better serve and capitalize on the opportunities we uncover in that outreach.

To enable this, one of the key tools many B2B SaaS companies will create is a “customer (or account) health dashboard,” a real-time view of the key indicators known to contribute to long-term retention of a paying customer.

For Testimonial Tree’s customers, we know someone is likely to renew if they’re leveraging our widgets, have testimonials coming in, their data feeds are all operating properly, they’re paying their bills, and they have users regularly signing in.

This project will require an understanding of the subscriptions, accounts, sales and retention cycles, and platform features behind what drives Testimonial Tree’s business. It’ll be a hugely valuable and widely-used initiative if done well.

# Success Metrics

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Although the top-level success indicator of a product like this is retention over time, there are other leading indicators it's working. Here's our 6-month, post-launch goals:

1

> +11% in avg. YoY monthly retention by count

2

$ renewed exceeds estimated cost of project

3

100% of customer success team views dashboard at least once per week

# Deliverables

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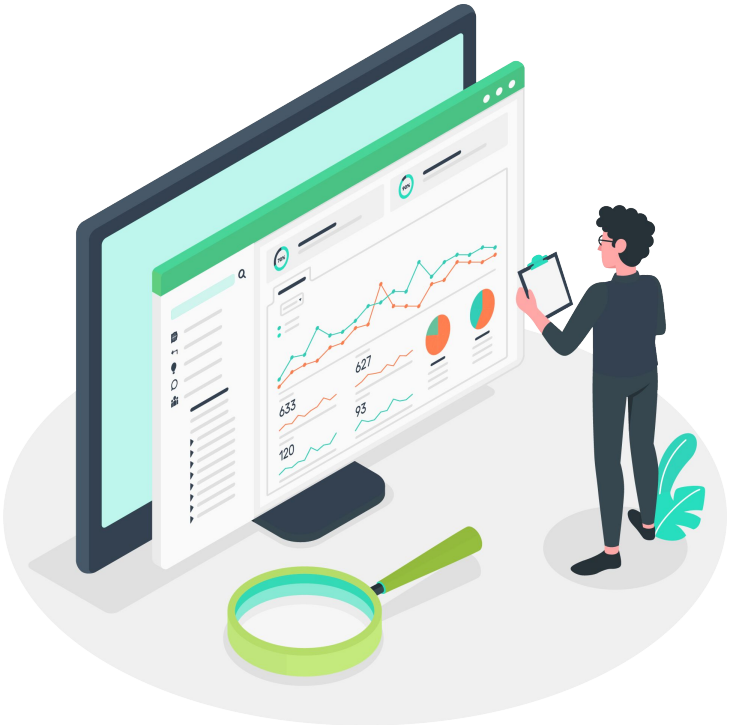
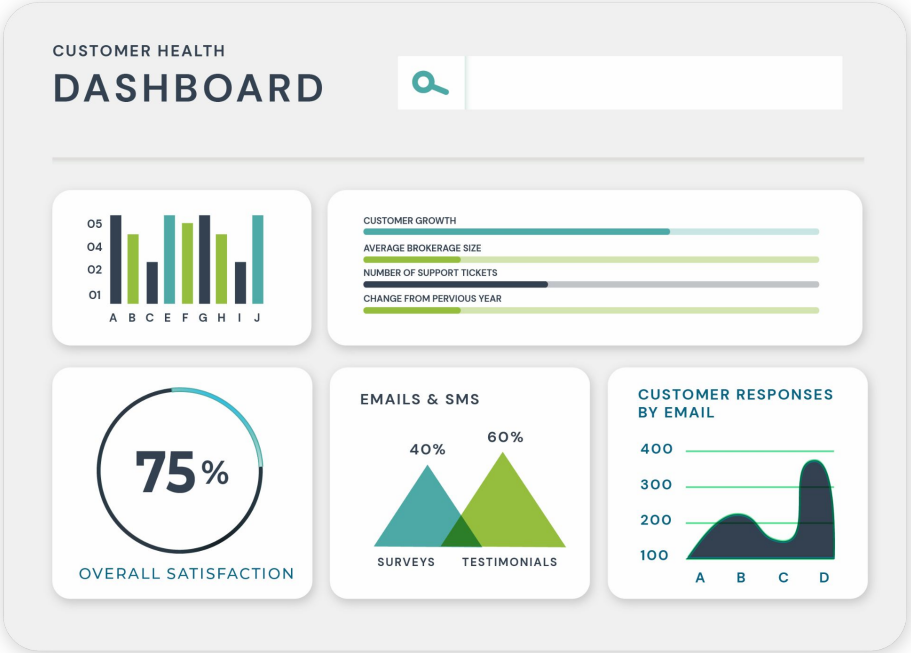
A great customer health dashboard will give a high-level, summarized view of key activities, but also support the ability to view the details for these indicators on an account-by-account level, with some priority in the UI given to higher dollar figure customer accounts.

*NOTE: This is not to be an overall company performance dashboard, that is a separate and out-of-scope project.*



# Data Source

To ensure this system isn't adding extra strain to our production systems, we'll want to create some sort of secondary data source that our Dashboard can draw from, still containing data that's as real-time as possible in reflecting reality.



# Application

A browser-based, responsive view should house the main functionality of the dashboard. In it, TT staff should be able to:

- See an aggregate view of the number of accounts that are healthy, borderline, and at risk, including trending over time for each segment
- View a sortable, searchable, clickable list of accounts with key figures, and the health score, category (healthy/borderline/at risk), and contract value (ARR) prominently visible
- Tapping on any account should show the trends for each key figure on the given account, so staff can get a fuller picture of what's been going on


# Thank You

For more info please contact:

James Gilchrist & Greg Lozada
engineering@testimonialtree.com

# Phase 1: Research & Familiarity

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After kickoff, we hope to have you leave with everything setup. You'll have access to: gitlab, slack, the database, etc. If there's anything else you, we'll get it as you need it; just ask.

- Database Familiarity: understand the core tables
- Web Application Familiarity: understand the core offerings of the application
- Brainstorm ideas of things you may want to accomplish by the end of the project

At the end of the day, this is your project. We are here to help and observe you in this process, but you'll be responsible for getting and delivering as much value as you can.

# Phase 2: Build Integration Testbed

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This project requires you to look at data that a Testimonial Tree customer generates on a regular basis to determine their level of health in our system, and visualize it accordingly in an internal dashboard used by Testimonial Tree support. To address most if not all cases, and avoid the use of client sensitive data, we want you to generate feeds that simulates the data a Testimonial Tree account ingests on a regular basis such as user and transactions.

- Create Rest API project.
- Create open endpoints that'll generate random data each day to simulate a working data feed.
- Create imporst using said endpoints to start generating data you can then analyze.

# Phase 3: Build an Application

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This is the fun part. Now that you understand the data you've produced in Phase 2. You will have to decide what facts or conclusions you can derive from this data, such as: statistics around transactions processed, users imported, surveys sent, etc. You'll the build a backend application and a front end application to serve and display these metrics.

Backend Application (.NET WebApi)

- Using EF Core to interface with the database
- Writing business logic in various services
- Writing controllers to serve data in JSON format
- Build custom tables if necessary
- Authentication and authorization are somewhat optional

Frontend Application (React Application using Vite and MUI)

- Fetch data from the API built in the backend application
- Using functional components to separate and reuse logic for rendering various components in the interface
- Using MUI as the component framework