

ENGLISH FOR WORK / ENGLISH FOR CUSTOMER PARTNERSHIPS

Customer Success English

Build adoption. Explain value. Keep trust.



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Eight practical lessons. Eleven extended conversations.

Vocabulary, phrase banks, guided speaking, and explained answers.

Revised 2026 edition / Upper-intermediate to advanced

Your route through the book

01 Onboarding and Implementation Expectations, page 4

Clarify owners, dependencies, and acceptance checks before confirming a customer launch date.

02 Adoption Metrics and Health Scores, page 16

Explain usage measures with the right population and distinguish access from meaningful adoption.

03 Support Escalations and Incident Communication, page 29

Communicate confirmed impact, temporary relief, unresolved questions, and the next update under pressure.

04 QBRs and Business Outcomes, page 40

Present measured change, disclose valuation assumptions, and separate released capacity from proven financial return.

05 Renewals and Churn Risk, page 54

Explore changed priorities, verify decision roles, and describe renewal risk without treating it as a verdict.

06 Expansion and Upsell Ethics, page 67

Explore additional demand, verify license rights, and align expansion with readiness and customer benefit.

07 Product Feedback and Feature Requests, page 82

Turn a proposed feature into a precise problem, usable evidence, and a responsible product-team handoff.

08 Difficult Customers and Boundary Setting, page 94

Acknowledge impact, reconcile disputed records, and set a respectful boundary while keeping support available.

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Suggested study range: B2-C1. This is an editorial study range, not a certified proficiency assessment.

Useful progress. Credible promises.

Customer success conversations connect the product to the work a customer needs to accomplish. These cases practice the language of shared ownership, meaningful use, measured outcomes, and honest follow-through when expectations or evidence are incomplete.

Agree the outcome before the activity

A completed training session or a high login count can be useful without proving that the customer has achieved the intended result. Name the workflow and the evidence that would demonstrate progress.

"Which completed task would show that the team can work independently?"

Give numbers a clear basis

State the period, population, unit, and source. Keep observed results separate from assumptions, and keep time released separate from cash savings.

"Thirty of eighty eligible users completed the workflow in the last thirty days."

Own the communication you can control

Acknowledge the impact, give the verified status, and name the next update. Do not fill an uncomfortable silence with an unsupported fix date or feature promise.

"I will update you at fourteen hundred UTC, even if the investigation is still open."

Keep the partnership two-sided

Confirm customer and supplier responsibilities without assigning blame. Ask permission to involve additional stakeholders, and set calm boundaries when frustration becomes personal.

"I want to resolve the issue with you; let us keep the discussion focused on the work."

Professional boundaries

All accounts, products, people, metrics, policies, dates, and incidents are fictional. This book teaches professional English, not technical, financial, legal, or security advice. Follow actual contracts, approved support guidance, data-handling rules, and authorized escalation procedures. Health-score definitions and renewal processes vary by organization.

A Read the situation

LESSON 01 / ONBOARDING AND IMPLEMENTATION EXPECTATIONS

Clarify owners, dependencies, and acceptance checks before confirming a customer launch date.

Turn a hoped-for launch into a shared readiness plan

Customer lead Omar expects a launch on Friday, 9 October. The export owner and training slot are still unassigned. Customer success manager Lena cannot confirm readiness. The agreed launch conditions are an approved customer export, a successful test import, user acceptance of the main workflow, and completed administrator training. The customer owns data preparation; the supplier owns import mapping and training delivery. No one has yet confirmed that the required people are available. A readiness review is scheduled for Thursday at 15:00 UTC.

People: Omar, Customer implementation lead; Lena, Customer success manager.

Read the record

Choose one answer per question using the facts above.

1. What is the status of the Friday launch?

- A. A target whose readiness conditions are not yet confirmed
- B. A completed acceptance milestone
- C. A confirmed date with all resources assigned
- D. A date canceled by the customer

2. Who owns preparation of the customer data?

- A. The customer
- B. The supplier training team
- C. Any end user who logs in
- D. The account executive automatically

3. When is the readiness review?

- A. Thursday at 15:00 UTC
- B. Friday after launch at 15:00 UTC
- C. Thursday at 15:00 in an unspecified local zone
- D. Whenever training happens to finish

[Answers and explanations, page 124](#)

B Vocabulary in use

CORE TERMS

onboarding

The process of preparing a customer to use a service effectively.

coordinate onboarding

kickoff

The initial meeting aligning purpose, people, and approach.

run a kickoff

target date

A desired date whose commitment status must be specified.

qualify the target date

dependency

A task or condition on which another step relies.

identify dependencies

data migration

Moving data between systems with appropriate checks.

coordinate data migration

data mapping

Specifying how source fields correspond to destination fields.

validate data mapping

implementation

Work to configure, connect, and introduce a solution.

plan the implementation

success plan

A shared record of outcomes, actions, ownership, and measures.

agree a success plan

go-live

The start of operational use under agreed conditions.

confirm go-live readiness

prerequisite

Something required before a particular activity can proceed.

verify prerequisites

source export

Data extracted from the originating system.

approve the source export

data owner

The role accountable for the relevant data and its use.

confirm the data owner

Say it in context

Stress the highlighted expression. Keep the surrounding words connected; pause at the end of the phrase.

onboarding ONBOARDING

coordinate onboarding

Keep the meaning precise: The process of preparing a customer to use a service effectively.

go-live GO-LIVE

confirm go-live readiness

Keep the meaning precise: The start of operational use under agreed conditions.

B Precision and professional shorthand

EXTEND YOUR RANGE

test import

A controlled trial of bringing data into the destination.

complete a test import

acceptance criterion

A defined condition used to judge whether work is acceptable.

agree acceptance criteria

training slot

A scheduled period with the required trainer and participants.

confirm the training slot

cutover

The coordinated transition into a new operational arrangement.

plan the cutover

hypercare

A defined period of enhanced support after introduction.

define hypercare coverage

RACI

Responsible, accountable, consulted, and informed; a role-assignment framework.

clarify the RACI

UAT

User acceptance testing; users checking the solution against agreed needs.

schedule UAT

administrator

A user with specified management permissions in the service.

train administrators

readiness review

A check of whether the conditions for the next stage are met.

hold a readiness review

rollback plan

An approved approach for reversing a change if required.

review the rollback plan

handover

Transfer of responsibility with the necessary information.

complete the handover

open dependency

A required preceding task or condition not yet satisfied.

track open dependencies

Say it in context

Stress the highlighted expression. Keep the surrounding words connected; pause at the end of the phrase.

data owner DATA OWNER

confirm the data owner

Keep the meaning precise: The role accountable for the relevant data and its use.

training slot TRAINING SLOT

confirm the training slot

Keep the meaning precise: A scheduled period with the required trainer and participants.

Phrases that move the work forward

Confirm the objective

Which workflow must the team be able to complete on launch day?

Name a dependency

The test import depends on an approved customer export.

Ask for an owner

Who can own the export and confirm its availability?

Define acceptance

We need users to complete the agreed workflow successfully.

Avoid assuming completion

A calendar invitation does not mean the training has happened.

State a conditional sequence

Once the approved export is available, we can assess the import schedule.

Check support

What support coverage is agreed for the initial operating period?

Agree a decision rule

Confirm launch only after the agreed conditions are met.

Qualify the date

Friday is the target, but readiness is not yet confirmed.

Separate responsibilities

Your team prepares the data; our team maps the agreed fields.

Check capacity

Has that person accepted the task and the timing?

Clarify attendance

Who will attend the administrator training?

Set a review

Let us review readiness on Thursday at fifteen hundred UTC.

Protect the data

Use the agreed secure transfer route and only the required fields.

Keep gaps visible

The export owner and training slot are still open.

Close with ownership

I will update the plan with each owner, dependency, and confirmed date.

Precision in real exchanges

Purpose: Separate responsibilities

Useful wording: Your team prepares the data; our team maps the agreed fields.

Purpose: Ask for an owner

Useful wording: Who can own the export and confirm its availability?

D Choose the response that fits

Choose one response for each situation. Preserve the facts, the decision boundary, and the purpose of the exchange.

1. Which launch statement is accurate?

- A.** Friday is confirmed because both teams want it.
- B.** The readiness meeting replaces the test import.
- C.** Administrator attendance is unnecessary once invitations are sent.
- D.** Friday remains a target pending the four agreed readiness conditions.

2. Which ownership statement matches the brief?

- A.** The supplier owns all customer source-data decisions.
- B.** Every end user is automatically the migration owner.
- C.** The trainer must approve the export simply because training is required.
- D.** Customer preparation and supplier mapping are separate responsibilities.

3. A colleague needs the term for this meaning: A shared record of outcomes, actions, ownership, and measures. Which term fits?

- A.** hypercare
- B.** data migration
- C.** acceptance criterion
- D.** success plan

D Choose the response that fits / continued

4. Rebuild the exchange from "Turn a hoped-for launch into a shared readiness plan". Omar: "That distinction helps. I can coordinate the export, but I need our data lead to confirm when an approved file will be available." Lena: [missing response] Omar: "Once the file is available, could the team start working immediately, or is there another check first?" Which response belongs in the gap?

- A.** Please name that person as the data owner in the plan and check their availability. We also need the agreed secure transfer route; please do not send the full customer database in an ordinary email.
- B.** Let us separate data preparation from our import work. Your team approves the source export; we map the agreed fields and run the import checks. We are not asking your team to perform those technical checks.
- C.** We need a successful test import before operational use. Then your users need to verify the main workflow against the agreed criteria. A file arriving is progress, but it does not complete those checks.
- D.** Friday is still our target date, but I cannot confirm readiness yet. The export owner and administrator training slot are open. I would like us to settle those responsibilities before you announce a firm launch.

[Answers and explanations, page 124](#)

One useful distinction

A target date is not evidence of readiness. The four stated conditions are export approval, a successful test import, workflow acceptance, and administrator training. The Thursday review checks those conditions; holding the meeting alone does not satisfy them.

E Conversation

Turn a hoped-for launch into a shared readiness plan

Turn a hoped-for launch into a shared readiness plan

Complete the numbered gaps. Use each bank entry once; some entries contain several words.

WORD AND PHRASE BANK

target date / user acceptance / success plan / training slot / handover / data preparation
/ readiness review / test import / data owner / open dependency

- 01 **Omar:** I have a launch announcement ready for next Friday. Before I send it, can you confirm we will be ready to use the system?
- 02 **Lena:** Friday is still our ¹ _____, but I cannot confirm readiness yet. The export owner and administrator training slot are open. I would like us to settle those responsibilities before you announce a firm launch.
- 03 **Omar:** I thought migration was part of your service. Which part are you asking us to own? My team cannot take over your technical import work.
- 04 **Lena:** Let us separate ² _____ from our import work. Your team approves the source export; we map the agreed fields and run the import checks. We are not asking your team to perform those technical checks.
- 05 **Omar:** That distinction helps. I can coordinate the export, but I need our data lead to confirm when an approved file will be available.
- 06 **Lena:** Please name that person as the ³ _____ in the plan and check their availability. We also need the agreed secure transfer route; please do not send the full customer database in an ordinary email.

E Conversation / continued

- 07 **Omar:** Once the file is available, could the team start working immediately, or is there another check first?
- 08 **Lena:** We need a successful ⁴ _____ before operational use. Then your users need to verify the main workflow against the agreed criteria. A file arriving is progress, but it does not complete those checks.
- 09 **Omar:** Two team leads could check the workflow. I will confirm their availability before putting their names in the plan.
- 10 **Lena:** Good. Their ⁵ _____ needs a clear basis: the agreed task, expected result, and any exceptions. We should know what successful completion means before deciding whether the system is ready.

Conversation continues on the next page.

Turn a hoped-for launch into a shared readiness plan

CONVERSATION / CONTINUED

- 11 **Omar:** The training invitation is not out yet. Our administrator works across two sites, so I need to check which session they can attend.
- 12 **Lena:** I will coordinate the ⁶ _____ with you. Sending an invitation is not the same as completing administrator training, which is one of our launch conditions.
- 13 **Omar:** I still need to tell the wider team something today. I do not want silence to create a different set of expectations.
- 14 **Lena:** Tell them Friday remains the target, with confirmation following the ⁷ _____ on Thursday at fifteen hundred UTC. That gives them a real decision point without implying that unresolved work is already finished.
- 15 **Omar:** What if the export is late but training is complete? Would we still describe the project as ready?
- 16 **Lena:** No. The export would remain an ⁸ _____. We must assess the effect on testing and acceptance rather than count one completed task as a substitute for another.
- 17 **Omar:** Please also make clear who supports the team after launch. They should not have to guess which contact to use.
- 18 **Lena:** We will confirm the ⁹ _____ and initial support arrangements. Coverage and contacts need to be explicit, with any enhanced support period defined rather than assumed to continue indefinitely.
- 19 **Omar:** I will confirm the data lead and user testers, check their availability, and send a conditional update to the team.
- 20 **Lena:** I will update the ¹⁰ _____ with the owners, dependencies, and actual status. At Thursday's review, we will decide from the evidence against all four conditions, not from the date alone.

CHECK THE GAPS

1. target date / 2. data preparation / 3. data owner / 4. test import / 5. user acceptance / 6. training slot / 7. readiness review / 8. open dependency / 9. handover / 10. success plan

[Why these answers fit, page 125](#)

F Check accuracy and scope

Turn a hoped-for launch into a shared readiness plan

Return to the case

Customer lead Omar expects a launch on Friday, 9 October. The export owner and training slot are still unassigned. Customer success manager Lena cannot confirm readiness. The agreed launch conditions are an approved customer export, a successful test import, user acceptance of the main workflow, and completed administrator training. The customer owns data preparation; the supplier owns import mapping and training delivery. No one has yet confirmed that the required people are available. A readiness review is scheduled for Thursday at 15:00 UTC.

Choose one answer per question. Use the case facts and keep any uncertainty or limits intact.

1. What does a training invitation establish?

- A. User acceptance of the main workflow
- B. Approval of every imported record
- C. A proposed or scheduled event, not completed training
- D. Successful administrator practice

2. What belongs in the Thursday decision?

- A. The actual status of each launch condition and any unresolved dependency
- B. A single completion percentage that averages the four conditions
- C. Training completion alone, because users can test after launch
- D. File receipt alone, with acceptance assumed from the customer sending it

[Answers and explanations, page 127](#)

Listen for the distinction

Check all ten gaps. Reread the four launch conditions and Thursday fifteen-hundred UTC review without substituting one completed task for another.

A shared plan needs explicit owners

Customers may interpret a friendly agreement with a target as a promise. State what is agreed, what is still unassigned, and which conditions govern launch. Confirm responsibility without making the customer feel that the supplier is transferring every difficulty to them.

F Say it / transfer to a new case

Confirm the conditions for another launch

A Monday launch remains a target. Customer lead Farah owns source-data approval. Supplier lead Ben owns import mapping. Training is complete, but the test import has failed. The readiness review is Friday at 10:00 UTC.

Complete the four gaps. With a partner, read alternate roles, then switch. Studying alone, read both roles and pause before each response.

WORD AND PHRASE BANK

test import / target / Farah / 10:00 UTC

- 01 **Customer:** Monday is still a ¹ _____.
- 02 **Supplier:** Source-data approval belongs to ² _____.
- 03 **Customer:** The incomplete technical condition is the ³ _____.
- 04 **Supplier:** The readiness review is Friday at ⁴ _____.

CHECK THE GAPS

1. target / 2. Farah / 3. test import / 4. 10:00 UTC

[Why these answers fit, page 127](#)

F Say it / transfer to a new case / continued

Rebuild the exchange

Choose the missing response. Read the completed three-turn exchange aloud, changing roles on the second reading.

1. Rebuild the exchange from "Turn a hoped-for launch into a shared readiness plan".
Omar: "I still need to tell the wider team something today. I do not want silence to create a different set of expectations." Lena: [missing response] Omar: "What if the export is late but training is complete? Would we still describe the project as ready?" Which response belongs in the gap?

- A.** Friday is still our target date, but I cannot confirm readiness yet. The export owner and administrator training slot are open. I would like us to settle those responsibilities before you announce a firm launch.
- B.** We need a successful test import before operational use. Then your users need to verify the main workflow against the agreed criteria. A file arriving is progress, but it does not complete those checks.
- C.** Tell them Friday remains the target, with confirmation following the readiness review on Thursday at fifteen hundred UTC. That gives them a real decision point without implying that unresolved work is already finished.
- D.** Please name that person as the data owner in the plan and check their availability. We also need the agreed secure transfer route; please do not send the full customer database in an ordinary email.

[Answers and explanations, page 128](#)

A Read the situation

LESSON 02 / ADOPTION METRICS AND HEALTH SCORES

Explain usage measures with the right population and distinguish access from meaningful adoption.

The green score hides a workflow gap

Account C14 has 120 licensed users. In the last 30 days, 100 distinct users logged in. Of the 80 users whose roles require the approval workflow, only 30 completed it at least once. The dashboard health score is green because its current rule emphasizes logins. Customer lead Mei reports that some staff still use email approvals. Customer success manager Daniel must explain the different denominators and investigate the workflow gap without assuming every inactive license is wasted or that the account will certainly cancel.

