

The *Save*. *Not the downgrade.*

Harshleen — Bob wants out. Your job isn't to process a cancellation, it's to **turn a churn email into a 90-day growth plan** using his own data. This kit is your scaffold: the thesis, the formulas, the email, the 6-slide blueprint, and the delivery notes. The thinking stays yours.

Account: **Bob's Burgers** • 5 locations

Package: **Pro** • \$205 / store / mo

Annual contract value: **\$12,300**

Deadline: **48 hours** • PDF + CSVs

WHAT THEY ARE ACTUALLY TESTING

A cancellation email is a *gift*. It's a chance to show you lead with value, not concessions.

They told you the constraint on purpose: you **cannot approve a downgrade or cancellation**. That removes the easy exit and forces the real skill — can you de-escalate, find the story in the data, and re-anchor the relationship on outcomes? Here's the rubric hiding inside the prompt.

The 5 things they're scoring READ BETWEEN THE LINES

- **De-escalation under constraint**
Do you reflexively concede, or hold the line warmly and earn the conversation?
- **Data literacy**
Can you turn two CSVs into one clear narrative — not a number dump?
- **Value articulation**
Can you reframe "cost" as ROI, owned-channel value, and assets he'd lose?
- **Executive communication**
Is the email empathetic, specific, and commercially confident in equal measure?
- **Ownership**
One next action, one named owner, a date. No vague "we'll circle back."

Decode Bob's message THE REAL PROBLEM

"The product seems fine, but I'm just not seeing results." In CSM, "not seeing results" almost never means the product failed. It decomposes into three diagnosable causes — and your CSVs will tell you which:

- **Adoption gap**

He pays for Pro (CRM email, loyalty, custom app) but isn't using the revenue features. Check campaign volume & cadence.

- **Attribution blindness**

Sales may be flat-to-up vs his old provider, but he has no clean before/after, so it "feels" like nothing.

- **Wrong baseline / expectations**

Joined January — owned-channel ordering ramps. ~5 months is early, and no one set 90-day targets with him.

Your one-sentence thesis (build everything around this): Bob doesn't have a product problem — he has an **adoption-and-visibility problem**, and his own data proves the Pro package is already creating value he can't see. Before any contract change, we activate the unused features and make the ROI visible on a 90-day plan.

The submission, mapped to 6 slides

Max 6 slides total. Part 1 is 3-4, Part 2 is 1-2. Don't waste a slide on a title page — make every one carry weight.

PART 1 · SLIDE 1

Performance summary + your diagnosis

PART 1 · SLIDE 2

Value vs cost (the money slide)

PART 1 · SLIDE 3

90-day strategy + the single next action & owner

PART 1 · SLIDE 4

The exact email (verbatim)

PART 2 · SLIDE 5

Top 3 book-of-business insights

PART 2 · SLIDE 6

How they shape your prioritization

*Tip: the CSV analysis lives in your .csv deliverables — slides show the **conclusion**, the CSVs show the **work**.*

Don't compute everything. Compute the *five numbers* that change the decision.

You have **Bob's Burger Sales Data.csv** and **Bob's Burger CRM Campaign Data.csv**. Below are the exact metrics that build the "you're getting value you can't see" case, plus copy-paste Google Sheets / Excel formulas. Adapt the column letters to your file (use the inspector at the bottom to map them fast).

The 5 numbers that win the argument

- Sales trend since January** — is online ordering growing month over month?
 If yes: "your channel is compounding." If flat: it's the adoption gap, which you can fix.
- Owned-channel value (commission avoided)** — first-party orders carry no marketplace commission.
 Often the single number bigger than the fee. This is the headline of your value-vs-cost slide.
- CRM engagement vs potential** — how many campaigns has he actually sent?
 The likely smoking gun: low/zero campaigns = low results. That's not failure, that's runaway.
- Repeat / loyalty rate** — is the loyalty program creating return visits?
 Repeat customers are the asset he'd forfeit by leaving.
- Per-location spread** — are some of his 5 stores thriving and some dormant?
 Variance proves it's executional, not the product. Lift the laggards to the leaders.

