

Case Frameworks

8 Buckets

- Market Attractiveness
- Competitive Landscape
- Company Capabilities
- Customer Segments/Needs
- Profitability/Financials
- Strategic Alternatives
- Risks and Mitigations

Structure

1. Understand Case
2. Ask Clarifying Questions
3. Structure a Framework
4. Start Case
5. Solve quantitative problems
6. Answer qualitative questions
7. Deliver a recommendation

Sales Efficiency Case Framework

- Sales performance metrics
- Sales funnel analysis
- Lead generation quality
- Sales productivity, training, workflow, tools
- Customer feedback

Investment Case Framework

- Market attractiveness
- Competitive landscape
- Company attractive?
- Financial considerations
 - ROI, Acquisition costs reasonable?

Sales Efficiency Case Study

- Reduce CAC
 - Cost Analysis
 - Customer Segmentation
- Optimize Sales Process
 - Sales funnel analysis
 - Process Mapping
- Increase Conversion Rates
 - Lead Qualification

- Sales Training

Sales Growth Case Study: company not effectively capitalizing on its competitive product

- Explore Market Expansion
 - Market research, entry strategy
- Product Enhancement
 - Customer feedback
- Sales and Marketing Alignment
 - Collaboration and lead further
- Competitive Analysis
 - SWOT, Differentiation Strategy

Product Adoption Case Study

- Understand User Needs
 - Surveys
 - Comp Analysis
- Identify Barriers
 - Usability Testing (pain points)
 - Customer Support Analysis
- Improve User Experience
 - Re-design UI
 - Prioritize feature Development
- Increase User Engagement
 - User Education
 - Communications

Projects

Complexity

- Better AMC - Inhouse entity setup
- MPBA
- Spotify Product Documentation

Stakeholders

- Cross-sell (mortgage sales team, sales team managers, product owners, data analysts)
- MPBA (chief appraisers, valuation team, appraiser program admin, product team)
- Spotify Product Documentation

Ambiguity

- Inhouse pricing strategy and methodology
- Better AMC

Data Driven Analysis

- Sales Velocity
- Better Cover Conversion Analysis

Behavioral Questions Prep

STAR Method

Situation: Describe the situation you were in or the task you needed to accomplish

Task: Explain the goal you were working towards

Activity: Detail all specific steps you took and roles you played

Result: Describe your accomplishments and the overall outcome

Behavior Q's Examples:

1. Describe a specific problem you solved for an employer or team. How did you approach the problem? What role did the others play? What was the outcome?
 - a. Better: **Synthetic Bind.**
 - i. Problem: TAT to obtain bundled a quote was lagging, low conversion for engaged customers who were interested in a bundle because it required an additional few steps in communication to obtain all necessary customer data.
 - ii. Solution: Leveraging integration tool Zapier and partnering with product, I created a process with the product team for a one-click experience for the customer that would auto-populate their data so that our sales agents did not have to waste time searching for it on their own or asking customers for it.
 - iii. Result: This resulted in improved customer experience and shorter TAT for more bundled quotes
2. Tell me about a time when you encountered a challenging operational problem. How did you approach it, and what was the outcome?
 - a. Better: **Verbal TOS.**

- i. Creating process for verbal opt in to drive conversion. Sales agents blocked from quoting customers in real time over the phone causing clunky experience and lower attach rates.
 - ii. I dug into it, did research and proposed a case to compliance to allow agents to do that. I had to write a new TOS agreement for verbal and re-write the existing documented TOS and disclosures to ensure language was seamless.
 - iii. As a result we saw an increase in customer opt in conversion up to 5% (previously dependent on a digital opt in).
 - b.
- 3. Tell me about a time you failed to meet a deadline. What did you fail to do? What did you learn?
 - a. Better AMC:
 - i. Missed milestone to have partner AMCs. I relied on stakeholders to make connections with their network so that we could engage with them for strategic research.
 - ii. I ended up creating the copy and finding the network for them to just copy/paste messages and aid them in making the connection. I learned that once met with resistance, stay ahead of the curve by providing your own solutions.
- 4. How do you handle ambiguity? Describe a situation.
 - a. **Pricing strategy for inhouse AMC**
 - i. Came up with my own methodology, using available data on our partner charges, independent appraiser charges, and consulted with SMEs to see if still at market. This was also challenging because we did not have data on every region we wanted to reach, but did research. I wrote an analysis to defend my methodology and reviewed with legal on only one call. This allowed us to set pricing for our inhouse appraiser management company.
 - b. Defining geographic competency
 - i. Ended up drafting up our own policy to then be reviewed by our chief appraiser and legal so as to include in our terms of service for quality assurance
- 5. Can you provide an example of a project or initiative you've worked on where you had to collaborate with cross-functional teams? What was your role, and how did you ensure successful collaboration?
 - a. **MPBA:** led pilot to test hybrid appraisals with new vendor partner.
 - i. SMEs, Chief Appraisers, Valuations teams, product
 - ii. Testing hybrid appraisals (tech partner and in house appraisers)
 - iii. Led to shorter TAT, lower quality revisions, less delays in closing, lower cost than hiring other AMCs
 - b. **Better Appraisals:** lead new entity setup.
 - i. Worked with brand marketing, Chief Appraisers, Valuations team.

