SELECTED WORK / 01

Customer problems. Practical solutions.

Customer Success & Technical Account Management

Richard Nwachukwu

Anticipating customer risks and designing better customer outcomes.



FEATURED CASE STUDY

Preventing Uniform Stock Shortages

A customer success strategy for Adaeze Textiles, supported by a HubSpot prototype.

Group training project · Simulated customer data

Prepared by Richard N

CASE OVERVIEW

Preventing uniform stock shortages

A proposed customer success program for Adaeze Textiles

The business challenge

In the supplied scenario, Adaeze Textiles manufactures fabrics and garments in Kano. Balogun & Sons Schools Group orders uniforms for five schools twice a year. Rising enrolment and longer production lead times create a risk of ordering too little, too late.

The opportunity

Turn one CSM’s proactive intervention into a repeatable approach: track demand signals, investigate account risk, advise customers early, and coordinate with production.

What the group developed

A proposed customer success framework and a HubSpot prototype using simulated customer data. The presentation demonstrates enrolment analysis, account health scoring, and projected shortage exposure.

Capabilities demonstrated

Customer risk identification
Customer success program design
CRM prototyping and account prioritisation
Coordination between Customer Success and Support

PROJECT CREDIT

Accountability Group 4 · CSM/TAM training
Submitted to Digital Witch Support Community
Presented in Richard Nwachukwu’s portfolio as shared project work.

01 / CUSTOMER CONTEXT

Recognising risk before an order arrives

The original scenario establishes the need for earlier conversations.

A six-week head start

Ngozi Eze notices that school enrolment has risen over three terms. She contacts the procurement director six weeks before the new term and recommends a 15% increase in the next order.

Production pressure changes the advice

Factory lead times have grown from three to five weeks. Ngozi recommends ordering earlier, connecting customer planning with production constraints.

A successful scenario outcome

The school group places a larger order in time. All five schools receive uniforms two weeks before resumption. Separately, Support arranges replacements within 48 hours after a sizing complaint.

The question our proposal addresses

How could Adaeze repeat this level of proactive service as it takes on more customers, without relying on one person to remember every account’s ordering pattern?

Evidence boundary: these outcomes belong to the supplied scenario. They are not measured results of the group’s prototype.

02 / PROGRAM DESIGN

A repeatable customer success process

Customer information becomes a reason for investigation and action.

01 Maintain the account picture

Track order history, enrolment trends, term dates, order readiness, and production lead times.

02 Identify and investigate exposure

Compare customer demand signals with ordering plans. Review flagged accounts before recommending action.

03 Agree on preventive action

Discuss quantities and timing with the customer. Coordinate the agreed plan with production.

04 Review the customer outcome

Track delivery and recurring issues. Use the findings to improve the next ordering cycle.