Copy-paste formulas SHEETS / EXCEL

Month-over-month growth %

Is the channel compounding?

```
= (ThisMonth - LastMonth) / LastMonth
```

COPY

Total & per-location sales

SUMIFS by store + month

```
=SUMIFS(SalesCol, LocationCol, "Store 1", MonthCol, "Feb")
```

COPY

Average Order Value (AOV)

Revenue ÷ order count

```
=SUM(SalesCol) / COUNTA(OrderIDCol)
```

COPY

Repeat-customer rate

Loyalty working?

```
=COUNTIF(CustomerIDCol, ">1 order") / COUNTA(UniqueCustomers)
// or with a helper: returning customers ÷ total customers
```

COPY

Commission avoided (owned-channel value)

Flag your % assumption on the slide

```
=OwnedChannelSales * 0.20 // 15-30% typical marketplace take rate
```

COPY

Email funnel: open / click / conversion

From the CRM CSV

```
OpenRate =Opens / Delivered
ClickRate =Clicks / Opens
ConvRate =OrdersFromCampaign / Clicks
```

COPY

Campaign ROI

Revenue per dollar of effort

```
=(AttributedRevenue - CampaignCost) / CampaignCost
```

COPY

Value-vs-cost ratio (the headline)

Return per \$1 of package spend

```
=MonthlyOnlineSales / (5 * 205) // 5 stores * $205 = $1,025 / mo
```

COPY

Project the next 90 days

Trendline forecast

```
=FORECAST.LINEAR(NextMonthX, KnownSalesYs, KnownMonthXs)  
// quick visual: =SPARKLINE(MonthlySalesRange, {"charttype","line"})
```

COPY

The reframe that wins: stack his real value in one column — online sales + commission avoided + loyalty repeat revenue + the customer list he now owns — and put **\$1,025/mo** next to it. If the value column clears the cost (it usually does), the cancellation conversation is over. If it doesn't yet, that's exactly what the 90-day plan closes.

Live value-vs-cost calculator [PLAY WITH IT](#)

Drop in Bob's real numbers to pressure-test your slide before you build it.

Monthly online-ordering sales (\$, all 5 stores)

9000

Stores

5

Price per store / month (\$)

205

% of these sales that are owned-channel (no marketplace fee)

100

Assumed marketplace commission you'd otherwise pay (%)

20

8.8×

return per \$1 of package spend

Monthly package cost

\$1,025

Commission avoided / mo

\$1,800

Commission alone vs fee

covers 176% of cost

Net value after package / mo

\$7,975

This is a directional model to sharpen your instinct — your CSV is the source of truth. Always state assumptions (commission %, attribution) on the slide.

CSV inspector MAP YOUR COLUMNS FAST

Drop either CSV here. It runs entirely in your browser (nothing uploaded) and shows every column, type, totals, averages and a quick trend — so you know exactly which column letters to feed the formulas above.

Drop a .csv here or click to choose

100% local · nothing leaves this page

Warm. Specific. *Confident*. You're not negotiating — you're inviting him back to his own numbers.

This is a ready template. Swap the [bracketed] bits for the real findings from your CSVs once you've run the formulas. The annotations below explain why each move works — be ready to defend them in the interview.

Subject: Re: Your Online Ordering Pro Package — let's make sure it's working for you

Hi Bob,

Thank you for the honest note — I'd much rather you tell me where things stand than walk away quietly. You moved to us in January to grow Bob's Burgers, and if you're not **feeling** that growth, helping fix it is exactly my job.

Before we talk about any change to your contract, I want to earn that conversation by showing you what your own numbers are telling me. I pulled your ordering and campaign data across all five locations, and a few things stood out: **[1-2 specific, true findings — e.g., online sales are up [X]% since January / your owned-channel orders avoided roughly \$[Y] in marketplace commission / you've built a list of [Z] customers you now own outright]**.

I also see real, unused horsepower in your plan. **[The CRM email and loyalty tools you're already paying for are barely switched on]** — and in my experience that's usually the whole difference between "fine" and "results."