People: Mei, Customer operations lead; Daniel, Customer success manager.

Read the record

Choose one answer per question using the facts above.

1. How many licensed users logged in during the period?

- A. 100 of 120
- B. 30 of 120
- C. 80 of 100
- D. 30 of 30

2. Which population is relevant to workflow completion here?

- A. Only the 30 people who completed it
- B. The number of email messages sent
- C. The 80 users whose roles require that workflow
- D. All visitors to the supplier website

3. Why is the dashboard green?

- A. Every eligible user completed the workflow.
- B. The customer confirmed all intended outcomes.
- C. Renewal has already been signed.
- D. Its current rule emphasizes logins.

[Answers and explanations, page 129](#)

B Vocabulary in use

CORE TERMS

adoption

Use of a product or workflow in the intended working context.

assess adoption

active user

A user meeting a defined activity condition within a stated period.

define active users

eligible population

The people for whom a particular measure is relevant.

define the eligible population

login rate

The share of a defined population that logged in during a period.

calculate the login rate

breadth of adoption

How widely relevant use extends across users, teams, or functions.

assess adoption breadth

frequency

How often a defined action occurs within a period.

measure usage frequency

licensed user

A person covered by the relevant access entitlement.

count licensed users

unique user

A distinct person or identity counted once under the measurement rule.

count unique users

denominator

The base quantity used in a fraction or rate.

state the denominator

workflow completion

Finishing the defined sequence of work.

measure workflow completion

depth of adoption

How extensively intended capabilities are used.

assess adoption depth

cohort

A defined group followed or compared on a shared basis.

compare user cohorts

Say it in context

Stress the highlighted expression. Keep the surrounding words connected; pause at the end of the phrase.

adoption **ADOPTION**

assess adoption

Keep the meaning precise: Use of a product or workflow in the intended working context.

denominator **DENOMINATOR**

state the denominator

Keep the meaning precise: The base quantity used in a fraction or rate.

B Precision and professional shorthand

EXTEND YOUR RANGE

health score

A configured indicator combining selected account signals.

interpret the health score

leading indicator

A measure used as a possible signal of a later result.

test leading indicators

engagement

Participation or interaction under a stated definition.

assess stakeholder engagement

usage telemetry

Recorded data about product interactions.

validate usage telemetry

event definition

The rule specifying what a recorded action represents.

verify event definitions

adoption barrier

A condition making intended use difficult or impractical.

identify adoption barriers

weighting

The relative influence assigned to a component in a calculation.

review score weighting

lagging indicator

A measure of an outcome that has already occurred.

distinguish lagging indicators

sentiment

Expressed attitudes or feelings about the relationship or service.

record customer sentiment

instrumentation

The setup used to capture events and measurements.

check instrumentation

usage gap

A difference between intended and observed use.

investigate the usage gap

vanity metric

A flattering measure with weak relevance to the decision at hand.

question a vanity metric

Say it in context

Stress the highlighted expression. Keep the surrounding words connected; pause at the end of the phrase.

cohort **COHORT**

compare user cohorts

Keep the meaning precise: A defined group followed or compared on a shared basis.

engagement **ENGAGEMENT**

assess stakeholder engagement

Keep the meaning precise: Participation or interaction under a stated definition.

Phrases that move the work forward

Acknowledge the signal

The login count shows broad access during this period.

Specify the period

These figures cover the last thirty days.

State the rate

Thirty of eighty eligible users completed it, which is thirty-seven point five percent.

Check the event

What exactly triggers a workflow-completed event?

Ask about the obstacle

Where do people switch back to email?

Check role fit

Some licensed users may not need this workflow.

Test relevance

Does this measure connect to the outcome you bought the product for?

Measure again

Use the same population and period definition for the follow-up.

Name the gap

It does not show that the approval workflow is being used.

Specify the population

Eighty users have roles that require this workflow.

Distinguish another rate

Thirty out of all one hundred twenty licenses would answer a different question.

Avoid double counting

Count distinct users, not every repeated login.

Keep the cause open

Low completion does not tell us the reason by itself.

Challenge the score carefully

Green reflects the current scoring rule, not every aspect of account health.

Agree a targeted intervention

Let us address the confirmed obstacle before scheduling generic retraining.

Close with evidence

Record the gap, the confirmed barrier, and the next measurement date.

Precision in real exchanges

Purpose: Specify the population

Useful wording: Eighty users have roles that require this workflow.

Purpose: State the rate

Useful wording: Thirty of eighty eligible users completed it, which is thirty-seven point five percent.

D Choose the response that fits

Choose one response for each situation. Preserve the facts, the decision boundary, and the purpose of the exchange.

1. Which statement correctly describes workflow use?

- A.** Every license without a completed approval is unused.
- B.** Thirty completions prove a stable daily habit.
- C.** Thirty of eighty eligible users completed it at least once in thirty days.
- D.** Eighty-three percent completed it because they logged in.

2. What is the workflow completion percentage?

- A.** 83.3%
- B.** 62.5%
- C.** 37.5%
- D.** 25%

3. A colleague needs the term for this meaning: A distinct person or identity counted once under the measurement rule. Which term fits?

- A.** leading indicator
- B.** event definition
- C.** breadth of adoption
- D.** unique user

D Choose the response that fits / continued

4. Rebuild the exchange from "The green score hides a workflow gap". Mei: "Only eighty people have roles that require approvals. The other forty use different parts of the product." Daniel: [missing response] Mei: "Our meeting slide used thirty out of one hundred twenty and said twenty-five percent. Is that wrong, or are we measuring something different?" Which response belongs in the gap?

- A.** Then eighty is the relevant denominator for this workflow measure. Thirty of those eighty completed it at least once, which is thirty-seven point five percent.
- B.** That gives us a defined cohort. We will record membership changes and keep the completion definition consistent, so a rise does not merely reflect a different population.
- C.** The green health score mainly reflects logins at the moment. It tells us something about access, but it does not establish that the approval workflow is replacing email.
- D.** Exactly. Frequency and task context matter alongside the number of users. We should not turn at least once into a claim of regular, independent use.

[Answers and explanations, page 129](#)

One useful distinction

Login activity is 100 divided by 120, approximately 83.3%. Relevant workflow completion is 30 divided by 80, or 37.5%. Thirty divided by 120 is 25%, but that answers a different question about all licensed users.

E Conversation

The green score hides a workflow gap

The green score hides a workflow gap

Complete the numbered gaps. Use each bank entry once; some entries contain several words.

WORD AND PHRASE BANK

weighting / health score / denominator / adoption barrier / event definition /
eligible population / Frequency / cohort / login rate / usage gap

- 01 **Mei:** The dashboard is green, but my supervisors are still chasing approvals by email. What is that green score actually telling us?
- 02 **Daniel:** The green ¹ _____ mainly reflects logins at the moment. It tells us something about access, but it does not establish that the approval workflow is replacing email.
- 03 **Mei:** One hundred people logged in. That sounds encouraging, but I do not know how it relates to the work we actually need.
- 04 **Daniel:** It is one hundred distinct users out of one hundred twenty licenses in thirty days. The ² _____ is about eighty-three point three percent. Repeated visits by the same person do not increase that user count.
- 05 **Mei:** Only eighty people have roles that require approvals. The other forty use different parts of the product.
- 06 **Daniel:** Then eighty is the relevant ³ _____ for this workflow measure. Thirty of those eighty completed it at least once, which is thirty-seven point five percent.

E Conversation / continued

- 07 **Mei:** Our meeting slide used thirty out of one hundred twenty and said twenty-five percent. Is that wrong, or are we measuring something different?
- 08 **Daniel:** The arithmetic is correct, but the ⁴ _____ for approvals is eighty. Twenty-five percent describes completers as a share of all licenses; thirty-seven point five percent describes completion among those expected to use this workflow.
- 09 **Mei:** Before we act on thirty, I want to know what the system calls a completed approval. Could starting a request count?
- 10 **Daniel:** We should verify the ⁵ _____. A started request and a completed workflow are different events. We need to confirm that the recorded signal matches the action we are discussing.

Conversation continues on the next page.

The green score hides a workflow gap

CONVERSATION / CONTINUED

- 11 **Mei:** The supervisors say people return to email when they cannot identify the next approver. I do not yet know whether that is configuration or training.
- 12 **Daniel:** That is a useful ⁶ _____ to investigate. Let us look at the affected roles and steps before prescribing another general training session or assuming people simply dislike change.
- 13 **Mei:** Could the score include this workflow information? It is more relevant to our purchase than how often someone opens the homepage.
- 14 **Daniel:** We can review the ⁷ _____ and the signals with our team. The purpose is a more useful account picture, not a different color chosen to justify a conclusion we already want.
- 15 **Mei:** I also want to distinguish someone who tried it once from a team that relies on it throughout the month.
- 16 **Daniel:** Exactly. ⁸ _____ and task context matter alongside the number of users. We should not turn at least once into a claim of regular, independent use.
- 17 **Mei:** Let us begin with the supervisor group that reported the approver problem, then compare the same group after it is addressed.
- 18 **Daniel:** That gives us a defined ⁹ _____. We will record membership changes and keep the completion definition consistent, so a rise does not merely reflect a different population.
- 19 **Mei:** Please keep the renewal discussion separate for now. I am describing a workflow problem, not announcing that we intend to leave.
- 20 **Daniel:** Agreed. The ¹⁰ _____ deserves action, but it does not prove cancellation. We will validate the measure, investigate the approver obstacle, and agree what improvement we should check next.

CHECK THE GAPS

1. health score / 2. login rate / 3. denominator / 4. eligible population / 5. event definition / 6. adoption barrier / 7. weighting / 8. Frequency / 9. cohort / 10. usage gap

[Why these answers fit, page 130](#)

F Check accuracy and scope

The green score hides a workflow gap

Return to the case

Account C14 has 120 licensed users. In the last 30 days, 100 distinct users logged in. Of the 80 users whose roles require the approval workflow, only 30 completed it at least once. The dashboard health score is green because its current rule emphasizes logins. Customer lead Mei reports that some staff still use email approvals. Customer success manager Daniel must explain the different denominators and investigate the workflow gap without assuming every inactive license is wasted or that the account will certainly cancel.

Choose one answer per question. Use the case facts and keep any uncertainty or limits intact.

1. What should happen before blaming resistance?

- A. Verify event definitions and ask where the workflow breaks down.
- B. Schedule the same generic training for everyone before checking the obstacle.
- C. Raise the login weighting because its data is easiest to collect.
- D. Ask only the thirty completers whether the workflow works for them.

2. Which follow-up comparison is sound?

- A. Compare this month's unique users with next month's raw event count.
- B. Change the denominator silently to make the rate rise.
- C. Treat one extra login as proof of realized business value.
- D. Compare the same defined eligible group and period, noting any population changes.

[Answers and explanations, page 132](#)

Listen for the distinction

Correct all ten gaps. Reread the 100/120 login rate, 30/80 workflow rate, and 30/120 all-license comparison.

Challenge the measure without dismissing the team

A green dashboard can feel reassuring to one team and disconnected from daily work to another. Acknowledge what the measure genuinely shows, then examine the missing outcome. Ask about role, frequency, access, and obstacles before calling users resistant.

F Say it / transfer to a new case

Use the correct adoption denominator

In one month, 45 of 60 licensed users log in. Only 40 users need the scheduling workflow; 20 of those complete it. A dashboard based on logins does not establish scheduling adoption.

Complete the four gaps. With a partner, read alternate roles, then switch. Studying alone, read both roles and pause before each response.

WORD AND PHRASE BANK

75% / 50% / workflow completion / 40

- 01 **Customer:** The login rate is ¹ _____.
- 02 **Manager:** The eligible scheduling population is ² _____.
- 03 **Customer:** The eligible completion rate is ³ _____.
- 04 **Manager:** A login is not necessarily a ⁴ _____.

CHECK THE GAPS

1. 75% / 2. 40 / 3. 50% / 4. workflow completion

[Why these answers fit, page 132](#)

Rebuild the exchange

Choose the missing response. Read the completed three-turn exchange aloud, changing roles on the second reading.

1. Rebuild the exchange from "The green score hides a workflow gap". Mei: "Could the score include this workflow information? It is more relevant to our purchase than how often someone opens the homepage." Daniel: [missing response] Mei: "I also want to distinguish someone who tried it once from a team that relies on it throughout the month." Which response belongs in the gap?

- A.** We can review the weighting and the signals with our team. The purpose is a more useful account picture, not a different color chosen to justify a conclusion we already want.
- B.** That is a useful adoption barrier to investigate. Let us look at the affected roles and steps before prescribing another general training session or assuming people simply dislike change.
- C.** Agreed. The usage gap deserves action, but it does not prove cancellation. We will validate the measure, investigate the approver obstacle, and agree what improvement we should check next.
- D.** We should verify the event definition. A started request and a completed workflow are different events. We need to confirm that the recorded signal matches the action we are discussing.

[Answers and explanations, page 133](#)

Review 1 / Meaning and context

Use language from the lessons you have completed. Choose one answer per question.

Case file

Revisit "Onboarding and Implementation Expectations" and "Adoption Metrics and Health Scores". Choose precise terminology, then reconstruct the missing responses using both neighboring turns. The final two questions also revisit earlier conversations.

1. A colleague needs the term for this meaning: The initial meeting aligning purpose, people, and approach. Which term fits?

- A. kickoff
- B. UAT
- C. rollback plan
- D. prerequisite

2. A colleague needs the term for this meaning: Finishing the defined sequence of work. Which term fits?

- A. usage telemetry
- B. health score
- C. adoption
- D. workflow completion

3. Rebuild the exchange from "Turn a hoped-for launch into a shared readiness plan". Omar: "Two team leads could check the workflow. I will confirm their availability before putting their names in the plan." Lena: [missing response] Omar: "The training invitation is not out yet. Our administrator works across two sites, so I need to check which session they can attend." Which response belongs in the gap?

- A. We will confirm the handover and initial support arrangements. Coverage and contacts need to be explicit, with any enhanced support period defined rather than assumed to continue indefinitely.
- B. I will update the success plan with the owners, dependencies, and actual status. At Thursday's review, we will decide from the evidence against all four conditions, not from the date alone.
- C. Good. Their user acceptance needs a clear basis: the agreed task, expected result, and any exceptions. We should know what successful completion means before deciding whether the system is ready.
- D. No. The export would remain an open dependency. We must assess the effect on testing and acceptance rather than count one completed task as a substitute for another.

Review 1 / Meaning and context / continued

4. Rebuild the exchange from "The green score hides a workflow gap". Mei: "Let us begin with the supervisor group that reported the approver problem, then compare the same group after it is addressed." Daniel: [missing response] Mei: "Please keep the renewal discussion separate for now. I am describing a workflow problem, not announcing that we intend to leave." Which response belongs in the gap?

- A.** Then eighty is the relevant denominator for this workflow measure. Thirty of those eighty completed it at least once, which is thirty-seven point five percent.
- B.** That gives us a defined cohort. We will record membership changes and keep the completion definition consistent, so a rise does not merely reflect a different population.
- C.** The green health score mainly reflects logins at the moment. It tells us something about access, but it does not establish that the approval workflow is replacing email.
- D.** That is a useful adoption barrier to investigate. Let us look at the affected roles and steps before prescribing another general training session or assuming people simply dislike change.

[Answers and explanations, page 164](#)

A Read the situation

LESSON 03 / SUPPORT ESCALATIONS AND INCIDENT COMMUNICATION

Communicate confirmed impact, temporary relief, unresolved questions, and the next update under pressure.

Offer the verified workaround without inventing a fix date

Incident I42 prevents scheduled report exports for eight confirmed customer accounts in the EU region. Support has verified an administrator-only manual download workaround for those accounts. It does not restore automated scheduling. Engineering is investigating; neither a permanent-fix date nor the cause is confirmed. An unsent customer message says the issue will be fixed tomorrow. Customer success manager Asha and support lead Leon must correct it. The next customer update is due at 14:00 UTC, even if the investigation has no new result.

People: Asha, Customer success manager; Leon, Support lead.

Read the record

Choose one answer per question using the facts above.

1. What is the confirmed impact?

- A. Every EU account has lost its stored data.
- B. Only administrator logins fail.
- C. Scheduled exports fail for eight confirmed EU-region accounts.
- D. All products are unavailable worldwide.

2. What does the workaround provide?

- A. Proof that the incident is closed
- B. Administrator manual downloads, without restored scheduling
- C. A permanent correction of the underlying cause
- D. Automated exports for every account globally

3. What is confirmed about timing?

- A. No message is needed without a new result.
- B. The next update is at 14:00 UTC.
- C. The permanent fix arrives tomorrow.
- D. The root cause will be known by 14:00 UTC.