- c. **Cover X Sell:** Strategy team, Mortgage Sales Leads, Data Analytics, Product Managers.
 - d. **Content strategy: Competitive Analysis and Product Documentation**
 - i. Worked with Product Marketing, Product/Plugin Owners. We needed to create content for prospects and for our website. Worked with product marketing for creating the outline of the analysis and shared with plugin owners to input their content while I worked on the more business related content
- 6. Describe a situation where you had to handle multiple projects simultaneously. How did you prioritize your tasks and ensure everything was completed on time?
 - a. Keep a Weekly Goals doc, Weekly Tracker doc. Each linking to relevant docs including specific project plans and names of stakeholders.
- 7. Explain a situation where you had to create standard operating procedures or document processes. How did you ensure these were effective and followed by your team?
 - a. Better Cover Cross Sell: Now owning the initiative. Had to ensure adherence. I set up multiple trainings, refreshers, focus groups, slack channels. Met with Sales Managers to discuss incentives, what was working/not working. Worked with product managers to engineer automated solutions for sales members to follow the SOP not as manually.
- 8. Give an example of a project where you had to use qualitative and quantitative data to make improvements. What data did you use, and how did it impact the project's success?
 - a. Sales Velocity:
 - i. Situation: Too many customers coming down the pipe, leading to overwhelming sales capacity and complaining customers, no approach to prioritizing target customers.
 - ii. Task: goal was to push high quality customers to sales first.
 - iii. Activity: Ran analysis on maturity questions profile of customers and where they were in the sales funnel to identify which we should prioritize. I selected questions most indicative of conversion, built workflow around those to tag those as P1 customers and others as P2, then built a new marketing flow to allow P2 Customers to schedule first over P2. I built it in such a way that we could “turn it off / on” like a lever in case we did not have super high volume that week.
 - iv. Result: This resulted in reduced customer complaints of not being able to schedule as now that marketing comms set expectations, and us to more quickly identify highly qualified customers using the P1 and P2 labels.
 - b. Conversion Analysis:
 - c. Better Cover Cross Sell:
 - d.
- 9. Discuss your experience with stakeholder management. How do you ensure effective communication and collaboration with various stakeholders, including product managers, engineers, and operations teams?

- a. General: Structure and accountability is key. Set up recurring meetings with agendas, create project plans with a RACI matrix (Responsible, Accountable, Consulted, Informed), Priority Status, Due date, and links to relevant assets. Set clear action items with the owner assigned to it every meeting and a follow up to those AIs at the end. Maintain clean documentation
 - b. Spotify Partner management vs Internal Billing vs Compliance:
 - c. MPBA:
 - d. Cross Sell:
- 10. Describe a project where you needed to influence stakeholders who were initially resistant to change or a new approach. What strategies did you use to gain their buy-in and support?
 - a. **Cross Sell:** In charge of leading initiative, met with resistance from compliance and mortgage sales managers. Created SOP tailored to compliant language in scripts, and had to show sales managers the value of better cover by providing data around homeowner closing period when using Cover. Overall initiative led to an additional 10% increase in conversion.
 - b. MPBA: chief appraisers were hesitant to implement hybrid model of appraising, which consisted of using a third party partner to perform the physical inspection and take photos, then send to the appraiser for the valuation. They were skeptical of the partners ability to capture all necessary information, in addition to working with new software required to support that model. We piloted a program with just 10 counties and found that TAT was around 4 days shorter and costs were lower (leading to a shorter closing time overall). They were convinced of its value and ultimately trained to use the software and we were able to expand that project to additional statewide coverage.
 - c. Inhouse appraiser entity setup: met with resistance from Chief Appraiser and Vendor Management to create this entity, specifically at the point of needing their expertise and existing amc network relationships to reach out for connecting and asking guidance around amc setup. To solve for this, I ended up taking up some of the work and having one on one conversations to get their feedback on exactly why this was met with resistance and address the concerns.
 - d. Partnership Invoicing (internal and external influence)
- 11. Stakeholder feedback is valuable for improving processes and outcomes. Can you discuss how you have gathered and utilized feedback from stakeholders to make improvements in a project or process?
 - a. **X-sell:** sales managers and focus groups meetings to discuss their experience. Led to an improved automated system as well as incentive structure.
- 12. In a fast-paced environment, priorities can shift rapidly. How do you manage stakeholder expectations when project timelines or requirements change? Can you provide an example of a time when you successfully handled such a situation?
 - a. **X-sell:** I was dependent on product team to implement changes in internal platform and promised sales team they would have the ability for a simple 1 click experience which would auto-populate customer referral info, but product was not

able to deliver that. I still was able to cut other steps in the process down but delayed the 1 click experience.