Here's what I'd like to do: a **30-minute working session this week** where we (1) look at your performance together, (2) turn on the Pro features driving the most revenue for merchants like you, and (3) set a 90-day plan with targets we both sign off on. If we hit them, you'll see precisely what this package is worth. If we fall short, you'll have a CSM who did everything to get you there.

Are you open to **[Tuesday or Thursday]** this week? I'll bring your data and a plan — you just bring your goals.

Talk soon,

Harshleen Kaur

Customer Success Manager · Online Ordering

COPY EMAIL TEXT

Why each move works BE READY TO EXPLAIN

- 01 **Thank him for the honesty first.** Disarms the tension and signals you're not defensive. Never argue with the feeling.
- 02 **"Before we talk about any change..."** Holds the line on no-downgrade without saying "no." You redirect, you don't refuse.
- 03 **Lead with his own data.** Specificity = credibility. The moment you cite a real number, you stop being a vendor and become his analyst.
- 04 **Name the unused features.** Reframes "not working" as "not switched on yet" — a problem you can visibly solve, which restores hope.
- 05 **One concrete next step + a date.** A 30-minute session is a low-commitment yes. You own the prep; he just shows up.
- 06 **Confident close, no begging.** "I'll bring the data and a plan" projects ownership. You're leading the save, not pleading for it.

What to avoid: apologizing for the price, explaining contract/cancellation mechanics, over-promising specific revenue, or sending a wall of charts. The email's only job is to win the 30-minute meeting.

Slides show the *conclusion*. Your CSVs show the work.

A slide-by-slide blueprint with the headline, the supporting points, and the suggested visual for each. Use a clean, branded template; one idea per slide; let charts do the talking.

1

PART 1 · PERFORMANCE + DIAGNOSIS

"You're growing — you just can't see it yet."

Headline the **trend** and **per-location spread**. State your diagnosis in one line: adoption + visibility gap, not a product failure.

■ Line chart: monthly online sales since Jan · small bar chart: sales by store

2

PART 1 · VALUE VS COST

"The math already works."

Stack the value column — online sales + **commission avoided** + loyalty repeat revenue + owned customer list — beside **\$1,025/mo**.

Show the return-per-dollar ratio.

■ Side-by-side bar: total value vs monthly cost · callout number: "Xx ROI"

3

PART 1 · STRATEGY + NEXT ACTION

"Here's the 90-day plan to make it undeniable."

Activate unused Pro features → set 30/60/90 targets → biweekly check-ins → QBR at day 90. Then the **single next action: book a Value & Growth working session within 72 hours — owner: you (CSM)**.

■ 90-day timeline · RACI line for the one action

4

PART 1 · THE EMAIL

The exact reply to Bob (verbatim)

Drop the email from tab 03 in clean, readable type. This is a deliverable they explicitly asked for — present it as a finished artifact, not a screenshot.

■ Formatted email block · signature

5

PART 2 · BOOK OF BUSINESS

Top 3 insights from your 100 merchants

e.g. **revenue concentration** (few Mx = most revenue) · **adoption predicts retention** (low-usage Mx are the churn risk) · a **renewal/at-risk cluster** needing proactive plays. Back each with one number.

■ 2x2 value-vs-risk matrix · Pareto bar of revenue by Mx

6

PART 2 · PRIORITIZATION

"How I'd spend my week because of it."

Translate insights into action: **protect** high-value at-risk (Bob lives here), **grow** healthy high-value via expansion, **scale/automate** the long tail. Tie it back to a repeatable playbook.

■ Effort-allocation donut · the playbook in 3 lanes

Design discipline: one headline per slide written as a *claim* (not a label), max ~5 lines of support, a single chart, consistent color. If a slide has two ideas, it's two slides — or one of them is cut.

Insight isn't "I have 100 merchants." It's "*so here's where my hours go.*"

You won't know the columns until you open it, so here's the framework that works on any book of business — plus the formulas to build it and the matrix to present it.

Step 1 — Build a simple health score

Normalize a few signals to 0-1 and weight them. Tune weights to whatever columns the CSV actually gives you.