[Answers and explanations, page 134](#)

B Vocabulary in use

CORE TERMS

incident

An event disrupting or degrading a service under the relevant process.

coordinate an incident

affected account

A customer account known to experience the issue.

identify affected accounts

workaround

A temporary way to reduce impact without fully correcting the underlying issue.

provide a verified workaround

reproduction

Recreating reported behavior under specified conditions.

reproduce the issue

escalation

Routing an issue to a role with appropriate expertise or authority.

escalate the case

priority

The order or urgency assigned to work.

confirm the response priority

confirmed impact

The effect established by available evidence.

state confirmed impact

scheduled export

Data output arranged to run automatically at specified times.

restore scheduled exports

permanent fix

A correction intended to resolve the underlying defect or cause.

validate a permanent fix

support case

A tracked customer request or problem report.

link the support case

severity

A classification of impact under an organization's incident rules.

assess incident severity

incident owner

The person accountable for coordinating the incident response.

identify the incident owner

Say it in context

Stress the highlighted expression. Keep the surrounding words connected; pause at the end of the phrase.

incident INCIDENT

coordinate an incident

Keep the meaning precise: An event disrupting or degrading a service under the relevant process.

permanent fix PERMANENT FIX

validate a permanent fix

Keep the meaning precise: A correction intended to resolve the underlying defect or cause.

B Precision and professional shorthand

EXTEND YOUR RANGE

root cause

The underlying cause established through investigation.

verify the root cause

restoration

Return of a service or capability to the defined working state.

confirm service restoration

update cadence

The agreed frequency of status communication.

maintain the update cadence

UTC

Coordinated Universal Time, a shared time reference.

specify the time in UTC

scope of impact

The services, users, or accounts affected.

verify the scope of impact

post-incident review

A later assessment of events, response, and improvements.

schedule a post-incident review

mitigation

An action reducing impact or risk.

apply an approved mitigation

status update

A communication of current facts and next actions.

issue a status update

ETA

Estimated time of arrival; also used informally for expected completion of a specified task.

qualify an ETA

known limitation

A confirmed boundary on capability or effectiveness.

disclose known limitations

customer impact

The effect on a customer's work or operations.

describe customer impact

resolution criterion

A condition used to determine whether the incident can be closed.

confirm resolution criteria

Say it in context

Stress the highlighted expression. Keep the surrounding words connected; pause at the end of the phrase.

incident owner INCIDENT OWNER

identify the incident owner

Keep the meaning precise: The person accountable for coordinating the incident response.

update cadence UPDATE CADENCE

maintain the update cadence

Keep the meaning precise: The agreed frequency of status communication.

Phrases that move the work forward

Acknowledge the impact

I understand that the missing reports are interrupting your daily review.

Keep the scope qualified

We are still checking whether other accounts are affected.

State the limitation

That route does not restore automated scheduling.

Correct the promise

We do not have a confirmed permanent-fix date.

Maintain contact

We will update you then even if the investigation is still open.

Coordinate the message

Link the customer case to incident I42 so updates stay consistent.

Avoid unsafe reassurance

I cannot make a data-loss or security claim without verified information.

Define closure

Confirm restoration against the incident team's agreed criteria.

State the known scope

We have confirmed scheduled-export failures in eight EU-region accounts.

Explain the workaround

Administrators can use the verified manual download route.

Protect the instructions

Use the approved steps for the affected account configuration.

Separate two events

Fourteen hundred UTC is the next update time, not a fix deadline.

Avoid inventing a cause

The cause has not yet been confirmed.

Check the customer need

Which scheduled report is blocking your immediate work?

Escalate new evidence

Send the new account details through the approved support route.

Close with a clear status

A workaround is available; investigation continues; the next update is at fourteen hundred UTC.

Precision in real exchanges

Purpose: Explain the workaround

Useful wording: Administrators can use the verified manual download route.

Purpose: State the limitation

Useful wording: That route does not restore automated scheduling.

D Choose the response that fits

Choose one response for each situation. Preserve the facts, the decision boundary, and the purpose of the exchange.

1. Which corrected message is accurate?

- A.** Eight reports mean only eight people are affected.
- B.** A verified administrator workaround is available; the fix date remains unconfirmed.
- C.** All exports will be permanently repaired tomorrow.
- D.** A manual download proves automatic scheduling is restored.

2. What should happen at 14:00 UTC if nothing has changed?

- A.** Replace the unknown date with tomorrow.
- B.** Send the promised update and state that the investigation continues.
- C.** Wait silently until engineering has a final answer.
- D.** Announce closure because the update deadline has arrived.

3. A colleague needs the term for this meaning: Data output arranged to run automatically at specified times. Which term fits?

- A.** escalation
- B.** scope of impact
- C.** restoration
- D.** scheduled export

D Choose the response that fits / continued

4. Rebuild the exchange from "Offer the verified workaround without inventing a fix date". Asha: "I will avoid saying exports are fully restored. Do we know how many accounts are affected?" Leon: [missing response] Asha: "One contact has asked whether the underlying report data has disappeared. I do not see an approved statement about that." Which response belongs in the gap?

- A.** No. The permanent fix is still under investigation. Please remove tomorrow. We can give the verified workaround and the next update time, but we should not manufacture a completion estimate.
- B.** The confirmed impact is scheduled-export failure in eight accounts in the EU region. That is what we have verified so far, not proof that no additional accounts will report the issue.
- C.** Yes. Record the customer impact and send it through the response process. The team can assess urgency using the actual facts; a forceful message alone does not define the technical severity.
- D.** The approved workaround lets administrators download the reports manually for the affected configuration. It does not restore scheduled delivery, so we need to explain the manual effort and access requirement.

[Answers and explanations, page 134](#)

One useful distinction

Eight confirmed accounts is the known scope, not proof that no others are affected. The manual route provides limited relief to administrators. It does not restore scheduling, establish the root cause, or justify saying the incident has been permanently resolved.

E Conversation

Offer the verified workaround without inventing a fix date

Offer the verified workaround without inventing a fix date

Complete the numbered gaps. Use each bank entry once; some entries contain several words.

WORD AND PHRASE BANK

permanent fix / customer impact / status update / scope of impact / workaround / resolution criteria / ETA / support case / update cadence / confirmed impact

- 01 **Asha:** I am about to send the customer update, but it says fixed tomorrow. Where did that date come from? Has engineering actually confirmed it?
- 02 **Leon:** No. The ¹ _____ is still under investigation. Please remove tomorrow. We can give the verified workaround and the next update time, but we should not manufacture a completion estimate.
- 03 **Asha:** The customer is missing its morning reports and wants something useful now. What exactly can we offer?
- 04 **Leon:** The approved ² _____ lets administrators download the reports manually for the affected configuration. It does not restore scheduled delivery, so we need to explain the manual effort and access requirement.
- 05 **Asha:** I will avoid saying exports are fully restored. Do we know how many accounts are affected?
- 06 **Leon:** The ³ _____ is scheduled-export failure in eight accounts in the EU region. That is what we have verified so far, not proof that no additional accounts will report the issue.

E Conversation / continued

- 07 **Asha:** One contact has asked whether the underlying report data has disappeared. I do not see an approved statement about that.
- 08 **Leon:** Do not add one without verification. The ⁴ _____ needs evidence for each claim. We should route the question to the incident team instead of inferring data loss, or its absence, from an export symptom.
- 09 **Asha:** Our account contact has two different messages: one from the ticket and one from the incident update. How do we get them back to a consistent status?
- 10 **Leon:** Link the ⁵ _____ to I42 and use the approved incident status. Preserve their specific business impact, but do not create a separate fix date in the account notes.

Conversation continues on the next page.

Offer the verified workaround without inventing a fix date

CONVERSATION / CONTINUED

- 11 **Asha:** Their finance lead needs a report before an afternoon meeting. Can I ask which report is most urgent without changing the incident severity myself?
- 12 **Leon:** Yes. Record the ⁶ _____ and send it through the response process. The team can assess urgency using the actual facts; a forceful message alone does not define the technical severity.
- 13 **Asha:** We promised another message at fourteen hundred UTC. If engineering has no new finding, should I wait until there is more to say?
- 14 **Leon:** Keep the ⁷ _____. At fourteen hundred UTC, state that investigation continues, confirm any unchanged workaround, and give the next communication point agreed by the response team.
- 15 **Asha:** I want to be clear that fourteen hundred refers to communication. Otherwise the customer may hear it as another completion time.
- 16 **Leon:** Exactly. It is not an ⁸ _____ for a fix. Use the words next update and name UTC, rather than saying we will have it for you by two.
- 17 **Asha:** If someone can download the report manually, should support close the incident or leave it open?
- 18 **Leon:** Follow the agreed ⁹ _____. Temporary relief does not by itself show that scheduling is restored. The incident team needs the defined verification before declaring the affected capability resolved.
- 19 **Asha:** Then my message will acknowledge the disruption, give the approved manual option, explain its limit, and keep the fix date unconfirmed.
- 20 **Leon:** Good. Check that the ¹⁰ _____ matches those facts and says when we will contact them again. That is a useful commitment we can keep while the technical investigation continues.

CHECK THE GAPS

1. permanent fix / 2. workaround / 3. confirmed impact / 4. scope of impact / 5. support case / 6. customer impact / 7. update cadence / 8. ETA / 9. resolution criteria / 10. status update

[Why these answers fit, page 135](#)

F Check accuracy and scope

Offer the verified workaround without inventing a fix date

Return to the case

Incident I42 prevents scheduled report exports for eight confirmed customer accounts in the EU region. Support has verified an administrator-only manual download workaround for those accounts. It does not restore automated scheduling. Engineering is investigating; neither a permanent-fix date nor the cause is confirmed. An unsent customer message says the issue will be fixed tomorrow. Customer success manager Asha and support lead Leon must correct it. The next customer update is due at 14:00 UTC, even if the investigation has no new result.

Choose one answer per question. Use the case facts and keep any uncertainty or limits intact.

1. Which scope statement avoids overclaiming?

- A. The entire service has permanently failed.
- B. Eight accounts are confirmed affected; wider impact is still being checked.
- C. Exactly eight accounts worldwide can possibly be affected.
- D. Every EU account is confirmed affected.

2. Which statement requires additional verified evidence?

- A. No data was lost and no security issue occurred.
- B. The next update is at 14:00 UTC.
- C. Manual download does not restore scheduling.
- D. The permanent-fix date is unconfirmed.

[Answers and explanations, page 137](#)

Listen for the distinction

Check the ten gaps. Reread the eight-account scope, manual-download limitation, and unresolved data questions.

Certainty is not the only form of reassurance

A customer under pressure needs a usable status, not a confident guess. Acknowledge the disruption and give a specific next contact. Explain unfamiliar technical terms in ordinary language, while keeping the approved workaround and its limits intact.

F Say it / transfer to a new case

Correct another premature fix promise

Incident J18 affects automated invoice downloads for five confirmed accounts. An approved manual route is available to administrators. The fix date is unknown. The next update is 11:30 UTC.

Complete the four gaps. With a partner, read alternate roles, then switch. Studying alone, read both roles and pause before each response.

WORD AND PHRASE BANK

11:30 UTC / unknown / five / administrator access

- 01 **Manager:** The known affected-account count is ¹ _____.
- 02 **Customer:** The temporary route requires ² _____.
- 03 **Manager:** The permanent-fix date remains ³ _____.
- 04 **Customer:** The next update is at ⁴ _____.

CHECK THE GAPS

1. five / 2. administrator access / 3. unknown / 4. 11:30 UTC

[Why these answers fit, page 137](#)

Rebuild the exchange

Choose the missing response. Read the completed three-turn exchange aloud, changing roles on the second reading.

1. Rebuild the exchange from "Offer the verified workaround without inventing a fix date". Asha: "We promised another message at fourteen hundred UTC. If engineering has no new finding, should I wait until there is more to say?" Leon: [missing response] Asha: "I want to be clear that fourteen hundred refers to communication. Otherwise the customer may hear it as another completion time." Which response belongs in the gap?

- A.** Link the support case to I42 and use the approved incident status. Preserve their specific business impact, but do not create a separate fix date in the account notes.
- B.** Follow the agreed resolution criteria. Temporary relief does not by itself show that scheduling is restored. The incident team needs the defined verification before declaring the affected capability resolved.
- C.** Exactly. It is not an ETA for a fix. Use the words next update and name UTC, rather than saying we will have it for you by two.
- D.** Keep the update cadence. At fourteen hundred UTC, state that investigation continues, confirm any unchanged workaround, and give the next communication point agreed by the response team.

[Answers and explanations, page 138](#)

A Read the situation

LESSON 04 / QBRs AND BUSINESS OUTCOMES

Present measured change, disclose valuation assumptions, and separate released capacity from proven financial return.

Replace the impressive ROI claim with a defensible value story

For a quarterly business review, Kira prepares a slide claiming proven savings and return on investment. Customer finance lead Joel confirms logs showing 40 staff hours for one reporting cycle before implementation and 28 for one cycle afterward. Other process changes occurred too. Kira values the 12-hour difference at an unvalidated \$40 per hour and annualizes it over 12 months. The annual subscription costs \$3,600; implementation and training costs are not fully recorded. Staffing expenditure has not changed. The slide must distinguish observations, assumptions, attribution, and missing costs.

People: Kira, Customer success manager; Joel, Customer finance lead.

Read the record

Choose one answer per question using the facts above.

1. What change do the time logs show?

- A. A \$5,760 reduction in cash expenditure
- B. Proof that the product alone caused all improvement
- C. A 12-hour difference between the two recorded cycles
- D. A verified 12-hour monthly saving for every future month

2. Which input has not been validated?

- A. The \$40 hourly valuation
- B. The logged 40-hour earlier cycle
- C. The logged 28-hour later cycle
- D. The \$3,600 annual subscription price

3. Why is a proven full ROI claim unsupported?

- A. Time differences can never be useful.
- B. Subscription cost is always the only relevant cost.
- C. The customer has confirmed that all benefits are cash savings.
- D. Attribution and recurring benefits are unverified, and relevant costs are incomplete.

[Answers and explanations, page 139](#)

B Vocabulary in use

CORE TERMS

QBR

Quarterly business review; a periodic discussion of outcomes, priorities, and progress.

prepare a QBR

baseline

The defined starting measure for a comparison.

establish a baseline

observed change

A measured difference, without automatically establishing its cause.

report observed change

time saving

A reduction in time required under a stated comparison.

validate time savings

cash saving

A reduction in actual expenditure under a defined comparison.

verify cash savings

annualization

Extending a shorter-period amount to an annual estimate using assumptions.

disclose annualization assumptions

business outcome

A result relevant to the customer's goals or operations.

validate business outcomes

comparison period

The time window used as the counterpart in an analysis.

align comparison periods

attribution

Assigning an effect to a cause or contributor.

qualify attribution

released capacity

Staff time made available for other work.

describe released capacity

hourly valuation

The monetary value assigned to an hour for an analysis.

validate the hourly valuation

benefit estimate

A calculated or proposed value not necessarily realized.

qualify the benefit estimate

Say it in context

Stress the highlighted expression. Keep the surrounding words connected; pause at the end of the phrase.

QBR QBR

prepare a QBR

Keep the meaning precise: Quarterly business review; a periodic discussion of outcomes, priorities, and progress.

attribution ATTRIBUTION

qualify attribution

Keep the meaning precise: Assigning an effect to a cause or contributor.

B Precision and professional shorthand

EXTEND YOUR RANGE

ROI

Return on investment; net benefit relative to investment cost on a stated basis.

substantiate ROI

cost base

The costs included in a comparison or calculation.

define the cost base

training cost

The resources or expenditure associated with preparing users.

include training costs

validation

Checking a claim or measure against appropriate evidence.

obtain customer validation

confounding factor

Another influence that complicates attribution of an observed change.

identify confounding factors

outcome owner

The person responsible for confirming and tracking the relevant result.

name the outcome owner

net benefit

Benefits minus included costs under a defined calculation.

calculate net benefit

implementation cost

Expenditure or resources used to introduce the solution.

capture implementation costs

subscription cost

The recurring access charge under the relevant agreement.

confirm subscription costs

value realization

Actual achievement of an intended customer benefit.

track value realization

sensitivity analysis

Examining how results change when assumptions vary.

test assumption sensitivity

value narrative

An explanation connecting evidence to a customer-relevant benefit.

build a credible value narrative

Say it in context

Stress the highlighted expression. Keep the surrounding words connected; pause at the end of the phrase.

benefit estimate BENEFIT ESTIMATE

qualify the benefit estimate

Keep the meaning precise: A calculated or proposed value not necessarily realized.

training cost TRAINING COST

include training costs

Keep the meaning precise: The resources or expenditure associated with preparing users.

Phrases that move the work forward

Acknowledge the correction

You are right to distinguish the time logs from a proven financial return.

Calculate the difference

That is twelve fewer hours in the compared cycles.

Identify another influence

Other process changes occurred during the same period.

State the conditional figure

At that rate, twelve hours would be valued at four hundred eighty dollars.

Distinguish capacity

The time difference may release capacity without reducing cash expenditure.

Withdraw the overclaim

We should not call this proven ROI.

Ask for ownership

Who can validate the time measure and the monetary basis?

Separate evidence and assumption

Let us label each input before discussing the result.

State the observation

The recorded cycle fell from forty staff hours to twenty-eight.

Limit the inference

The comparison does not isolate the product's contribution.

Label the valuation

Forty dollars per hour is an assumption that needs your validation.