PROPOSED ACCOUNT-HEALTH WEIGHTS

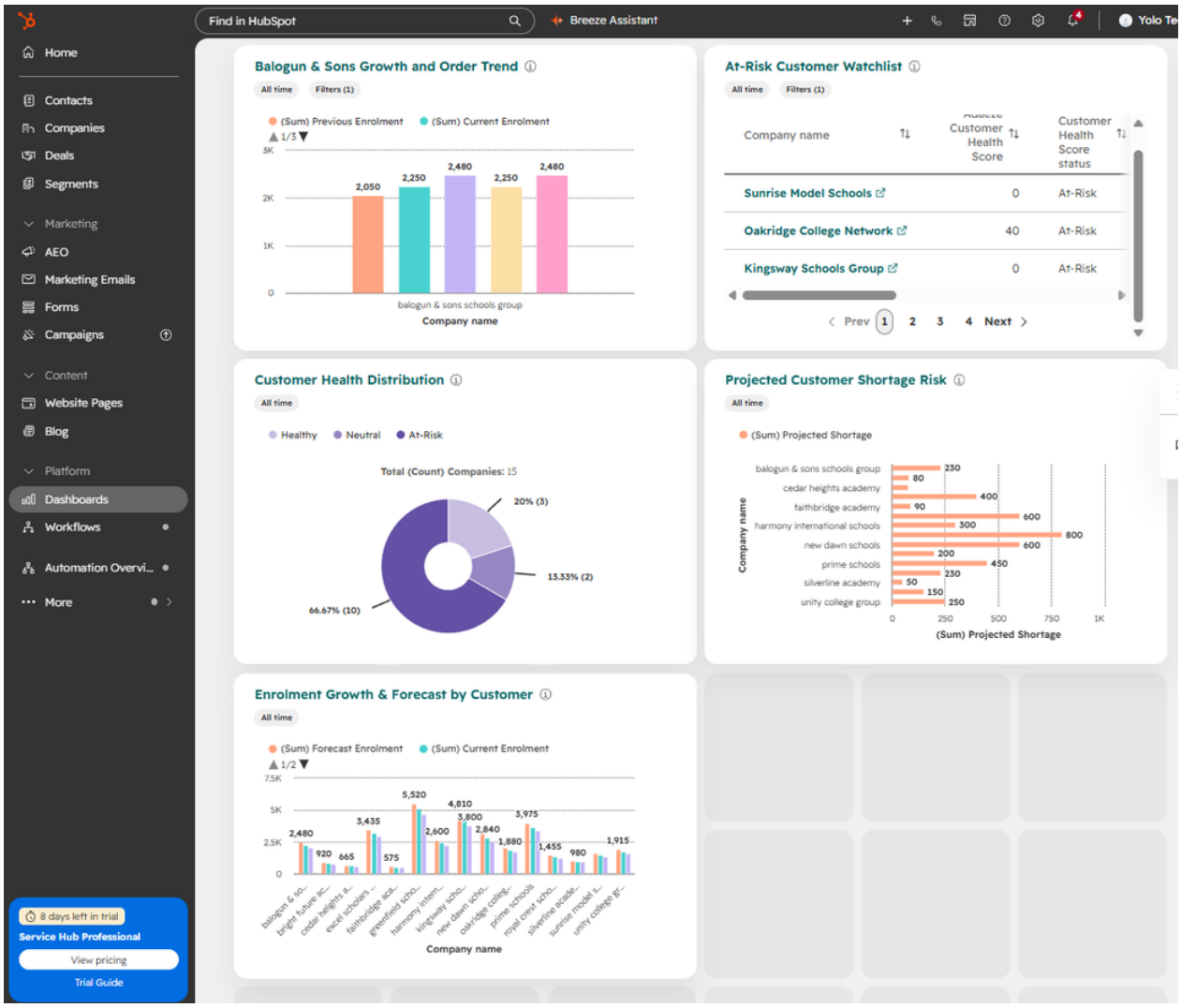
Order readiness	**30 points**
Payment health	**20 points**
Customer engagement	**20 points**
Customer sentiment	**15 points**
Customer value	**15 points**

These initial weights require validation. An at-risk flag prompts CSM investigation; it does not automatically mean an unhappy customer. The process remains proposed unless demonstrated in the prototype.

03 / CRM EVIDENCE

The HubSpot prototype

One place to inspect customer signals and prioritise account reviews.



EXTRACTED FROM THE PRESENTATION · SIMULATED DATA

The dashboard brings several customer views together. Its value is the ability to compare demand, customer health, and projected exposure before deciding which account needs attention.

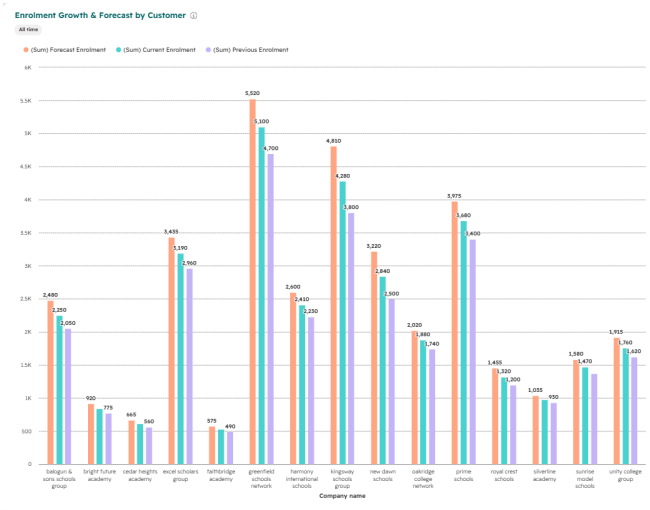
How a CSM would use this view

Review the signal, open the relevant account, validate the information, and prepare a specific customer conversation. A dashboard supports judgment; the customer's requirements still need confirmation.