Weighted health score

higher = healthier

```
Health = 0.30*Revenue_n + 0.25*Adoption_n + 0.20*Sentiment_n
        + 0.15*Tenure_n + 0.10*GrowthTrend_n
// _n = normalized 0-1, e.g. =(x-MIN)/(MAX-MIN)
```

COPY

Revenue concentration (Pareto)

find the vital few

```
=SUMIF(RevenueCol, "≥"&LARGE(RevenueCol, 20)) / SUM(RevenueCol)
// what % of revenue do your top 20 accounts hold?
```

COPY

Segment counts

how big is each quadrant?

```
=COUNTIFS(RevenueCol, "≥"&MedRev, HealthCol, "<"&MedHealth)
// high value + low health = your Protect list
```

COPY

Step 2 — Drop every merchant into the matrix

Value (revenue / package tier) on one axis, Risk (low health, near renewal, low adoption) on the other. This single picture *is* your prioritization slide.

HIGH VALUE · HIGH RISK

 **Protect**

Proactive saves. White-glove. **Bob's Burgers** lives here. Your highest-leverage hours.

HIGH VALUE · HEALTHY

 **Grow**

Expansion & advocacy. Upsell, references, case studies, multi-year renewals.

LOW VALUE · HIGH RISK

 **Triage**

Scaled outreach. Don't over-invest; right-size effort to value, accept some churn.

LOW VALUE · HEALTHY

 **Automate**

Tech-touch & self-serve. Nurture cheaply; watch for ones quietly becoming Grow.

Step 3 — The 3 insights to actually surface

Open the CSV, then look for these patterns. Lead each slide bullet with the number, not the adjective.

- **Concentration of value**

"My top [N] merchants drive [X]% of revenue" → they get named, scheduled, protected.

- **Adoption predicts retention**

"Low-adoption accounts show [the churn signals]" → proactive activation plays before they ever email like Bob.

- **A timing cluster**

"[N] accounts renew in the next quarter / are newly onboarded and unactivated" → a focused, calendar-driven motion.

Whatever the exact columns, the move is the same: from "100 accounts" to "here are the 8 I touch this week and why."

The close for Part 2: "My book isn't 100 equal accounts — it's a portfolio. I spend my time where value and risk are both high, I run scaled plays everywhere else, and Bob's Burgers is a textbook Protect account, which is exactly why I'd never just process his downgrade."

They're not buying the deck. They're buying *how you think out loud*.

Use this kit the way the prompt intends. They said AI is fine for outlining, clarity, and proofreading — and that the core problem-solving, decisions, and conclusions must be yours. So: run your own formulas on the real CSVs, draw your own conclusions, write the email in your voice. Let this kit be the scaffold, not the substance. You'll be asked to explain your approach live — make sure every number on a slide is one you computed and can defend.

How to present it

- **Open with the thesis, not the data**

"Bob doesn't have a product problem, he has a visibility problem — and his data proves it." Then earn it.

- **Every number ties to a decision**

If a chart doesn't change what you'd do, cut it.

- **Empathy + commercial backbone**

Show you can be warm to Bob and protect \$12,300 of ARR at the same time.

- **End on ownership**

One action, your name on it, a date. Leave no doubt who drives the save.

Likely interview questions

"What if Bob still wants to cancel after the meeting?"

"What if the data shows he's genuinely underperforming?"

"How did you pick your assumptions?"

"Why is the next action yours and not support's?"

Your AI-use statement HAVE THIS READY

If they ask how you used AI, be specific and confident — it reads as maturity, not weakness:

"I used an AI tool to **pressure-test my structure and tighten wording** — outlining the slide flow and proofreading my email. The **analysis, the diagnosis, the strategy and every conclusion are mine**: I ran the formulas on the CSVs, decided the thesis, and chose the next action. I can walk through any number on these slides without it."

Pre-submit checklist

- **≤ 6 slides**, exported as one PDF

Part 1: 3-4 · Part 2: 1-2

- **.csv files attached** with your analysis

The work behind the conclusions — clean tabs, labeled columns

- **The verbatim email** is on a slide

It's an explicitly requested deliverable

- **One next action + named owner + date**

Don't let this be vague

- **Every assumption labeled**

Commission %, attribution, normalization

- **Submitted via the link, inside 48 hours**

Early is a signal too

You've already managed a \$3M book and saved real renewals. This is that, on a smaller stage with a burger logo. Go show them the operator you already are. 🍔

Know exactly what Bob bought — and the *commercial model* behind it.