Qualify annualization

The annual estimate assumes the same benefit in twelve monthly cycles.

Expose missing costs

Implementation and training costs are not fully recorded.

Keep the useful result

The operational change is still worth reporting accurately.

Agree the next evidence

Compare further cycles using a consistent task definition.

Close the review

We will report the observed change and a plan to validate value over time.

Precision in real exchanges

Purpose: Limit the inference

Useful wording: The comparison does not isolate the product's contribution.

Purpose: Identify another influence

Useful wording: Other process changes occurred during the same period.

D Choose the response that fits

Choose one response for each situation. Preserve the facts, the decision boundary, and the purpose of the exchange.

1. What follows from the stated hourly assumption?

- A.** The product alone caused every hour of improvement.
- B.** The annual subscription is \$480.
- C.** Twelve hours at \$40 would be valued at \$480 per cycle.
- D.** The customer has already saved \$480 in cash.

2. What is required to describe \$5,760 responsibly?

- A.** State the assumptions of twelve similar monthly cycles and the unvalidated hourly value.
- B.** Label it audited annual cash savings.
- C.** Treat it as a guaranteed renewal credit.
- D.** Omit the period because the number is positive.

3. A colleague needs the term for this meaning: The time window used as the counterpart in an analysis. Which term fits?

- A.** cash saving
- B.** confounding factor
- C.** cost base
- D.** comparison period

D Choose the response that fits / continued

4. Rebuild the exchange from "Replace the impressive ROI claim with a defensible value story". Joel: "The twelve-hour difference is correct. Where did the forty-dollar hourly number come from?" Kira: [missing response] Joel: "And the five-thousand-seven-hundred-sixty-dollar annual figure assumes that the same thing happens every month?" Which response belongs in the gap?

- A.** Then released capacity is the relevant distinction. Staff may use the time for other work. Calling it a cash saving would imply a spending reduction that you have not reported.
- B.** I will describe value realization only where we have evidence. The revised slide will show the observed twelve-hour difference, label the assumptions, identify missing costs, and state the next validation steps.
- C.** You are right. The observed change is from forty staff hours to twenty-eight for the two recorded cycles. I have moved too quickly from that difference to a broader claim about return.
- D.** It is an unvalidated hourly valuation in my calculation. At that rate, twelve hours would be worth four hundred eighty dollars for a cycle, but I should not present your approval as already given.

[Answers and explanations, page 139](#)

One useful distinction

The observed difference is 40 minus 28, or 12 hours. At the assumed \$40 per hour, that equals \$480 for a cycle. Multiplying by 12 gives \$5,760 only if the monthly frequency, repeated difference, and valuation assumptions hold.

E Conversation

Replace the impressive ROI claim with a defensible value story

Replace the impressive ROI claim with a defensible value story

Complete the numbered gaps. Use each bank entry once; some entries contain several words.

WORD AND PHRASE BANK

annualization / baseline / value narrative / hourly valuation / value realization / cost base
/ attribution / outcome owner / released capacity / observed change

- 01 **Joel:** I signed off the time logs, not a proven-ROI claim. Can we go through the slide before this reaches the quarterly review?
- 02 **Kira:** You are right. The ¹ _____ is from forty staff hours to twenty-eight for the two recorded cycles. I have moved too quickly from that difference to a broader claim about return.
- 03 **Joel:** There were other process changes at the same time. We simplified the approval route as well as introducing the product.
- 04 **Kira:** Then ² _____ needs qualification. The comparison does not isolate what the product caused. We can report the change without claiming that every hour came from one feature or supplier.
- 05 **Joel:** The twelve-hour difference is correct. Where did the forty-dollar hourly number come from?
- 06 **Kira:** It is an unvalidated ³ _____ in my calculation. At that rate, twelve hours would be worth four hundred eighty dollars for a cycle, but I should not present your approval as already given.

E Conversation / continued

- 07 **Joel:** And the five-thousand-seven-hundred-sixty-dollar annual figure assumes that the same thing happens every month?
- 08 **Kira:** Yes. That ⁴ _____ assumes twelve monthly cycles with the same difference and the same valuation. We have one before-and-after comparison, not twelve months of validated recurring benefits.
- 09 **Joel:** Nobody's pay has changed, and we have not reduced the team. The time may be useful, but it has not disappeared from our expenditure.
- 10 **Kira:** Then ⁵ _____ is the relevant distinction. Staff may use the time for other work. Calling it a cash saving would imply a spending reduction that you have not reported.

Conversation continues on the next page.

Replace the impressive ROI claim with a defensible value story

CONVERSATION / CONTINUED

- 11 **Joel:** We pay thirty-six hundred annually for the subscription. The implementation effort and training time are not fully in the model yet.
- 12 **Kira:** The ⁶ _____ is incomplete. A return calculation needs the relevant benefits and costs on a consistent basis and over a defined period, not only the easiest numbers to find.
- 13 **Joel:** I am not saying there is no value. The reporting cycle took less time. I want that useful result kept, without turning it into money we have not saved.
- 14 **Kira:** Agreed. We can build a stronger ⁷ _____ around what we know. The recorded change is useful; the mistake was presenting an assumed financial interpretation as an established result.
- 15 **Joel:** For the next review, let us measure the same reporting task across more cycles. Otherwise changes in the task itself could distort the comparison.
- 16 **Kira:** We will keep the ⁸ _____ and task definition explicit. We should also record relevant process changes and exceptions rather than quietly treating unlike cycles as equivalent.
- 17 **Joel:** I can validate the finance inputs, while our operations lead confirms the time records and what people actually do with the released hours.
- 18 **Kira:** Naming an ⁹ _____ for each measure will help. Your finance validation and the operations evidence answer different questions, so neither should be substituted for the other.

Replace the impressive ROI claim with a defensible value story / continued

- 19 **Joel:** Please revise the slide before the business review. Keep the time difference, but remove the proven-return headline.
- 20 **Kira:** I will describe ¹⁰ _____ only where we have evidence. The revised slide will show the observed twelve-hour difference, label the assumptions, identify missing costs, and state the next validation steps.

CHECK THE GAPS

1. observed change / **2.** attribution / **3.** hourly valuation / **4.** annualization / **5.** released capacity / **6.** cost base / **7.** value narrative / **8.** baseline / **9.** outcome owner / **10.** value realization

[Why these answers fit, page 140](#)

F Check accuracy and scope

Replace the impressive ROI claim with a defensible value story

Return to the case

For a quarterly business review, Kira prepares a slide claiming proven savings and return on investment. Customer finance lead Joel confirms logs showing 40 staff hours for one reporting cycle before implementation and 28 for one cycle afterward. Other process changes occurred too. Kira values the 12-hour difference at an unvalidated \$40 per hour and annualizes it over 12 months. The annual subscription costs \$3,600; implementation and training costs are not fully recorded. Staffing expenditure has not changed. The slide must distinguish observations, assumptions, attribution, and missing costs.

Choose one answer per question. Use the case facts and keep any uncertainty or limits intact.

1. Which cost statement is accurate?

- A. Subscription cost can be ignored when calculating ROI.
- B. Missing costs prove the investment lost money.
- C. The \$3,600 subscription is known, but the full cost base is incomplete.
- D. All implementation and training costs are confirmed zero.

2. Which review conclusion is strongest?

- A. Keep the proven-ROI headline and hide its assumptions.
- B. Replace missing evidence with a larger hourly rate.
- C. Report the observed operational change and agree a consistent validation plan.
- D. Remove every positive finding because attribution is uncertain.

[Answers and explanations, page 142](#)

Listen for the distinction

Check all ten gaps. Reread the forty-dollar assumption, twelve-cycle annualization, and incomplete cost base.

A challenge to the numbers can strengthen the relationship

A customer questioning a value slide is not necessarily rejecting the product. Welcome the distinction between useful operational improvement and an unsupported financial claim. Agree which figures the customer validates, which remain assumptions, and what evidence the next review needs.

F Say it / transfer to a new case

Explain another conditional value estimate

A team records 30 hours before and 24 hours after a change for one cycle. An unvalidated rate of \$35 per hour is used. Staffing expenditure is unchanged, and implementation costs are missing.

Complete the four gaps. With a partner, read alternate roles, then switch. Studying alone, read both roles and pause before each response.

WORD AND PHRASE BANK

cash savings / \$210 / implementation costs / six hours

- 01 **Customer:** The observed time difference is ¹ _____.
- 02 **Manager:** At the assumed rate, the cycle value would be ² _____.
- 03 **Customer:** Unchanged expenditure means this is not verified ³ _____.
- 04 **Manager:** A full return calculation still lacks ⁴ _____.

CHECK THE GAPS

1. six hours / 2. \$210 / 3. cash savings / 4. implementation costs

[Why these answers fit, page 142](#)

Rebuild the exchange

Choose the missing response. Read the completed three-turn exchange aloud, changing roles on the second reading.

1. Rebuild the exchange from "Replace the impressive ROI claim with a defensible value story". Joel: "I am not saying there is no value. The reporting cycle took less time. I want that useful result kept, without turning it into money we have not saved." Kira: [missing response] Joel: "For the next review, let us measure the same reporting task across more cycles. Otherwise changes in the task itself could distort the comparison." Which response belongs in the gap?

- A.** Then attribution needs qualification. The comparison does not isolate what the product caused. We can report the change without claiming that every hour came from one feature or supplier.
- B.** Then released capacity is the relevant distinction. Staff may use the time for other work. Calling it a cash saving would imply a spending reduction that you have not reported.
- C.** Agreed. We can build a stronger value narrative around what we know. The recorded change is useful; the mistake was presenting an assumed financial interpretation as an established result.
- D.** The cost base is incomplete. A return calculation needs the relevant benefits and costs on a consistent basis and over a defined period, not only the easiest numbers to find.

[Answers and explanations, page 143](#)

Review 2 / Meaning and context

Use language from the lessons you have completed. Choose one answer per question.

Case file

Revisit "Support Escalations and Incident Communication" and "QBRs and Business Outcomes". Choose precise terminology, then reconstruct the missing responses using both neighboring turns. The final two questions also revisit earlier conversations.

1. A colleague needs the term for this meaning: A customer account known to experience the issue. Which term fits?

- A. known limitation
- B. support case
- C. mitigation
- D. affected account

2. A colleague needs the term for this meaning: Staff time made available for other work. Which term fits?

- A. validation
- B. released capacity
- C. ROI
- D. QBR

3. Rebuild the exchange from "The green score hides a workflow gap". Mei: "Before we act on thirty, I want to know what the system calls a completed approval. Could starting a request count?" Daniel: [missing response] Mei: "The supervisors say people return to email when they cannot identify the next approver. I do not yet know whether that is configuration or training." Which response belongs in the gap?

- A. That is a useful adoption barrier to investigate. Let us look at the affected roles and steps before prescribing another general training session or assuming people simply dislike change.
- B. Agreed. The usage gap deserves action, but it does not prove cancellation. We will validate the measure, investigate the approver obstacle, and agree what improvement we should check next.
- C. We can review the weighting and the signals with our team. The purpose is a more useful account picture, not a different color chosen to justify a conclusion we already want.
- D. We should verify the event definition. A started request and a completed workflow are different events. We need to confirm that the recorded signal matches the action we are discussing.

Review 2 / Meaning and context / continued

4. Rebuild the exchange from "Replace the impressive ROI claim with a defensible value story". Joel: "I can validate the finance inputs, while our operations lead confirms the time records and what people actually do with the released hours." Kira: [missing response] Joel: "Please revise the slide before the business review. Keep the time difference, but remove the proven-return headline." Which response belongs in the gap?

- A.** Yes. That annualization assumes twelve monthly cycles with the same difference and the same valuation. We have one before-and-after comparison, not twelve months of validated recurring benefits.
- B.** Then attribution needs qualification. The comparison does not isolate what the product caused. We can report the change without claiming that every hour came from one feature or supplier.
- C.** We will keep the baseline and task definition explicit. We should also record relevant process changes and exceptions rather than quietly treating unlike cycles as equivalent.
- D.** Naming an outcome owner for each measure will help. Your finance validation and the operations evidence answer different questions, so neither should be substituted for the other.

[Answers and explanations, page 167](#)

A Read the situation

LESSON 05 / RENEWALS AND CHURN RISK

Explore changed priorities, verify decision roles, and describe renewal risk without treating it as a verdict.

Rebuild the renewal conversation after the main contact leaves

Account R31 has a \$60,000 annual recurring subscription scheduled for renewal on 12 November, six weeks away. Its main contact has left. New operations contact Ella has not confirmed current priorities or who owns the renewal decision and budget. Earlier reports focused on reducing a service backlog, but the business is now reorganizing. Customer success manager Rafael has no cancellation notice and no renewal approval. Ella agrees to a discovery meeting on 8 October at 10:00 UTC. Actual notice terms and the purchasing route still need checking.

People: Ella, New customer operations contact; Rafael, Customer success manager.

Read the record

Choose one answer per question using the facts above.

1. What is the renewal date?

- A. 8 October
- B. The day the former contact left
- C. A new date already approved by Ella
- D. 12 November

2. What is known about the decision?

- A. Ella has approved the renewal.
- B. The former contact's departure cancels the agreement.
- C. Reorganization guarantees an expansion.
- D. Neither cancellation nor renewal approval has been received.

3. What is the next agreed customer event?

- A. A discovery meeting on 8 October at 10:00 UTC
- B. Contract signature at 10:00 UTC
- C. Automatic approval of a discount
- D. Completion of every procurement step

[Answers and explanations, page 144](#)

B Vocabulary in use

CORE TERMS

renewal

Continuation of an agreement or subscription under applicable terms.

coordinate a renewal

renewal owner

The role coordinating or responsible for the renewal decision process.

identify the renewal owner

stakeholder change

A change in people involved in or influencing the relationship.

track stakeholder changes

champion

An internal advocate who actively helps the initiative progress.

verify the champion relationship

churn risk

The possibility of losing customer business, with its basis specified.

assess churn risk

revenue churn

Recurring revenue lost under a specified measurement definition.

distinguish revenue churn

renewal date

The date specified for the relevant renewal event.

verify the renewal date

budget owner

The person accountable for the relevant funding decision.

confirm the budget owner

executive sponsor

A senior person supporting the initiative within the customer organization.

reestablish executive sponsorship

reorganization

A change in organizational structure, roles, or responsibilities.

understand reorganization effects

logo churn

Loss of customer accounts, distinct from the amount of revenue lost.

measure logo churn

contraction

A reduction in business from an existing customer.

identify contraction risk

Say it in context

Stress the highlighted expression. Keep the surrounding words connected; pause at the end of the phrase.

renewal **RENEWAL**

coordinate a renewal

Keep the meaning precise: Continuation of an agreement or subscription under applicable terms.

executive sponsor **EXECUTIVE SPONSOR**

reestablish executive sponsorship

Keep the meaning precise: A senior person supporting the initiative within the customer organization.

B Precision and professional shorthand

EXTEND YOUR RANGE

retention

Continuation of customer business under a stated measure.

improve customer retention

NRR

Net revenue retention; retained starting recurring revenue including expansion on a defined basis.

calculate NRR

risk signal

Evidence that may indicate a potential problem, not a certain outcome.

record a risk signal

renewal forecast

An estimate of renewal outcomes based on current evidence.

update the renewal forecast

procurement route

The customer's process for reviewing and completing a purchase.

verify the procurement route

GRR

Gross revenue retention; retained starting recurring revenue excluding expansion on a defined basis.

calculate GRR

ARR

Annual recurring revenue, measured under the organization's stated inclusion rules.

verify ARR

save plan

A defined set of actions addressing an evidenced retention risk.

agree a save plan

notice provision

A contract term concerning required notices and their conditions.

review notice provisions

value evidence

Information supporting an actual customer benefit.

refresh value evidence

B Precision and professional shorthand / continued

success criterion

A condition used to judge achievement of a desired result.

reconfirm success criteria

renewal plan

A shared sequence of renewal actions, owners, and dates.

maintain the renewal plan

Say it in context

Stress the highlighted expression. Keep the surrounding words connected; pause at the end of the phrase.

contraction **CONTRACTION**

identify contraction risk

Keep the meaning precise: A reduction in business from an existing customer.

risk signal **RISK SIGNAL**

record a risk signal

Keep the meaning precise: Evidence that may indicate a potential problem, not a certain outcome.

Phrases that move the work forward

Acknowledge the transition

I understand that responsibilities have changed since our last review.

Give a factual handover

Earlier discussions focused on reducing the service backlog.

Confirm the date

The recorded renewal date is the twelfth of November.

Ask about ownership

Who now coordinates the renewal decision?

Respect the new contact

How would you prefer us to involve the other decision participants?

Check contractual details

Let us verify the actual notice provisions rather than assume them.

Avoid premature discounting

We should understand the issue before proposing a commercial change.

Keep the forecast honest

The outcome remains unconfirmed while those gaps are open.

Avoid inherited assumptions

I do not want to assume the previous priorities are still yours.

Ask about the present

Which outcomes matter most during the reorganization?

Separate status from risk

We have neither a cancellation notice nor renewal approval.

Check funding separately

Who owns the relevant budget?

Verify the process

We need the current purchasing route and required steps.