13. Can you share an example of a time when you had to analyze sales data or market trends to make data-driven recommendations for improving sales performance?

a. Outbound sales

- i. Picked a particular segment of customers that had opted in but had not moved forward in the customer journey within 48-72 hours
- ii. Made a list outlining pertinent data (customer contact info, cheapest quote, highest coverage quote, bundle interest, timezone)
- iii. Made outbound calls with follow up comms depending on whether they answered or not, and response when answered. Tested whether times of day had any impact (found that afternoon was better than mornings)
- iv. Implemented this outbound sales strategy across the sales team, with SOP and designated times of day to call, daily quota

14. Provide an example of a time you used customer feedback to improve a product or service?

a. Customer Conversion Analysis:

- i. spearheaded market research by selecting a couple of segments of customers based on their customer journey to collect feedback on why they did or did not purchase our product.
- ii. I discovered that a vast majority of lost customers wanted a feature we did not have, which was to bundle their insurance product.
- iii. I recommended that we leverage our partnership with another insurance provider to provide these quotes, and work with product to update the user experience to include the ability to quote. We needed to update our API and sales flow/marketing comms to now show that we now provide bundling options.

15. Discuss a situation where things didn't go as planned and how did you handle it?

a. X-sell: led project:

- i. Created value proposition deck, training materials, met with sales managers, facilitated training, then layoffs hit, motivation was low, and according to our dashboards, virtually no one was making the calls.
- ii. Had to wait out the storm before jumping back into sales training to a resistant team. Worked with sales managers to understand the team's needs and create incentive structure as well as improve internal process.
- iii. One click experience dependent on product timeline and then priorities shifted and i had to level expectations.

16. Came up with a solution for a problem

Hypothetical Questions Prep

Hypothetical Q's Examples:

1. Imagine you are working on Gmail and a competitor starts charging a \$5 monthly fee for their product. How would you assess this situation, and what recommendation would you make on your team?
 - a. Conduct a competitive analysis including: features, user experience, value props
 - b. Pricing Analysis: analyze their pricing strategy. Is it significantly diff from Gmail? Assess how this pricing may change the market
 - c. Customer Feedback: collect customer feedback to identify pain points (both gmail and competitor)
 - d. Market research: Conduct market research to gauge customer performances, price sensitivities, willingness to pay for email services.
 - e. SWOT analysis
 - f. Cost-benefit analysis: calculate potential revenue impact of price matching
 - g. Customer segmentation: identify customer segments what may be more sensitive to pricing changes and those for whom additional features might justify a premium
 - h. Comp response strategy: develop the strategy. Could be price match, emphasize Gmails unique features, or explore alternative pricing models
 - i. Recommendation: if competitors product significantly outperforms gmail, no sense in raising the price until we enhance our features to justify. Alternatively, if maintaining competitive pricing is the priority, explore ways to optimize costs while retaining gmails value props. We want to balance profitability with market share and customer satisfaction.
2. If you were responsible for training Servicing Operations teams on a new process, how would you ensure that the training is effective and that the teams can successfully implement the new procedures?
3. You are working on a project that requires you to prioritize between two critical tasks with tight deadlines. How would you make the decision on which task to focus on first?
4. Suppose you identify a process that could be improved using data analysis. Walk me through the steps you would take to collect and analyze the data, make recommendations, and implement changes.
5. Imagine you're tasked with introducing a new project management tool or software to improve efficiency in the Product Operations team. How would you roll out this change and ensure team adoption?
6. If you were tasked with increasing the sales conversion rate for a product that was underperforming, what steps would you take to analyze the problem and develop a strategy for improvement?

Conduct thorough analysis. Review historical sales data to identify trends and patterns, drop off points in the funnel

Sales team feedback to understand common objections/challenges encountered during the sales process

Develop sales strategy, including refining the product messaging, adjusting pricing/packages, providing additional training and resources to sales team.

Regular performance monitoring and A/B testing is crucial to measure the impact of changes

7. Imagine Google is entering a new market with a unique set of challenges. How would you go about developing a sales strategy and operations plan for this new market?

Conduct market analysis to understand:

- i. Competitive landscape
- ii. Customer needs
- iii. Regulatory considerations

Identify target customer segments and develop buyer persona

- iv. Based on this, create tailored sales strategy including pricing models, distro channels, marketing strategies

Collab with marketing and legal

8. Suppose you are responsible for optimizing the sales process for a SaaS product. How would you design a metrics dashboard to track the key performance indicators (KPIs) and identify areas for improvement?