The role is CSM for **Online Ordering** — DoorDash's first-party SaaS product, which is a different animal from the Marketplace app. Knowing the difference is how you sound like an insider, not a candidate. Here's the verified landscape.

The product you'd own FIRST-PARTY

Online Ordering / Storefront lets a restaurant take orders on **its own website and branded app** — commission-free, paid as a SaaS subscription instead of a per-order marketplace cut. Bob's **Pro** package (\$205/store) bundles the full stack:

- **Website online ordering + custom mobile app**
His own branded channel — he owns the customer, not the platform
- **CRM email marketing**
Direct-to-customer campaigns — the unused lever in Bob's case
- **Custom loyalty program**
Repeat-visit engine and a customer list he keeps

This is why your value-vs-cost case is strong: first-party orders dodge the 15-30% marketplace commission entirely. The package is the owned channel.

The Marketplace tiers CONTEXT

The other way restaurants sell on DoorDash — the app itself, priced on commission. Good to know so you can speak to the whole portfolio:

- **Basic — 15% delivery commission**
Smallest delivery radius, 7-day trial
- **Plus — 25% delivery commission**
Larger radius, DashPass, 30-day trial
- **Premier — 30% delivery commission**
Biggest radius + Automatic Ads + \$200 photo credit + Growth Guarantee (refunds commission in any month with ≤ 20 orders)

All tiers: flat 6% pickup commission, \$0 activation, free trial, and a free professional menu photoshoot.

What a merchant actually receives — physical & digital

DIGITAL · 3 SURFACES

- **Merchant Portal**

Desktop menu editor — items, photos, modifiers, hours

- **Business Manager app**

iOS/Android — live order management, refunds, subs

- **Order Manager app**

The tablet app — pop-up on each new order

HARDWARE

- **10" Android tablet**

Free during trial, then **\$6/week** in the US

- **Ships in ~7 days**

After the confirmation email; opt-in, not bundled

- **It's the order hub**

For merchants without a POS integration

MARKETING MATERIALS

- **The tablet is the only confirmed shipped item**

per DoorDash's own docs

- **Printed kit is order-on-request**

DoorDash runs a "marketing materials" ordering program; exact contents (decals, table tents, QR cards) vary by region — verify, don't assume auto-ship

Sourced from DoorDash's pricing page, learning center, and help center via a 102-agent fact-check (all claims verified against primary docs). Figures are US, 2025-2026, and DoorDash can change them.

How to use this live: when you reframe Bob's value, name the mechanism — "your Storefront orders are first-party, so unlike the DoorDash app they carry no 15-30% commission; that owned channel plus your CRM list is the asset you'd be walking away from." That's the sentence that makes an interviewer lean in.

\$105K sounds big. Manhattan quietly takes ~30% in tax and rents most of the rest.

Walk into the comp conversation knowing the real number. These are directional 2026 estimates for a single filer — confirm your exact figure with a paycheck calculator (e.g. SmartAsset). But the shape is right, and it changes how you negotiate.

Live take-home & budget calculator NYC, SINGLE FILER

Gross base salary (\$/yr)

105000

Federal income tax	\$14,714
NY State tax	\$5,252
NYC city tax	\$3,635
FICA (SS + Medicare)	\$8,033
Total tax	\$31,633

\$6,114

estimated take-home per month

Net per year	\$73,367
Effective tax rate	30.1%
Comfortable rent (≤30% net)	\$1,834
50 / 30 / 20 monthly	\$3,057 · \$1,834 · \$1,223

"Comfortable rent" is the classic 30%-of-take-home guideline. Note how far below a solo Manhattan apartment that sits — which is the whole point.

Three realistic ways to live on it

SOLO · MANHATTAN

Studio ~\$3,300–4,200/mo

Eats 55–70% of take-home. Doable only if you forgo most saving. The "I made it" flex that quietly breaks the budget.