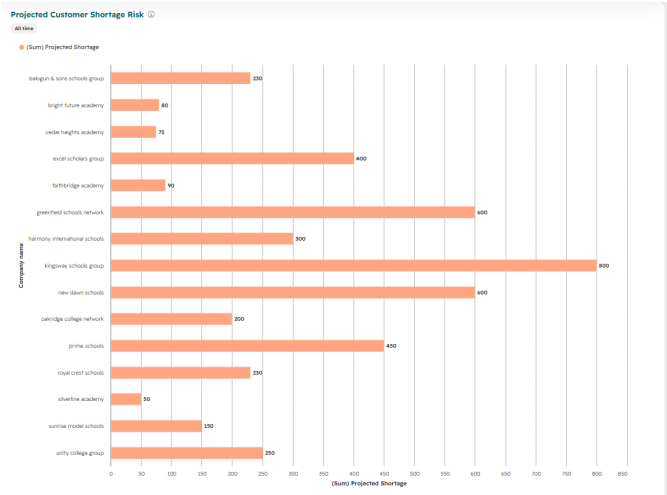
04 / ANALYSIS EVIDENCE

Demand growth and shortage exposure

Examples of the analysis shown in the supplied prototype.



Enrolment growth and forecast by customer. Comparing accounts helps identify where changing demand deserves an earlier review.



Projected customer shortage risk. The deck reports 4,505 projected units of shortage across 15 simulated accounts.

SIMULATED ANALYSIS

This is modelled exposure, not realised shortages, savings, or recovered revenue. Forecast calculations and assumptions require validation before operational use.

05 / SERVICE OWNERSHIP

Different responsibilities. A coordinated experience.

Customer Success anticipates problems. Support resolves reported issues.

Customer Success

Monitor account health, forecast demand, identify shortage risk, advise on order timing, and coordinate preventive action.

Customer Support

Receive and log complaints, investigate reported problems, arrange replacements, and track resolution.

The feedback loop

Repeated sizing, quality, or delivery issues should inform the account’s health assessment and success plan. Clear ownership helps keep both prevention and resolution visible.

Proposed success measures

On-time delivery and preventable shortage incidents would test the core customer outcome. Forecast accuracy would test the planning model. Repeat orders and support resolution time would add relationship and service context.

What still needs validation

The prototype has not established commercial impact. A pilot would need baseline data, agreed measurement definitions, clear ownership, and a review period before improvement claims could be made.

06 / IMPLEMENTATION OUTLOOK

A practical pilot before wider adoption

The next step is to test feasibility with a manageable customer group.

Data quality

Validate customer information periodically and compare forecasts with historical ordering.

CSM capacity

Segment accounts so the team can focus attention where it is most useful. Assess suitable alerts as workload grows.

Implementation cost

Pilot with priority school customers before committing to a broader rollout.

Forecast uncertainty

Use projections as decision support for customer discussions, rather than automatic purchasing instructions.

Why this work belongs in my portfolio

This shared project provides evidence of a structured approach to a customer problem: connect customer signals with a proposed operating process, demonstrate the idea in a CRM, and acknowledge what must be tested next.

PROJECT SOURCE & ATTRIBUTION

Adapted from “Adaeze Textiles Limited(1).pptx”, 16 slides, Accountability Group 4. All imagery and CRM screenshots in this portfolio were extracted from that presentation. Scenario facts and simulated analysis are identified throughout. Individual project responsibilities are not specified in the source deck.