Use evidence

Which results can your team validate from the last period?

Make the next meeting useful

Let us use the eighth of October to confirm priorities and decision roles.

Close the plan

Record each action, owner, evidence source, and next date.

Precision in real exchanges

Purpose: Ask about the present

Useful wording: Which outcomes matter most during the reorganization?

Purpose: Confirm the date

Useful wording: The recorded renewal date is the twelfth of November.

D Choose the response that fits

Choose one response for each situation. Preserve the facts, the decision boundary, and the purpose of the exchange.

1. Which internal renewal update is justified?

- A.** The contact has changed; priorities and decision roles need confirmation; the outcome is open.
- B.** The account is lost because the old contact left.
- C.** The renewal is certain because a meeting is booked.
- D.** An immediate discount has already solved the risk.

2. What should Rafael ask Ella first?

- A.** What matters now and who participates in the decision
- B.** Why she has already rejected the product
- C.** Whether she will approve an unspecified discount today
- D.** Why she must preserve the former contact's priorities

3. A colleague needs the term for this meaning: The person accountable for the relevant funding decision. Which term fits?

- A.** churn risk
- B.** budget owner
- C.** NRR
- D.** procurement route

D Choose the response that fits / continued

4. Rebuild the exchange from "Rebuild the renewal conversation after the main contact leaves". Rafael: "We can use our meeting on the eighth of October at ten hundred UTC to clarify that. Who else should contribute to the discussion?" Ella: [missing response] Rafael: "Agreed. We can distinguish operational needs, funding, and purchasing steps. I will keep you involved as we establish the right route." Which response belongs in the gap?

- A.** I can discuss operations, but I have only recently inherited this relationship. I do not yet know who is the renewal owner across our reorganized teams.
- B.** That makes sense. A save plan built around the wrong problem will not help us decide. There is no confirmed price objection for you to solve today.
- C.** Let me check the roles first. I do not want an invitation to imply that I am the budget owner or that finance has already approved continuation.
- D.** Please do. The stakeholder change has left some history scattered across people. A brief factual handover would help more than a presentation assuming everyone already supports the old plan.

[Answers and explanations, page 144](#)

One useful distinction

A contact leaving is a risk signal, not a cancellation. An agreed meeting is progress, not renewal approval. The \$60,000 recurring amount does not include an invented expansion or establish recognized revenue. Verify dates and notice terms in the actual agreement.

E Conversation

Rebuild the renewal conversation after the main contact leaves

Rebuild the renewal conversation after the main contact leaves

Complete the numbered gaps. Use each bank entry once; some entries contain several words.

WORD AND PHRASE BANK

renewal owner / value evidence / renewal forecast / budget owner / stakeholder change
/ success criteria / risk signal / procurement route / renewal plan / save plan

- 01 **Rafael:** Thanks for picking this up during the reorganization. Renewal is November twelfth, but before we discuss terms, what has changed for your team?
- 02 **Ella:** I can discuss operations, but I have only recently inherited this relationship. I do not yet know who is the ¹ _____ across our reorganized teams.
- 03 **Rafael:** That is helpful to know. Our earlier reviews focused on reducing the service backlog, but I do not want to assume that is still the main priority.
- 04 **Ella:** Backlog matters, but we are also combining two service teams. The ² _____ may need to change. I need to speak with the new director before confirming what the combined team requires.
- 05 **Rafael:** We can use our meeting on the eighth of October at ten hundred UTC to clarify that. Who else should contribute to the discussion?
- 06 **Ella:** Let me check the roles first. I do not want an invitation to imply that I am the ³ _____ or that finance has already approved continuation.

Conversation / continued

- 07 **Rafael:** Agreed. We can distinguish operational needs, funding, and purchasing steps. I will keep you involved as we establish the right route.
- 08 **Ella:** Please do. The ⁴ _____ has left some history scattered across people. A brief factual handover would help more than a presentation assuming everyone already supports the old plan.
- 09 **Rafael:** I can summarize the agreed objectives, recorded usage, and the results previously discussed, marking anything that still needs your validation.
- 10 **Ella:** That ⁵ _____ will be useful. Please separate actual outcomes from estimates. The new director will ask what the team gained, not simply how many meetings the supplier held.

Conversation continues on the next page.

Rebuild the renewal conversation after the main contact leaves

CONVERSATION / CONTINUED

- 11 **Rafael:** Understood. Internally, I have recorded the contact change as something we need to address, not as proof that the account is leaving.
- 12 **Ella:** Good. A ⁶ _____ is not a decision from us. We have sent neither a cancellation notice nor an approval to renew.
- 13 **Rafael:** Before we discuss terms, we should also verify the agreement's notice requirements and the current purchasing steps. I do not want to assume how those work.
- 14 **Ella:** I can help locate the right colleagues. The ⁷ _____ may have changed in the reorganization, so last year's contacts are not necessarily the people who can complete this year's process.
- 15 **Rafael:** I could ask about commercial options, but we have not established a price problem. Is the immediate issue fit, budget, the buying process, or missing context?
- 16 **Ella:** That makes sense. A ⁸ _____ built around the wrong problem will not help us decide. There is no confirmed price objection for you to solve today.
- 17 **Rafael:** I will keep the forecast open while we establish those facts. A scheduled discussion should not be reported as a completed renewal.
- 18 **Ella:** Please make the ⁹ _____ reflect that distinction. We can make progress without pretending the commercial decision has already happened.
- 19 **Rafael:** For the eighth, I will bring the factual history and open questions. You will confirm which roles should attend and what priorities they can speak to.
- 20 **Ella:** Yes. Then we can build a ¹⁰ _____ with the actual decision participants, owners, and dates. Keep the twelfth of November visible, but do not use it to invent approvals we have not given.

CHECK THE GAPS

1. renewal owner / 2. success criteria / 3. budget owner / 4. stakeholder change / 5. value evidence / 6. risk signal / 7. procurement route / 8. save plan / 9. renewal forecast / 10. renewal plan

[Why these answers fit, page 145](#)

F Check accuracy and scope

Rebuild the renewal conversation after the main contact leaves

Return to the case

Account R31 has a \$60,000 annual recurring subscription scheduled for renewal on 12 November, six weeks away. Its main contact has left. New operations contact Ella has not confirmed current priorities or who owns the renewal decision and budget. Earlier reports focused on reducing a service backlog, but the business is now reorganizing. Customer success manager Rafael has no cancellation notice and no renewal approval. Ella agrees to a discovery meeting on 8 October at 10:00 UTC. Actual notice terms and the purchasing route still need checking.

Choose one answer per question. Use the case facts and keep any uncertainty or limits intact.

1. For starting recurring revenue 100, loss 10, contraction 5, and expansion 20, what is GRR?

- A. 115%
- B. 85%
- C. 105%
- D. 95%

2. Using those same figures, what is NRR?

- A. 105%
- B. 85%
- C. 80%
- D. 120%

[Answers and explanations, page 147](#)

Listen for the distinction

Check the ten gaps. Reread the distinct operational, budget, procurement, and renewal-owner roles.

Do not make a new contact inherit old enthusiasm

A replacement stakeholder may have different priorities or knowledge from the previous contact. Give a brief factual handover and invite correction. A change in sponsorship is a reason to learn more, not permission to pressure the new person into endorsing an earlier plan.

F Say it / transfer to a new case

Describe another renewal without guessing the outcome

Account T08 renews on 20 December. Its sponsor has moved roles. New contact Hugo agrees to a needs review on 4 November but has not confirmed the budget owner. No renewal or cancellation decision is recorded.

Complete the four gaps. With a partner, read alternate roles, then switch. Studying alone, read both roles and pause before each response.

WORD AND PHRASE BANK

20 December / unconfirmed / needs review / open

- 01 **Manager:** The recorded renewal date is ¹ _____.
- 02 **Contact:** The fourth of November is a ² _____.
- 03 **Manager:** The funding decision role remains ³ _____.
- 04 **Contact:** The commercial outcome is still ⁴ _____.

CHECK THE GAPS

1. 20 December / 2. needs review / 3. unconfirmed / 4. open

[Why these answers fit, page 147](#)

F Say it / transfer to a new case / continued

Rebuild the exchange

Choose the missing response. Read the completed three-turn exchange aloud, changing roles on the second reading.

1. Rebuild the exchange from "Rebuild the renewal conversation after the main contact leaves". Rafael: "Before we discuss terms, we should also verify the agreement's notice requirements and the current purchasing steps. I do not want to assume how those work." Ella: [missing response] Rafael: "I could ask about commercial options, but we have not established a price problem. Is the immediate issue fit, budget, the buying process, or missing context?" Which response belongs in the gap?

- A.** Backlog matters, but we are also combining two service teams. The success criteria may need to change. I need to speak with the new director before confirming what the combined team requires.
- B.** Please do. The stakeholder change has left some history scattered across people. A brief factual handover would help more than a presentation assuming everyone already supports the old plan.
- C.** I can help locate the right colleagues. The procurement route may have changed in the reorganization, so last year's contacts are not necessarily the people who can complete this year's process.
- D.** That value evidence will be useful. Please separate actual outcomes from estimates. The new director will ask what the team gained, not simply how many meetings the supplier held.

[Answers and explanations, page 148](#)

A Read the situation

LESSON 06 / EXPANSION AND UPSELL ETHICS

Explore additional demand, verify license rights, and align expansion with readiness and customer benefit.

Check the existing capacity before selling more seats

Customer administrator Nora asks success manager Sam for 25 additional licenses for a new team. The account already holds 80 named-user licenses: 50 assigned and 30 unassigned. Of the 50 assigned users, 35 have completed onboarding. The new team needs the same proposed workflow, but its requirements and training availability are unconfirmed. Use of existing unassigned seats requires the customer license owner to confirm entitlement and allocation. No additional purchase or allocation has been approved. Sam must assess fit and readiness before presenting a justified commercial option.

People: Nora, Customer administrator; Sam, Customer success manager.

Read the record

Choose one answer per question using the facts above.

1. How many existing seats are unassigned?

- A. 50
- B. 30
- C. 25
- D. 15

2. How many assigned users have completed onboarding?

- A. 35 of 80 newly added users
- B. 50 of 50
- C. 25 of 30
- D. 35 of 50

3. What must happen before using existing unassigned seats?

- A. Training completion automatically changes the contract.
- B. The customer license owner must confirm entitlement and allocation.
- C. Sam may silently assign them to any organization.
- D. A new order must always be signed first.

[Answers and explanations, page 149](#)

B Vocabulary in use

CORE TERMS

expansion

Growth in business with an existing customer.

assess an expansion opportunity

cross-sell

Sale of a different, related offering to an existing customer.

assess cross-sell fit

named-user license

An access entitlement assigned to an identified individual under the agreement.

verify named-user licenses

assigned seat

A license allocated to a specified user under the relevant rules.

review assigned seats

license utilization

Use or allocation of licenses under a stated measurement definition.

define license utilization

allocation

Assignment of available resources or access to a purpose or user.

approve license allocation

upsell

A move to a higher-value quantity, tier, or offering.

justify an upsell

seat

A unit of user access under specified licensing terms.

count available seats

concurrent-user license

Access measured by simultaneous use under the agreement's rules.

distinguish concurrent-user licensing

unassigned seat

A license not currently allocated to a user.

verify unassigned seats

entitlement

The access or usage rights granted by the applicable agreement.

confirm entitlement

license owner

The customer role responsible for managing the relevant license rights.

consult the license owner

Say it in context

Stress the highlighted expression. Keep the surrounding words connected; pause at the end of the phrase.

expansion EXPANSION

assess an expansion opportunity

Keep the meaning precise: Growth in business with an existing customer.

concurrent-user license CONCURRENT-USER LICENSE

distinguish concurrent-user licensing

Keep the meaning precise: Access measured by simultaneous use under the agreement's rules.

B Precision and professional shorthand

EXTEND YOUR RANGE

onboarding completion

Completion of defined preparation steps for a user or group.

verify onboarding completion

incremental demand

Additional need beyond an established baseline.

establish incremental demand

commercial option

A proposed purchase arrangement with defined scope and terms.

compare commercial options

proration

Proportional charging for a partial period under stated rules.

explain proration

true-up

Adjustment to align reported or licensed usage with contractual requirements.

review true-up terms

readiness gap

A missing condition needed for effective use.

address readiness gaps

fit assessment

Evaluation of whether an offering meets the relevant needs.

conduct a fit assessment

order form

The document specifying the relevant purchase details and terms.

review the order form

co-termination

Aligning the end dates of subscriptions under agreed terms.

discuss co-termination

shelfware

Informal term for purchased software that is little used or unused.

investigate shelfware

B Precision and professional shorthand / continued

expansion readiness

Evidence that added scope can be used effectively.

assess expansion readiness

customer benefit

A relevant advantage for the customer, supported by evidence or clearly labeled assumptions.

establish customer benefit

Say it in context

Stress the highlighted expression. Keep the surrounding words connected; pause at the end of the phrase.

license owner LICENSE OWNER

consult the license owner

Keep the meaning precise: The customer role responsible for managing the relevant license rights.

commercial option COMMERCIAL OPTION

compare commercial options

Keep the meaning precise: A proposed purchase arrangement with defined scope and terms.

Phrases that move the work forward

Explore the request

What work will the twenty-five new users need to complete?

Qualify availability

We need the license owner to confirm that those seats can be allocated to this team.

Check the arithmetic

Allocating twenty-five existing seats would leave five unassigned.

State the readiness gap

Fifteen currently assigned users have not completed onboarding.

Ask about resources

Who will own onboarding for the new team?

Keep alternatives open

A justified additional purchase remains an option if existing rights do not meet the need.

Avoid pressure

I will not invent an expiry date to accelerate the purchase.

Avoid credential sharing

Use the approved user-access arrangement rather than shared named-user identities.

Check current capacity

The account has thirty unassigned seats.

Avoid an automatic sale

The request does not yet establish a need for twenty-five additional licenses.

Respect the terms

Allocation must follow the actual entitlement and approved process.

Avoid a false equivalence

Training completion does not prove regular workflow use.

Assess fit

Let us confirm their workflow and access requirements.

Separate two decisions

License allocation and readiness for use need separate confirmation.

Explain an actual quote

Any proposal will show quantity, term, charges, and approval status.

Close with next steps

Verify entitlement, confirm the workflow, and agree the onboarding owner before recommending quantity.

Precision in real exchanges

Purpose: Avoid an automatic sale

Useful wording: The request does not yet establish a need for twenty-five additional licenses.

Purpose: Check the arithmetic

Useful wording: Allocating twenty-five existing seats would leave five unassigned.

D Choose the response that fits

Choose one response for each situation. Preserve the facts, the decision boundary, and the purpose of the exchange.

1. Which response best fits the request?

- A.** Promise free reassignment before the license owner confirms it.
- B.** Refuse every expansion until all users complete every possible feature.
- C.** Confirm needs and allocation rights before deciding whether additional licenses are necessary.
- D.** Immediately quote 25 new seats without checking existing capacity.

2. If 25 existing unassigned seats are authorized for the new team, how many remain?

- A.** 55
- B.** 5
- C.** 15
- D.** 30

3. A colleague needs the term for this meaning: A unit of user access under specified licensing terms. Which term fits?

- A.** true-up
- B.** incremental demand
- C.** license utilization
- D.** seat

D Choose the response that fits / continued

4. Rebuild the exchange from "Check the existing capacity before selling more seats". Nora: "I will involve our license owner. If those seats can be allocated, the remaining number would be five, correct?" Sam: [missing response] Nora: "I also see that only thirty-five of our fifty assigned users have finished onboarding. I do not want the new group to repeat the same difficulties." Which response belongs in the gap?

- A.** That is a readiness gap separate from license quantity. Who will own their preparation, and when can the relevant users practice the workflow they actually need?
- B.** Correct, subject to that approved allocation. Twenty-five taken from thirty leaves five. It would not increase the total from eighty to one hundred five.
- C.** Correct. These are named-user licenses. Follow the approved identity and access arrangement; do not use shared credentials as a shortcut around the actual license or security requirements.
- D.** Then include that in the fit assessment. More seats do not solve a workflow mismatch by themselves. We should check capability and configuration alongside the training plan.

[Answers and explanations, page 149](#)

One useful distinction

The account has 30 unassigned seats, but availability is not automatically permission to allocate them. If the license owner authorizes 25 of those seats for the new team, 5 would remain unassigned; no additional quantity is assumed necessary from the count alone.

E Conversation

Check the existing capacity before selling more seats

Check the existing capacity before selling more seats

Complete the numbered gaps. Use each bank entry once; some entries contain several words.

WORD AND PHRASE BANK

allocation / Expansion readiness / onboarding completion / fit assessment /
commercial option / named-user licenses / readiness gap / entitlement /
incremental demand / unassigned seats

- 01 **Nora:** Another team wants access. Can you send an order for twenty-five licenses? I want to get them started without delaying their work.
- 02 **Sam:** I can help assess that, but let us check the existing ¹ _____ first. Your account has eighty licenses, fifty assigned and thirty unassigned. We should understand whether the new team needs additional rights or an allocation of existing capacity.
- 03 **Nora:** They expect to use the same approval workflow. Does having thirty spare seats mean I can assign twenty-five immediately?
- 04 **Sam:** We need the license owner to confirm the ² _____ and allocation. The count shows potential capacity, but I should not interpret the agreement or approve a different team's access on your behalf.
- 05 **Nora:** I will involve our license owner. If those seats can be allocated, the remaining number would be five, correct?
- 06 **Sam:** Correct, subject to that approved ³ _____. Twenty-five taken from thirty leaves five. It would not increase the total from eighty to one hundred five.