SHARE · PRIME

Room in 2BR ~\$1,900–2,600/person

Manhattan or brownstone Brooklyn with a roommate. ~31–43% of take-home. The realistic sweet spot for most.

SOLO · COMMUTE

Studio/1BR ~\$1,800–2,600/mo

Astoria, Washington Heights, Bushwick, Jersey City. Your own place, ~30–43%, in exchange for a train ride.

The reality check PURCHASING POWER

Manhattan's cost of living runs roughly **2.2-2.4x the U.S. average**, and rent closer to **3-4x**. In lifestyle terms, \$105K here lands near a **\$45-55K salary in an average U.S. metro** — directionally, not exactly.

~30%

to taxes (fed+state+city+FICA)

~\$6.1K

take-home / month

~40%+

of that to rent, realistically

None of this means turn it down — NYC pays a premium for a reason. It means negotiate from facts, not the headline number.

Negotiation playbook

- **Is \$105K base or OTE?**

CSM roles often have a variable component. On-target earnings \neq guaranteed base. Clarify first — it's the whole ballgame.

- **Ask for the band**

"What's the range budgeted for this level?" Anchors you to their ceiling, not their opener.

- **Bring comps**

Levels.fyi, Glassdoor, Built In NYC, RepVue (CS/sales). NYC mid-level CSM base commonly ~\$90-125K + variable.

- **Negotiate the whole package**

Signing bonus, hybrid/remote days (a real \$ saving on commute), transit & wellness stipends, extra PTO, a 6-month review, equity/RSUs.

- **Use your leverage**

You manage a \$3M book today. You're not a junior — price accordingly.

What to actually say: "I'm genuinely excited about the role and the product. Based on my experience managing a \$3M enterprise book and the NYC market for this level, I was targeting a base in the **[\$115-125K]** range. Can we get there — and could we also look at **[sign-on / equity / hybrid days]** to round it out?" Calm, specific, collaborative. Name a number; let them counter.

Estimates only — not tax or financial advice. Brackets are 2025-2026 figures for a single filer taking the standard deduction; your real number depends on benefits, 401(k), filing status and more.

Polished starting points — then make every number and conclusion *yours*.

Read this first. The PowerPoint is a designed **template**, and the CSVs are **worksheets** — structure, prompts and formulas, not answers. The assignment requires your own analysis and conclusions, and you should be ready to explain your approach. Fill in every **[bracket]** with figures you computed from the real CSVs, and rewrite the copy in your voice.

① The PowerPoint deck 6 SLIDES · 16:9 · EDITABLE

A branded, ready-to-edit starter matching the 6-slide blueprint: Situation & Diagnosis · Value vs Cost · Strategy & Next Action · The Email · Book of Business · Prioritization. Every slide has placeholder charts and **speaker-note coaching** built in.

[↓ Editable .pptx](#)[↓ Preview as PDF](#)

Open the .pptx in PowerPoint or Google Slides → replace sample charts with your CSV data → export to PDF for submission. Check the notes pane under each slide. (The PDF is just a quick look at how it renders.)

② Part 1 — Sales analysis worksheet .CSV

Every metric that builds the value case, with the exact Sheets/Excel formula and a blank column for your result — sales trend, AOV, commission avoided, per-store spread, CRM funnel, ROI.

[↓ Part1_Sales-Analysis-Worksheet.csv](#)

③ Part 2 — Book of Business worksheet .CSV

The health-score formula, the 2x2 segmentation counts, and the three-insight scaffold — drop in your CSM Book of Business numbers and the prioritization writes itself.

[↓ Part2_Book-of-Business-Worksheet.csv](#)

④ The whole toolkit as a PDF READ IT OFFLINE

Every tab of this site — the brief, formulas, email, blueprint, book of business, product briefing, NYC pay — in one scrollable PDF, in case you'd rather read it on your phone than click around.

[↓ HK-CSM-Toolkit-FULL.pdf](#)

Submission checklist: export the finished deck to **one PDF (≤6 slides)** · attach your **.csv analysis** · make sure the **verbatim email** is on a slide · one **next action + named owner + date** · every **assumption labeled** · submit via the link inside **48 hours**.