Identify KPIs relevant to sales process

- i. Conversion rates
- ii. Churn rates
- iii. Customer acquisition cost

1. $CAC = \frac{\text{total acquisition cost (marketing costs, sales)}}{\text{\# of new customers acquired}}$

Dashboard to also display customer segmentation, regions or sales teams

Incorporate a trend analysis and benchmarks to track progress over time

9. Google is considering expanding its product portfolio in a highly competitive market. How would you assess the market and develop a sales strategy to gain a competitive advantage?

Conduct a market analysis to identify gaps in Google's product:

- i. Size
- ii. Growth potential
- iii. Competitive landscape

Work with product development team to ensure new offering aligns with these identified market needs and provides unique value prop

Sales strategy: to highlight these differentiators, potentially through targeted marketing campaigns, pricing strategies resonating with target audience.

Close collab with marketing and sales essential to effective strategy

10. If you were tasked with reducing customer churn for a Google service, how would you approach this challenge, and what tactics would you implement to retain more customers?

Reducing customer churn. Analyze customer data to identify reason behind churn: conduct surveys, analyze customer support interactions, study usage

patterns to understand the root causes and develop targeted retention strategies. These may include improved onboarding experience, providing proactive customer support, offering loyalty incentives, customer feedback loop.

11. Imagine a scenario where a major customer is considering switching to a competitor. How would you approach the situation to retain the customer and prevent the loss of revenue?

Begin by understanding customer concerns and needs better. Offer customized solutions/incentives to address specific pain points and demonstrate commitment to success. Work with customer support and account management teams to provide service and seamlessness. REgular check ins and ongoing relationship is important to prevent future issues.

Product manager questions

How do you define success for a product you're managing?

I define success as delivering measurable impact through structured problem-solving, clear communication, and scalable processes.

At Better.com, for example, I led the go-to-market strategy for an internal venture in the appraisal space. Success there meant reducing turnaround times, improving quote conversion, and streamlining operational complexity. To achieve that, I developed a pricing methodology from scratch, navigated legal and compliance constraints, and built workflows that allowed our appraisers and partners to adopt the new model. Success wasn't just about launch, it was about adoption, scalability, and performance improvement.

In another initiative, I managed a cross-sell program where initial stakeholder resistance was high. Success here involved aligning sales, product, and compliance through a mix of structured SOPs, training, and incentive design. Over time, we saw a 10% lift in conversion. To me, that's product success: understanding pain points, iterating thoughtfully, and building buy-in that leads to tangible business outcomes.

Whether I'm optimizing sales processes, piloting hybrid service models, or rolling out documentation tools (as I did at Spotify) success always involves defining clear goals, tracking relevant metrics, and continuously surfacing insights that help teams move forward with clarity.

Tell us about a time when you had to work across engineering, design, and a commercial team?

At Spotify, I was brought on to support the go-to-market strategy for the commercial plugin launch of Backstage. This required coordination across engineering, design, product marketing, and the commercial sales team.

The engineering team was focused on building the plugin infrastructure, while the design team needed clarity on how the experience should flow for both internal users and external partners.

Meanwhile, the commercial team needed tools and documentation to explain the value proposition to prospects and ensure consistency in messaging.

I led the effort to create internal documentation and sales enablement tools that aligned technical specs with commercial needs. I partnered with engineering to understand the constraints and roadmap, collaborated with product marketing to draft positioning and training content, and coordinated with sales to identify gaps in the customer journey. I also created dashboards to visualize impact and created a feedback loop across teams to continuously improve the rollout.

The result was a 16% month-over-month increase in customer acquisition, and the work served as a template for future plugin launches. This experience reinforced my belief in structured communication and clear ownership as key to successful cross-functional execution.

What's your approach to product discovery?*

My approach to product discovery combines structured inquiry, stakeholder alignment, and evidence-based iteration.

I start by investigating the problem space: through stakeholder interviews, process mapping, and identifying root causes. At Better.com, for example, I conducted sales funnel analysis and customer segmentation to uncover where conversion dropped off and why. This allowed us to prioritize a solution that automated quote bundling and improved turnaround time.

When piloting a new product to support hybrid appraisals, I worked with engineers, operations, and compliance to test a small rollout in just 10 counties. I monitored turnaround time, revision rates, and closing speed. That pilot helped us validate the model before scaling it state-wide in multiple states.

Discovery is also about cross-functional insight by making sure commercial, design, and engineering perspectives are all factored into the process early on. I often create shared artifacts like kickoff briefs, journey maps, or light frameworks to align teams, clarify assumptions, and keep discovery focused on impact after ideation.

For me, good discover means identifying the right problems to solve and validating that they're worth solving before building anything at scale.