E Conversation / continued

- 07 **Nora:** I also see that only thirty-five of our fifty assigned users have finished onboarding. I do not want the new group to repeat the same difficulties.
- 08 **Sam:** That ⁴ _____ figure is seventy percent of assigned users. We should identify the unfinished steps and barriers, but we should not assume every person has the same problem or that training alone proves adoption.
- 09 **Nora:** The new team has not confirmed who will attend training. Their manager asked for access before discussing the practical schedule.
- 10 **Sam:** That is a ⁵ _____ separate from license quantity. Who will own their preparation, and when can the relevant users practice the workflow they actually need?

Conversation continues on the next page.

Check the existing capacity before selling more seats

CONVERSATION / CONTINUED

- 11 **Nora:** I can ask the manager. Would you still be willing to quote more seats if our existing rights do not cover that team?
- 12 **Sam:** Certainly. We should establish ⁶ _____ after checking the actual rights and requirements. A suitable additional purchase is a valid option; it just needs a customer basis rather than an assumption from the first request.
- 13 **Nora:** There is one difference in their workflow: an extra approval step. We have not checked whether our current configuration can handle it.
- 14 **Sam:** Then include that in the ⁷ _____. More seats do not solve a workflow mismatch by themselves. We should check capability and configuration alongside the training plan.
- 15 **Nora:** Some teams have shared access in other systems. I assume that is not something we should improvise here.
- 16 **Sam:** Correct. These are ⁸ _____. Follow the approved identity and access arrangement; do not use shared credentials as a shortcut around the actual license or security requirements.
- 17 **Nora:** Once we know the right quantity, I will need a clear explanation of the term and any partial-period charge.
- 18 **Sam:** Any ⁹ _____ should show those details, including the applicable charging basis. I will not invent a discount deadline or imply a new order is approved before your purchasing process is complete.

Check the existing capacity before selling more seats / continued

- 19 **Nora:** Then the immediate decision is not buy twenty-five or buy nothing. It is establish what rights and preparation the team needs.
- 20 **Sam:** Exactly. ¹⁰ _____ comes from those facts. Let us confirm the license owner, the workflow requirements, and the onboarding owner, then recommend the quantity and arrangement that actually serve the team.

CHECK THE GAPS

1. unassigned seats / **2.** entitlement / **3.** allocation / **4.** onboarding completion / **5.** readiness gap / **6.** incremental demand / **7.** fit assessment / **8.** named-user licenses / **9.** commercial option / **10.** Expansion readiness

[Why these answers fit, page 150](#)

F Check accuracy and scope

Check the existing capacity before selling more seats

Return to the case

Customer administrator Nora asks success manager Sam for 25 additional licenses for a new team. The account already holds 80 named-user licenses: 50 assigned and 30 unassigned. Of the 50 assigned users, 35 have completed onboarding. The new team needs the same proposed workflow, but its requirements and training availability are unconfirmed. Use of existing unassigned seats requires the customer license owner to confirm entitlement and allocation. No additional purchase or allocation has been approved. Sam must assess fit and readiness before presenting a justified commercial option.

Choose one answer per question. Use the case facts and keep any uncertainty or limits intact.

1. What is the stated onboarding completion rate among assigned users?

- A. 70%
- B. 43.75%
- C. 62.5%
- D. 30%

2. Which proposal would be transparent?

- A. A quantity chosen only to meet the supplier's target
- B. A promise that every unassigned seat may be used anywhere
- C. A shared-login plan presented as named-user compliance
- D. A justified quantity with term, charges, allocation basis, and approval status

[Answers and explanations, page 152](#)

Listen for the distinction

Correct the ten gaps. Reread the conditional five-seat remainder and 35/50 onboarding rate with the right denominators.

A useful commercial conversation can begin with restraint

Customers may ask for a product quantity as a shortcut to describing a business need. Clarify the need and existing capacity before assuming the right purchase. Explain remaining work honestly, and do not use an adoption problem merely as a reason to withhold a suitable option.

F Say it / transfer to a new case

Assess another request for more licenses

An account has 100 licenses, with 70 assigned and 30 unassigned. A new team needs 20 users. Existing allocation rights need confirmation. Of the 70 assigned users, 49 have completed onboarding.

Complete the four gaps. With a partner, read alternate roles, then switch. Studying alone, read both roles and pause before each response.

WORD AND PHRASE BANK

30 / 70% / entitlement / ten

- 01 **Manager:** The unassigned count is ¹ _____.
- 02 **Customer:** If twenty existing seats are authorized, ² _____ remain.
- 03 **Manager:** Onboarding completion among assigned users is ³ _____.
- 04 **Customer:** Before allocation, we must confirm ⁴ _____.

CHECK THE GAPS

1. 30 / 2. ten / 3. 70% / 4. entitlement

[Why these answers fit, page 152](#)

Rebuild the exchange

Choose the missing response. Read the completed three-turn exchange aloud, changing roles on the second reading.

1. Rebuild the exchange from "Check the existing capacity before selling more seats".
Nora: "There is one difference in their workflow: an extra approval step. We have not checked whether our current configuration can handle it." Sam: [missing response] Nora: "Some teams have shared access in other systems. I assume that is not something we should improvise here." Which response belongs in the gap?

- A.** That is a readiness gap separate from license quantity. Who will own their preparation, and when can the relevant users practice the workflow they actually need?
- B.** Correct, subject to that approved allocation. Twenty-five taken from thirty leaves five. It would not increase the total from eighty to one hundred five.
- C.** Correct. These are named-user licenses. Follow the approved identity and access arrangement; do not use shared credentials as a shortcut around the actual license or security requirements.
- D.** Then include that in the fit assessment. More seats do not solve a workflow mismatch by themselves. We should check capability and configuration alongside the training plan.

[Answers and explanations, page 153](#)

Review 3 / Meaning and context

Use language from the lessons you have completed. Choose one answer per question.

Case file

Revisit "Renewals and Churn Risk" and "Expansion and Upsell Ethics". Choose precise terminology, then reconstruct the missing responses using both neighboring turns. The final two questions also revisit earlier conversations.

1. A colleague needs the term for this meaning: The role coordinating or responsible for the renewal decision process. Which term fits?

- A. reorganization
- B. GRR
- C. notice provision
- D. renewal owner

2. A colleague needs the term for this meaning: A license not currently allocated to a user. Which term fits?

- A. expansion
- B. unassigned seat
- C. onboarding completion
- D. proration

3. Rebuild the exchange from "Replace the impressive ROI claim with a defensible value story". Joel: "Nobody's pay has changed, and we have not reduced the team. The time may be useful, but it has not disappeared from our expenditure." Kira: [missing response] Joel: "We pay thirty-six hundred annually for the subscription. The implementation effort and training time are not fully in the model yet." Which response belongs in the gap?

- A. Then released capacity is the relevant distinction. Staff may use the time for other work. Calling it a cash saving would imply a spending reduction that you have not reported.
- B. Agreed. We can build a stronger value narrative around what we know. The recorded change is useful; the mistake was presenting an assumed financial interpretation as an established result.
- C. Then attribution needs qualification. The comparison does not isolate what the product caused. We can report the change without claiming that every hour came from one feature or supplier.
- D. The cost base is incomplete. A return calculation needs the relevant benefits and costs on a consistent basis and over a defined period, not only the easiest numbers to find.

Review 3 / Meaning and context / continued

4. Rebuild the exchange from "Check the existing capacity before selling more seats". Nora: "Once we know the right quantity, I will need a clear explanation of the term and any partial-period charge." Sam: [missing response] Nora: "Then the immediate decision is not buy twenty-five or buy nothing. It is establish what rights and preparation the team needs." Which response belongs in the gap?

- A.** We need the license owner to confirm the entitlement and allocation. The count shows potential capacity, but I should not interpret the agreement or approve a different team's access on your behalf.
- B.** Exactly. Expansion readiness comes from those facts. Let us confirm the license owner, the workflow requirements, and the onboarding owner, then recommend the quantity and arrangement that actually serve the team.
- C.** Any commercial option should show those details, including the applicable charging basis. I will not invent a discount deadline or imply a new order is approved before your purchasing process is complete.
- D.** That onboarding completion figure is seventy percent of assigned users. We should identify the unfinished steps and barriers, but we should not assume every person has the same problem or that training alone proves adoption.

[Answers and explanations, page 170](#)

A Read the situation

LESSON 07 / PRODUCT FEEDBACK AND FEATURE REQUESTS

Turn a proposed feature into a precise problem, usable evidence, and a responsible product-team handoff.

Discover the workflow behind the requested button

Customer operations lead Nia requests a bulk-approval button. Twenty approvers handle about 200 requests weekly; around 40 need individual exception review. Staff report repeated navigation between similar requests. The customer requires a separate authorized decision record for each request. The current product offers a saved filtered view but no confirmed bulk-approval capability. Success manager Teo must clarify the repeated work and pass the need to product manager Arun. Logging the request does not assign delivery priority or a release date. Any interim approach must preserve the decision-record requirement.

People: Nia, Customer operations lead; Teo, Customer success manager.

Read the record

Choose one answer per question using the facts above.

1. What problem has the customer reported?

- A. A confirmed inability to sign in
- B. A verified loss of all approval records
- C. A request to remove all authorization
- D. Repeated navigation between similar approval requests

2. What record must an interim approach preserve?

- A. A separate authorized decision for each request
- B. Only one anonymous decision per week
- C. No record for routine requests
- D. A single record covering all twenty approvers

3. What does logging the feature request establish?

- A. That the need has been recorded for assessment
- B. A committed delivery date
- C. The highest priority in the product plan
- D. A capability already released to all customers

[Answers and explanations, page 154](#)

B Vocabulary in use

CORE TERMS

feature request

A proposal for a product capability or change.
capture a feature request

use case

A specific situation in which a capability would be used.
document the use case

friction point

A step that creates avoidable difficulty or effort.
identify friction points

exception handling

The treatment of cases outside the normal pattern.
preserve exception handling

authorization

Permission to perform a specified action.
verify authorization

filter

A rule selecting which items are shown or processed.
validate the filter

problem statement

A clear description of the difficulty to be addressed.
refine the problem statement

workflow

The sequence of activities used to complete a task.
map the workflow

bulk action

An operation applied to multiple selected items.
assess bulk-action needs

audit trail

A traceable record of actions and decisions.
preserve the audit trail

saved view

A reusable display configured with selected criteria.
configure a saved view

interim approach

A temporary way of working pending a longer-term decision.
assess an interim approach

Say it in context

Stress the highlighted expression. Keep the surrounding words connected; pause at the end of the phrase.

feature request **FEATURE REQUEST**

capture a feature request

Keep the meaning precise: A proposal for a product capability or change.

bulk action **BULK ACTION**

assess bulk-action needs

Keep the meaning precise: An operation applied to multiple selected items.

B Precision and professional shorthand

EXTEND YOUR RANGE

user story

A concise expression of a user's need and intended value.

refine a user story

reproduction steps

A sequence allowing others to observe reported behavior.

provide reproduction steps

frequency

How often the relevant situation or action occurs.

quantify task frequency

product backlog

A maintained collection of potential product work.

review the product backlog

feasibility

Whether a proposed approach can be achieved under relevant constraints.

assess feasibility

discovery

Investigation of needs, context, and possible solutions.

support product discovery

acceptance criteria

Conditions used to judge whether a proposed solution meets the need.

define acceptance criteria

representative example

An example reflecting the relevant real-world pattern.

select representative examples

impact statement

An explanation of how a problem affects the customer's work.

verify the impact statement

prioritization

Deciding the relative order or importance of work.

explain prioritization

roadmap

A communicated plan for product direction and anticipated work.

qualify roadmap information

feedback loop

A process that returns assessment or outcome information to the source.

close the feedback loop

Say it in context

Stress the highlighted expression. Keep the surrounding words connected; pause at the end of the phrase.

interim approach INTERIM APPROACH

assess an interim approach

Keep the meaning precise: A temporary way of working pending a longer-term decision.

frequency FREQUENCY

quantify task frequency

Keep the meaning precise: How often the relevant situation or action occurs.

Phrases that move the work forward

Respect the idea

I understand why a bulk-approval button sounds useful.

Identify the obstacle

Is the main effort navigation, comparison, or the decision itself?

Separate exceptions

Which cases still need individual investigation?

Check the current option

The saved view may reduce navigation, but it is not bulk approval.

State the problem

Repeated navigation slows review of similar requests.

Request minimal evidence

An approved, de-identified example of the workflow is enough for the initial assessment.

Keep status clear

Recorded for assessment does not mean scheduled for release.

Return the response

I will bring the product team's assessment back to you.

Explore the sequence

Walk me through the repeated steps between two similar requests.

Quantify frequency

About how many requests follow this pattern each week?

Preserve the requirement

Every request must retain its own authorized decision record.

Avoid premature advice

We need to verify the filter and permissions before recommending that approach.

Define a useful result

Reduce repeated navigation while preserving individual decisions and exception visibility.

Explain the handoff

I will send the problem, frequency, impact, constraints, and examples to Arun.

Avoid a roadmap promise

I do not have an approved delivery date to share.

Close accurately

Let us confirm that this summary captures your need before we submit it.

Precision in real exchanges

Purpose: Quantify frequency

Useful wording: About how many requests follow this pattern each week?

Purpose: Separate exceptions

Useful wording: Which cases still need individual investigation?

D Choose the response that fits

Choose one response for each situation. Preserve the facts, the decision boundary, and the purpose of the exchange.

1. Which problem statement best represents the case?

- A.** Repeated navigation slows similar-request review while individual decisions must remain traceable.
- B.** The customer wants every request approved without review.
- C.** Forty exceptions prove that the entire product is unusable.
- D.** A new button is already approved for release.

2. Which interim statement is responsible?

- A.** A saved view automatically approves all visible records.
- B.** Routine requests no longer need individual decisions.
- C.** Any filter can replace the approval controls.
- D.** A saved view may help navigation, subject to verified filters and permissions.

3. A colleague needs the term for this meaning: The sequence of activities used to complete a task. Which term fits?

- A.** authorization
- B.** reproduction steps
- C.** feasibility
- D.** workflow

D Choose the response that fits / continued

4. Rebuild the exchange from "Discover the workflow behind the requested button".
Nia: "Yes. Even a routine request needs its own authorized decision. We cannot lose the record of who decided what." **Teo:** [missing response] **Nia:** "We currently move back to the full list after each review. Could the product at least keep the relevant requests together?" **Which response belongs in the gap?**

- A.** I understand the feature request. Before I pass it to product, can we identify which repeated steps are taking the time: finding the next request, comparing details, or making the decision?
- B.** Then the problem statement should name that repeated navigation. We should also preserve the distinction between similar requests and exceptions rather than assume all two hundred can be handled identically.
- C.** That audit trail is a required constraint, not an optional detail. About one hundred sixty non-exception requests does not mean one hundred sixty records can be approved without an individual decision.
- D.** Those are useful acceptance criteria for assessing an interim approach. We can check navigation, exception visibility, and the required individual decision record without removing the controls to make the demonstration look faster.

[Answers and explanations, page 154](#)

One useful distinction

About 200 requests and 40 exceptions suggest about 160 non-exception requests in that weekly pattern, not 160 automatically approvable records. Routine status does not remove the stated requirement for an authorized decision on each request.

E Conversation

Discover the workflow behind the requested button

Discover the workflow behind the requested button

Complete the numbered gaps. Use each bank entry once; some entries contain several words.

WORD AND PHRASE BANK

use case / impact statement / saved view / acceptance criteria / feedback loop /
audit trail / Prioritization / product backlog / feature request / problem statement

- 01 **Nia:** Could we have a bulk-approval button? Our approvers keep opening similar requests one by one, then going back to the full list.
- 02 **Teo:** I understand the ¹ _____. Before I pass it to product, can we identify which repeated steps are taking the time: finding the next request, comparing details, or making the decision?
- 03 **Nia:** Navigation is the part people complain about most. Twenty approvers handle about two hundred requests a week, and around forty need closer exception review.
- 04 **Teo:** Then the ² _____ should name that repeated navigation. We should also preserve the distinction between similar requests and exceptions rather than assume all two hundred can be handled identically.
- 05 **Nia:** Yes. Even a routine request needs its own authorized decision. We cannot lose the record of who decided what.
- 06 **Teo:** That ³ _____ is a required constraint, not an optional detail. About one hundred sixty non-exception requests does not mean one hundred sixty records can be approved without an individual decision.

