Housecall Pro (HCP) Business Operations Case

Note: The purpose of this exercise is to give you a sense of the type of problem you'll likely be tackling on this team and help us understand 'how' you will deliver results in the first 60 days in this role. The dataset provided is something worked on by our team over the years Please aim for 5-10 slides that you will present to our team with your findings.

Prompt:
Housecall Pro, just like any SaaS business, is always looking to improve customer retention. However, as we have learned there is no silver bullet to churn reduction. Given the provided dataset explain what you see as the main drivers to churn and how we might mitigate it. **Be prepared to present your approach, findings, insights and recommendations to remediate churn. The level of depth and breadth you cover are up to you.**

Please consider the following as you prepare your presentation:
- This is a dataset we are familiar with and have analyzed on a recurring basis, you may need to go below first level insights
- Be prepared for questions about your approach, findings, and insights
- Ensure that you have a recommendation and, or experiment that you would want to test

Information About the Provided Data Set:

The provided data set includes a small sample of customers enrolled by HCP over the past several years. An enrollment represents the start of a subscription. The unique identifier is organization_id by enrollment_date.

A few decoder ring definitions:
- ENROLLMENT_PLAN = the HCP pricing plan / package
- ENROLLMENT_PROMO_TYPE = sales promotion offering in terms of duration of the promotion
- Acquisition Channel = last touch marketing attribution
    - SUPER GROUPS:
        - Marketing - Paid
        - Marketing - Unpaid
        - BD (= Business Development)
        - Sales: Call Outbound - either cold (prospects without HCP awareness)
        - Product: primarily Pro-to-Pro referrals from within the product
        - Innovation: sourced from HCP Pro communities (on Facebook) and

platform integrations (e.g.)
- F28 ACTIVE_RATE = measures the level of product activity / engagement for the customer during the first 3 28 days of their enrollment. If a customer churns within their first 28 days, the number represents their lifetime active rate
- F28_CC_FLAG = indicates whether the customer used the HCP payment processing capability during the first 28 days of their enrollment
- LTV / CAC = estimates the customers expected lifetime value at enrollment divided by the fully burdened customer acquisition cost