E Conversation / continued

- 07 **Nia:** We currently move back to the full list after each review. Could the product at least keep the relevant requests together?
- 08 **Teo:** There is a ⁴ _____ that may help navigation. We need to check its filters and permissions for your workflow. It is not a bulk-approval function, and I do not want to describe it as one.
- 09 **Nia:** We can test whether the view helps, provided the exceptions stay visible and nobody gains permission they should not have.
- 10 **Teo:** Those are useful ⁵ _____ for assessing an interim approach. We can check navigation, exception visibility, and the required individual decision record without removing the controls to make the demonstration look faster.

Conversation continues on the next page.

Discover the workflow behind the requested button

CONVERSATION / CONTINUED

- 11 **Nia:** What does Arun need from us? I do not want my team to produce a long specification before anyone looks at the need.
- 12 **Teo:** A concise ⁶ _____ is enough for the initial discussion: who performs the task, the repeated steps, the frequency, and the obstacle. An approved de-identified example will help; we do not need unnecessary customer records.
- 13 **Nia:** Please make the navigation problem clear in your note. We are trying to avoid repeated clicks, not asking you to remove the individual review.
- 14 **Teo:** I will include that in the ⁷ _____. I will send the workflow, frequency, constraints, and examples to Arun, then confirm that the summary represents what you actually need.
- 15 **Nia:** Once the request is logged, does that mean it is in the next release? I need to explain the status internally.
- 16 **Teo:** No. A ⁸ _____ entry records potential work. Product still needs to assess the need, alternatives, effort, and wider priorities. I do not have an approved release date to share.
- 17 **Nia:** Could another customer need move ahead of ours even if our request came first?
- 18 **Teo:** Yes. ⁹ _____ considers more than submission order. I can explain the assessment status and the evidence we supplied, but I cannot promise a ranking before that decision is made.
- 19 **Nia:** Then keep us informed when the assessment changes, including if the team proposes a different way to solve the problem.
- 20 **Teo:** I will close the ¹⁰ _____. We will test the bounded interim option, preserve your decision requirements, and return the product response without confusing an idea, a plan, and a released capability.

CHECK THE GAPS

1. feature request / 2. problem statement / 3. audit trail / 4. saved view / 5. acceptance criteria / 6. use case / 7. impact statement / 8. product backlog / 9. Prioritization / 10. feedback loop

[Why these answers fit, page 155](#)

F Check accuracy and scope

Discover the workflow behind the requested button

Return to the case

Customer operations lead Nia requests a bulk-approval button. Twenty approvers handle about 200 requests weekly; around 40 need individual exception review. Staff report repeated navigation between similar requests. The customer requires a separate authorized decision record for each request. The current product offers a saved filtered view but no confirmed bulk-approval capability. Success manager Teo must clarify the repeated work and pass the need to product manager Arun. Logging the request does not assign delivery priority or a release date. Any interim approach must preserve the decision-record requirement.

Choose one answer per question. Use the case facts and keep any uncertainty or limits intact.

1. What should the product handoff include?

- A. The workflow, frequency, impact, constraints, and representative approved examples
- B. A count of requests for the button, without the individual-decision constraint
- C. A proposed interface design, without the navigation sequence users follow
- D. A time-saving estimate that excludes the forty exception cases without explanation

2. Which customer update correctly describes backlog status?

- A. Backlog entry guarantees delivery this month.
- B. Logging the request completes acceptance testing.
- C. A roadmap discussion means the feature is already available.
- D. The request is recorded for assessment; priority and delivery timing are not confirmed.

[Answers and explanations, page 157](#)

Listen for the distinction

Check all ten gaps. Reread the forty exceptions and the requirement for an authorized decision on every request.

Respect the proposed solution while exploring the problem

A customer may name a feature because it is the clearest way to express frustration. Do not dismiss the idea as merely a request. Ask for the relevant sequence and obstacle, then confirm the problem in words the customer recognizes before discussing alternative approaches.

F Say it / transfer to a new case

Clarify another requested feature

A customer requests one-click batch closure for service tickets. The reported problem is repeated navigation. Each ticket must retain an authorized closure record. A saved queue view exists, but batch closure has not been confirmed or scheduled.

Complete the four gaps. With a partner, read alternate roles, then switch. Studying alone, read both roles and pause before each response.

WORD AND PHRASE BANK

not scheduled / saved queue view / repeated navigation / authorized closure record

- 01 **Customer:** The reported obstacle is ¹ _____.
- 02 **Manager:** Each ticket must retain an ² _____.
- 03 **Customer:** The existing capability is a ³ _____.
- 04 **Manager:** The release status for batch closure is ⁴ _____.

CHECK THE GAPS

1. repeated navigation / 2. authorized closure record / 3. saved queue view / 4. not scheduled

[Why these answers fit, page 157](#)

F Say it / transfer to a new case / continued

Rebuild the exchange

Choose the missing response. Read the completed three-turn exchange aloud, changing roles on the second reading.

1. Rebuild the exchange from "Discover the workflow behind the requested button". Nia: "Please make the navigation problem clear in your note. We are trying to avoid repeated clicks, not asking you to remove the individual review." Teo: [missing response] Nia: "Once the request is logged, does that mean it is in the next release? I need to explain the status internally." Which response belongs in the gap?

- A.** No. A product backlog entry records potential work. Product still needs to assess the need, alternatives, effort, and wider priorities. I do not have an approved release date to share.
- B.** Yes. Prioritization considers more than submission order. I can explain the assessment status and the evidence we supplied, but I cannot promise a ranking before that decision is made.
- C.** I will include that in the impact statement. I will send the workflow, frequency, constraints, and examples to Arun, then confirm that the summary represents what you actually need.
- D.** Then the problem statement should name that repeated navigation. We should also preserve the distinction between similar requests and exceptions rather than assume all two hundred can be handled identically.

[Answers and explanations, page 158](#)

A Read the situation

LESSON 08 / DIFFICULT CUSTOMERS AND BOUNDARY SETTING

Acknowledge impact, reconcile disputed records, and set a respectful boundary while keeping support available.

Repair the expectation without promising a date you cannot confirm

Customer lead Beth says an export feature was promised for October and demands confirmation of 31 October. The available 17 September note says the team is targeting late October, subject to testing; it does not record a confirmed release date. Success manager Idris must check any additional evidence rather than deny that other conversations occurred. He can arrange a manager review and provide a status update by 15:00 UTC on Thursday. He cannot approve compensation or promise delivery. Company procedure allows a pause after a clear boundary if personal insults continue, while preserving an appropriate support route.

People: Beth, Customer team lead; Idris, Customer success manager.

Read the record

Choose one answer per question using the facts above.

1. What does the available 17 September note say?

- A. Late October is a target subject to testing.
- B. The feature is already released.
- C. 31 October is an unconditional confirmed date.
- D. Compensation has been approved.

2. What can Idris commit to?

- A. A status update by Thursday at 15:00 UTC
- B. Delivery by 31 October
- C. An immediate financial credit
- D. A finding that no other promise could have occurred

3. What should happen if other evidence exists?

- A. Ignore it because the available note is enough to settle every issue.
- B. Alter the original note to match the new account.
- C. Treat it as automatic permission for Idris to approve compensation.
- D. Preserve and review it through the appropriate process.

[Answers and explanations, page 159](#)

B Vocabulary in use

CORE TERMS

expectation gap

A difference between what someone expected and what is currently understood or available.

address the expectation gap

confirmed commitment

An undertaking established through the relevant authorized process.

verify a confirmed commitment

delivery status

The current state of work toward making a capability available.

verify delivery status

contemporaneous note

A note made at or near the time of the relevant event.

preserve contemporaneous notes

acknowledgment

Recognition of a concern or impact without necessarily accepting every claim.

give a clear acknowledgment

complaint escalation

Routing a complaint to the appropriate reviewer or authority.

arrange complaint escalation

conditional estimate

A forecast dependent on stated assumptions or events.

explain a conditional estimate

qualification

Wording that limits or conditions a statement.

preserve the qualification

disputed record

Information whose meaning, completeness, or accuracy is challenged.

reconcile a disputed record

supporting evidence

Information that helps assess a claim or account.

request supporting evidence

service recovery

Work to address a service problem and rebuild trust.

coordinate service recovery

review owner

The person responsible for coordinating an assessment.

identify the review owner

Say it in context

Stress the highlighted expression. Keep the surrounding words connected; pause at the end of the phrase.

expectation gap EXPECTATION GAP

address the expectation gap

Keep the meaning precise: A difference between what someone expected and what is currently understood or available.

disputed record DISPUTED RECORD

reconcile a disputed record

Keep the meaning precise: Information whose meaning, completeness, or accuracy is challenged.

B Precision and professional shorthand

EXTEND YOUR RANGE

compensation request

A request for money, credit, or another remedy.
route a compensation request

resolution path

The route for assessing and addressing an issue.
explain the resolution path

personal insult

A demeaning remark directed at a person rather than the work or issue.
address personal insults

pause

A temporary interruption with its purpose and next route clarified.
explain a call pause

factual chronology

A time-ordered account of events and evidence.
compile a factual chronology

follow-through

Completing and communicating agreed actions.
demonstrate follow-through

commercial authority

Permission to make specified business decisions or commitments.
confirm commercial authority

boundary

A stated limit on conduct or participation.
set a respectful boundary

de-escalation

Communication aimed at reducing tension while addressing the issue.
use de-escalation language

continuity of support

Maintaining an appropriate way to receive assistance.
preserve continuity of support

read-back

Repeating key points so another person can confirm or correct them.
give a closing read-back

trust repair

Rebuilding confidence through accurate communication and reliable action.
support trust repair

Say it in context

Stress the highlighted expression. Keep the surrounding words connected; pause at the end of the phrase.

review owner REVIEW OWNER

identify the review owner

Keep the meaning precise: The person responsible for coordinating an assessment.

personal insult PERSONAL INSULT

address personal insults

Keep the meaning precise: A demeaning remark directed at a person rather than the work or issue.

Phrases that move the work forward

Acknowledge the effect

I understand that your team planned around an October expectation.

State the available wording

The note says late October, subject to testing.

Avoid a blanket denial

I am not saying that no other conversation occurred.

Take ownership of review

I will arrange the manager review and preserve the records you provide.

Avoid promising the result

That update may report that the review is still pending.

Accept direct criticism

You can challenge our handling of the issue.

Explain a possible pause

If the personal insults continue, we will pause this call and use the agreed support route.

Confirm the read-back

Your concern is the missed expectation, the operational impact, and the requested review.

Invite the evidence

Please share the message or meeting record you relied on.

Keep the record qualified

I have not yet reviewed every relevant communication.

Separate the date

I cannot confirm the thirty-first of October from the information available.

Set the next update

I will update you by Thursday at fifteen hundred UTC.

Route the remedy request

I can record your compensation request, but I cannot approve it.

Name the conduct boundary

I want to continue helping; please keep comments focused on the issue rather than personal insults.

Keep support available

The complaint will remain open through that route.

Close with follow-through

I will send the factual summary, the review owner, and the promised update time.

Precision in real exchanges

Purpose: Keep the record qualified

Useful wording: I have not yet reviewed every relevant communication.

Purpose: Avoid a blanket denial

Useful wording: I am not saying that no other conversation occurred.

D Choose the response that fits

Choose one response for each situation. Preserve the facts, the decision boundary, and the purpose of the exchange.

1. Which response addresses the disputed promise accurately?

- A.** The available note is conditional; let us review any other records you relied on.
- B.** No other promise could possibly have been made.
- C.** An estimate automatically becomes a confirmed release date.
- D.** The customer's frustration proves delivery was guaranteed.

2. Which statement preserves a useful communication commitment?

- A.** I will respond only after the customer stops disagreeing.
- B.** The meeting time itself confirms a favorable decision.
- C.** I will update you by Thursday at 15:00 UTC, even if review is still pending.
- D.** I guarantee the requested feature and compensation by that time.

3. A colleague needs the term for this meaning: Wording that limits or conditions a statement. Which term fits?

- A.** factual chronology
- B.** resolution path
- C.** qualification
- D.** acknowledgment

D Choose the response that fits / continued

4. Rebuild the exchange from "Repair the expectation without promising a date you cannot confirm". Beth: "I may have a presentation from the earlier meeting. I will send it through the customer support channel." Idris: [missing response] Beth: "We have spent time preparing for this. I also want a credit, not just another explanation of your process." Which response belongs in the gap?

- A.** I will not. The available note records a conditional estimate for late October, subject to testing. That is different from a confirmed date, but it does not establish that no other conversation or document exists.
- B.** Please do. We will preserve that supporting evidence alongside the note and review the full context. I do not want either of us to rely on a selective quotation or an incomplete sequence.
- C.** You can challenge our handling. I will arrange a complaint escalation to a manager and identify who owns the review. I remain responsible for making sure you receive the update I promise.
- D.** I will confirm the review owner and update you by Thursday at fifteen hundred UTC. That update may say the assessment is still pending, but I will not leave you waiting without the promised contact.

[Answers and explanations, page 159](#)

One useful distinction

Targeting late October, subject to testing is conditional wording. It does not establish the requested 31 October commitment in the available note. That distinction does not prove that no other conversation or document exists, or determine any contractual remedy.

E Conversation

Repair the expectation without promising a date you cannot confirm

Repair the expectation without promising a date you cannot confirm

Complete the numbered gaps. Use each bank entry once; some entries contain several words.

WORD AND PHRASE BANK

Trust repair / review owner / complaint escalation / read-back / expectation gap / supporting evidence / conditional estimate / resolution path / boundary / compensation request

- 01 **Beth:** We planned our work around an October release. Now the date sounds uncertain. Can you confirm October thirty-first, or tell me exactly what has changed?
- 02 **Idris:** I understand the ¹ _____ and the disruption. I cannot confirm that date, but I want to review exactly what your team was told.
- 03 **Beth:** The discussion was much more definite than that. I do not want you to use one note to dismiss everything we heard.
- 04 **Idris:** I will not. The available note records a ² _____ for late October, subject to testing. That is different from a confirmed date, but it does not establish that no other conversation or document exists.
- 05 **Beth:** I may have a presentation from the earlier meeting. I will send it through the customer support channel.
- 06 **Idris:** Please do. We will preserve that ³ _____ alongside the note and review the full context. I do not want either of us to rely on a selective quotation or an incomplete sequence.

E Conversation / continued

- 07 **Beth:** We have spent time preparing for this. I also want a credit, not just another explanation of your process.
- 08 **Idris:** I can record the ⁴ _____ and its basis for the authorized reviewer. I cannot approve a credit or promise the result, but your reported impact belongs in the review.
- 09 **Beth:** This is infuriating. Your team has handled it badly, and I want someone senior to take responsibility.
- 10 **Idris:** You can challenge our handling. I will arrange a ⁵ _____ to a manager and identify who owns the review. I remain responsible for making sure you receive the update I promise.

Conversation continues on the next page.

Repair the expectation without promising a date you cannot confirm

CONVERSATION / CONTINUED

- 11 **Beth:** You are useless if all you can do is repeat that you cannot commit. Why should I keep talking to you?
- 12 **Idris:** I want to continue helping, and I need to set a ⁶ _____ here: please keep comments focused on the issue rather than personal insults. We can discuss the impact, the records, and the review without directing remarks at each other.
- 13 **Beth:** Fine. My concern is that nobody has taken ownership. What will actually happen next, and when will I hear from you?
- 14 **Idris:** I will confirm the ⁷ _____ and update you by Thursday at fifteen hundred UTC. That update may say the assessment is still pending, but I will not leave you waiting without the promised contact.
- 15 **Beth:** A status update is fine, as long as the complaint stays open. We still need an answer on the date and the preparation costs we incurred.
- 16 **Idris:** Agreed. The ⁸ _____ remains open. If personal insults resume, our procedure allows a pause with a clear continuing support route, not deletion of the complaint or abandonment of the review.
- 17 **Beth:** Then summarize what you have understood so I can correct anything before the manager sees it.

Repair the expectation without promising a date you cannot confirm / continued

- 18 **Idris:** Here is the ⁹ _____: your team relied on an October expectation, incurred preparation effort, and wants the communication history, delivery status, and credit request reviewed. The available note is conditional, and you may provide another record.
- 19 **Beth:** That captures it. I will send the presentation, and I expect the Thursday update even if the answer is not final.
- 20 **Idris:** You will receive it. ¹⁰ _____ starts with follow-through. I will send the summary, confirm the owner, and keep the agreed contact time.

CHECK THE GAPS

1. expectation gap / 2. conditional estimate / 3. supporting evidence / 4. compensation request / 5. complaint escalation / 6. boundary / 7. review owner / 8. resolution path / 9. read-back / 10. Trust repair

[Why these answers fit, page 160](#)

F Check accuracy and scope

Repair the expectation without promising a date you cannot confirm

Return to the case

Customer lead Beth says an export feature was promised for October and demands confirmation of 31 October. The available 17 September note says the team is targeting late October, subject to testing; it does not record a confirmed release date. Success manager Idris must check any additional evidence rather than deny that other conversations occurred. He can arrange a manager review and provide a status update by 15:00 UTC on Thursday. He cannot approve compensation or promise delivery. Company procedure allows a pause after a clear boundary if personal insults continue, while preserving an appropriate support route.

Choose one answer per question. Use the case facts and keep any uncertainty or limits intact.

1. Which behavior alone does not justify treating the customer as abusive?

- A. Repeated personal insults after a clear boundary
- B. Demeaning comments directed at the employee
- C. Continuing personal attacks instead of discussing the issue
- D. Firmly disputing the record and requesting accountability

2. If the stated procedure requires a pause, what should Idris preserve?

- A. A clear support route, complaint record, owner, and next contact
- B. A threat to erase the complaint
- C. An unapproved credit in exchange for silence
- D. A claim that the original concern is now invalid

[Answers and explanations, page 162](#)

Listen for the distinction

Correct the ten gaps. Reread the request for other records, compensation referral, and boundary on personal insults.

Firm dissatisfaction is not automatically abuse

A customer can dispute the record, demand accountability, or speak directly without crossing a conduct boundary. Respond to the substance first. If comments become personal, name the behavior calmly and offer a way to continue the work; do not use a boundary to avoid a legitimate complaint.

F Say it / transfer to a new case

Respond to another disputed delivery expectation

A note describes a November target subject to testing. Customer Dena requests a confirmed 30 November date and a credit. Manager Vik cannot approve either. He can route additional evidence for review and update Dena on Tuesday at 09:00 UTC.

Complete the four gaps. With a partner, read alternate roles, then switch. Studying alone, read both roles and pause before each response.

WORD AND PHRASE BANK

credit / review / conditional target / 09:00 UTC

- 01 **Manager:** The documented timing is a ¹ _____.
- 02 **Customer:** My additional messages should be sent for ² _____.
- 03 **Manager:** I cannot approve the requested ³ _____.
- 04 **Customer:** The next status update is Tuesday at ⁴ _____.

CHECK THE GAPS

1. conditional target / 2. review / 3. credit / 4. 09:00 UTC

[Why these answers fit, page 162](#)

F Say it / transfer to a new case / continued

Rebuild the exchange

Choose the missing response. Read the completed three-turn exchange aloud, changing roles on the second reading.

1. Rebuild the exchange from "Repair the expectation without promising a date you cannot confirm". Beth: "Fine. My concern is that nobody has taken ownership. What will actually happen next, and when will I hear from you?" Idris: [missing response] Beth: "A status update is fine, as long as the complaint stays open. We still need an answer on the date and the preparation costs we incurred." Which response belongs in the gap?

- A.** I will not. The available note records a conditional estimate for late October, subject to testing. That is different from a confirmed date, but it does not establish that no other conversation or document exists.
- B.** Please do. We will preserve that supporting evidence alongside the note and review the full context. I do not want either of us to rely on a selective quotation or an incomplete sequence.
- C.** Here is the read-back: your team relied on an October expectation, incurred preparation effort, and wants the communication history, delivery status, and credit request reviewed. The available note is conditional, and you may provide another record.
- D.** I will confirm the review owner and update you by Thursday at fifteen hundred UTC. That update may say the assessment is still pending, but I will not leave you waiting without the promised contact.

[Answers and explanations, page 163](#)

Review 4 / Meaning and context

Use language from the lessons you have completed. Choose one answer per question.

Case file

Revisit "Product Feedback and Feature Requests" and "Difficult Customers and Boundary Setting". Choose precise terminology, then reconstruct the missing responses using both neighboring turns. The final two questions also revisit earlier conversations.

1. A colleague needs the term for this meaning: A specific situation in which a capability would be used. Which term fits?

- A. use case
- B. acceptance criteria
- C. prioritization
- D. audit trail

2. A colleague needs the term for this meaning: Information that helps assess a claim or account. Which term fits?

- A. expectation gap
- B. compensation request
- C. pause
- D. supporting evidence

3. Rebuild the exchange from "Check the existing capacity before selling more seats". Nora: "The new team has not confirmed who will attend training. Their manager asked for access before discussing the practical schedule." Sam: [missing response] Nora: "I can ask the manager. Would you still be willing to quote more seats if our existing rights do not cover that team?" Which response belongs in the gap?

- A. Correct. These are named-user licenses. Follow the approved identity and access arrangement; do not use shared credentials as a shortcut around the actual license or security requirements.
- B. Then include that in the fit assessment. More seats do not solve a workflow mismatch by themselves. We should check capability and configuration alongside the training plan.
- C. That is a readiness gap separate from license quantity. Who will own their preparation, and when can the relevant users practice the workflow they actually need?
- D. Correct, subject to that approved allocation. Twenty-five taken from thirty leaves five. It would not increase the total from eighty to one hundred five.

Review 4 / Meaning and context / continued

4. Rebuild the exchange from "Repair the expectation without promising a date you cannot confirm". Beth: "Then summarize what you have understood so I can correct anything before the manager sees it." Idris: [missing response] Beth: "That captures it. I will send the presentation, and I expect the Thursday update even if the answer is not final." Which response belongs in the gap?

- A.** I will confirm the review owner and update you by Thursday at fifteen hundred UTC. That update may say the assessment is still pending, but I will not leave you waiting without the promised contact.
- B.** Here is the read-back: your team relied on an October expectation, incurred preparation effort, and wants the communication history, delivery status, and credit request reviewed. The available note is conditional, and you may provide another record.
- C.** I will not. The available note records a conditional estimate for late October, subject to testing. That is different from a confirmed date, but it does not establish that no other conversation or document exists.
- D.** Please do. We will preserve that supporting evidence alongside the note and review the full context. I do not want either of us to rely on a selective quotation or an incomplete sequence.

[Answers and explanations, page 173](#)

Language for the next case

Growth can hide lost customers

starting cohort

The starting cohort is the ten accounts present at the beginning, with 100,000 annual recurring revenue; newly acquired accounts are outside this retention population.

Malik: Start with the starting cohort: ten accounts and one hundred thousand in annual recurring revenue. The three new accounts belong in the total revenue bridge, not in the retention numerator.

gross revenue retention

Gross revenue retention excludes expansion: (100,000 minus 20,000 churn minus 10,000 contraction) divided by 100,000 equals 70%.

Malik: So gross revenue retention is seventy percent. It shows how much starting recurring revenue remains before the existing customers' additional spending is included.

new-logo revenue

New-logo revenue is the 30,000 annual recurring revenue from three newly acquired accounts; it contributes to ending total ARR but not retention of the original cohort.

Malik: Show it as new-logo revenue. Add it after the one-hundred-fifty-thousand cohort result to reach one hundred thirty-five thousand in total ending ARR.

Logo retention

Logo retention measures how many starting customer accounts remain; eight of the original ten is 80%, not eleven divided by ten after including new customers.

Malik: Correct. Logo retention counts retained customer accounts. The ending account count tells a different story and does not turn retention into one hundred ten percent.

net revenue retention

Net revenue retention includes the original cohort's expansion: (100,000 minus 20,000 minus 10,000 plus 35,000) divided by 100,000 equals 105%; new customers are excluded.

Malik: That makes net revenue retention one hundred five percent. The measure can exceed one hundred because expansion within retained accounts can outweigh churn and contraction.

revenue bridge

The revenue bridge reconciles starting and ending recurring revenue through separate churn, contraction, expansion, and new-customer movements on a consistent basis.

Malik: Right. Keep the revenue bridge labeled: starting amount, churn, contraction, expansion, and new business. That lets people follow the calculation rather than guess what a percentage includes.

Read the phrases aloud. Then complete the conversation on the following pages using the word bank.

Conversation

Growth can hide lost customers

Fictional annual recurring revenue bridge: ten starting accounts, \$100,000 starting ARR. Two accounts leave, losing \$20,000; remaining accounts contract \$10,000 and expand \$35,000. Three new accounts add \$30,000. No other changes, reactivations, or currency effects occur. Retention measures use the original ten-account cohort; all figures use the same annualized basis.

Complete the numbered gaps. Use each bank entry once; some entries contain several words.

WORD AND PHRASE BANK

starting cohort / net revenue retention / gross revenue retention / new-logo revenue / revenue bridge / Logo retention

- 01 **Inez:** The total recurring-revenue line is up, but we lost two customers. I want the review to explain both facts rather than use growth as a synonym for retention.
- 02 **Malik:** Start with the ¹ _____: ten accounts and one hundred thousand in annual recurring revenue. The three new accounts belong in the total revenue bridge, not in the retention numerator.
- 03 **Inez:** Two of those ten left, so eight remain. That makes account retention eighty percent, even though we finish with eleven accounts after adding three new ones.
- 04 **Malik:** Correct. ² _____ counts retained customer accounts. The ending account count tells a different story and does not turn retention into one hundred ten percent.
- 05 **Inez:** Now take out the twenty thousand from the two departures and ten thousand of contraction. That leaves seventy thousand before expansion.
- 06 **Malik:** So ³ _____ is seventy percent. It shows how much starting recurring revenue remains before the existing customers' additional spending is included.

Conversation / continued

- 07 **Inez:** The remaining accounts expanded by thirty-five thousand. Adding that to seventy gives one hundred five thousand from the original cohort at the end.
- 08 **Malik:** That makes ⁴ _____ one hundred five percent. The measure can exceed one hundred because expansion within retained accounts can outweigh churn and contraction.
- 09 **Inez:** But it does not mean we retained every customer or every dollar before expansion. The eighty-percent account figure and seventy-percent gross figure still matter.
- 10 **Malik:** Exactly. A strong net number can coexist with losses. We should show the components so an expansion in one account does not make another customer's departure disappear.

Conversation continues on the next page.

Growth can hide lost customers

CONVERSATION / CONTINUED

- 11 **Inez:** The three new accounts contribute thirty thousand. Where does that sit in the full revenue report without contaminating the retention calculation?
- 12 **Malik:** Show it as ⁵ _____. Add it after the one-hundred-five-thousand cohort result to reach one hundred thirty-five thousand in total ending ARR.
- 13 **Inez:** The overall ARR growth is therefore thirty-five percent on the one-hundred-thousand starting base. It is not a net retention rate of one hundred thirty-five percent.
- 14 **Malik:** Right. Keep the ⁶ _____ labeled: starting amount, churn, contraction, expansion, and new business. That lets people follow the calculation rather than guess what a percentage includes.
- 15 **Inez:** For the two departures, we need the actual reasons and timing. I do not want a generic poor-adoption label unless the account evidence supports it.
- 16 **Malik:** We can attach the documented reasons and identify unknowns. The arithmetic shows what changed; it does not diagnose the cause of every customer decision.
- 17 **Inez:** And the contracted accounts still exist. We must not count their ten-thousand reduction as another lost logo simply because recurring value fell.
- 18 **Malik:** Correct. Logo loss and contraction are different movements. We should reconcile the account-level records to the totals and keep the original cohort fixed for this period.
- 19 **Inez:** I will present eighty-percent logo retention, seventy-percent gross retention, one-hundred-five-percent net retention, and one hundred thirty-five thousand ending ARR as four distinct results.
- 20 **Malik:** That gives the team a useful review. We can celebrate expansion and acquisition while still addressing the two departures and the reduced spending within continuing accounts.

CHECK THE GAPS

1. starting cohort / 2. Logo retention / 3. gross revenue retention / 4. net revenue retention / 5. new-logo revenue / 6. revenue bridge

[Why these answers fit, page 176](#)

Keep acquisition out of retention

A starting cohort has 20 accounts and \$200,000 ARR. Four accounts leave, losing \$30,000; contraction is \$10,000 and expansion is \$20,000. New customers add \$50,000. No other changes occur; all amounts use the same annualized basis.

Complete the exchange using each phrase once. Read both roles, then switch roles and repeat with the bank covered.

WORD AND PHRASE BANK

80 / 160 / 90 / 230

- 01 **Director:** Retention of the original accounts is ¹ _____ percent.
- 02 **Analyst:** Retained ARR before expansion is \$² _____ thousand.
- 03 **Director:** Net revenue retention is ³ _____ percent.
- 04 **Analyst:** Including new customers, ending ARR is \$⁴ _____ thousand.

CHECK THE GAPS

1. 80 / 2. 160 / 3. 90 / 4. 230

[Why these answers fit, page 176](#)

Keep the distinction audible

Reconcile customer retention and recurring-revenue retention using the same starting cohort.

Language for the next case

The part-year seat charge

co-termination

Co-termination aligns the added seats' end date with the existing subscription, here 31 December, rather than creating a new twelve-month term from 1 October.

Marco: The addition uses co-termination. The new seats end on December thirty-first with the existing hundred, so this quote covers October, November, and December only.

discount scope

The discount scope is limited to the three-month addition; ten percent of 900 is 90, leaving 810 before tax, with existing charges unchanged.

Marco: The discount scope is the three-month addition only. Ninety dollars comes off nine hundred, leaving eight hundred ten before tax. It does not create a credit against existing seats.

renewal illustration

The renewal illustration is a conditional comparison, not an approved renewal: 115 seats times 20 dollars times 12 months equals 27,600 before tax with no assumed discount.

Marco: Yes, as a renewal illustration. At twenty dollars per seat per month for twelve months, without a discount, that would be twenty-seven thousand six hundred before tax.

proration basis

The proration basis in this fictional quote is whole months: 15 seats times 20 dollars times three months equals 900 before discount; other systems or contracts may use different timing rules.

Marco: Correct. The stipulated proration basis uses whole months, not days or seconds. That is the rule supplied by this quote.

service period

The service period is 1 October through 31 December for all fifteen added seats; the discounted charge does not shorten that stated period or renew it automatically in this exercise.

Marco: Exactly. The service period covers all three months. The approved quote should show the quantity, unit rate, period, discount, and resulting amount on the same basis.

renewal discount

A renewal discount would require its own applicable approval and terms; the limited discount on the current three-month addition cannot be silently carried into the next twelve-month term.

Marco: Not as an agreed term. The current approval covers only this addition. Any renewal discount is separate. The illustration we just calculated explicitly assumes none.

Read the phrases aloud. Then complete the conversation on the following pages using the word bank.

Conversation

The part-year seat charge

Fictional quote: 100 existing seats end 31 December. Add 15 for October-December at \$20/seat/month, whole-month billing, 10% discount on this addition only. Existing charges unchanged; no setup fee; tax excluded. Next-year illustration: 115 seats, 12 months, same rate, no discount; renewal unapproved.

Complete the numbered gaps. Use each bank entry once; some entries contain several words.

WORD AND PHRASE BANK

proration basis / renewal illustration / service period / discount scope / renewal discount
/ co-termination

- 01 **Suki:** I expected another annual charge for the fifteen seats, but your quote is much smaller. Can you explain the dates before I send it to finance?
- 02 **Marco:** The addition uses ¹ _____. The new seats end on December thirty-first with the existing hundred, so this quote covers October, November, and December only.
- 03 **Suki:** Then it is fifteen seats at twenty dollars for three whole months. That is nine hundred dollars before the quoted discount, not thirty-six hundred for a year.
- 04 **Marco:** Correct. The stipulated ² _____ uses whole months, not days or seconds. That is the rule supplied by this quote.
- 05 **Suki:** The discount is ten percent. Is that ten percent off our entire subscription, or just the new-seat charge on this quote?
- 06 **Marco:** The ³ _____ is the three-month addition only. Ninety dollars comes off nine hundred, leaving eight hundred ten before tax. It does not create a credit against existing seats.

Conversation / continued

- 07 **Suki:** The account would then have one hundred fifteen seats until December thirty-first. The smaller invoice does not mean the extra seats disappear after one month.
- 08 **Marco:** Exactly. The ⁴ _____ covers all three months. The approved quote should show the quantity, unit rate, period, discount, and resulting amount on the same basis.
- 09 **Suki:** Could you also show finance what a full next year would look like if we kept all one hundred fifteen at the same rate?
- 10 **Marco:** Yes, as a ⁵ _____. At twenty dollars per seat per month for twelve months, without a discount, that would be twenty-seven thousand six hundred before tax.

Conversation continues on the next page.

The part-year seat charge

CONVERSATION / CONTINUED

- 11 **Suki:** That is much more than eight hundred ten, but they are different scopes. One is fifteen extra seats for a quarter; the other is all one hundred fifteen for a year.
- 12 **Marco:** Right. We should not present that as a price increase derived by comparing the two totals. Both the seat count and the duration have changed.
- 13 **Suki:** May I carry the ten-percent discount into next year's budget? It would be convenient to use the same assumption for the renewal.
- 14 **Marco:** Not as an agreed term. The current approval covers only this addition. Any ⁶ _____ is separate. The illustration we just calculated explicitly assumes none.
- 15 **Suki:** And tax is still outside both figures. I should not describe either amount as the final tax-inclusive payment due.
- 16 **Marco:** Correct. Billing can confirm the applicable tax treatment on the actual invoice. The supplied comparison is pre-tax and includes no setup charge.
- 17 **Suki:** I will send finance the approved addition and the clearly labeled renewal illustration separately. The latter should not look like an order we have already accepted.
- 18 **Marco:** That is the right distinction. Check the customer's purchasing route for the addition and leave next year's quantity and terms subject to the renewal decision.
- 19 **Suki:** Let me read it back: fifteen added seats, three months, nine hundred before discount, ninety discount, eight hundred ten before tax, ending December thirty-first.
- 20 **Marco:** Correct. The separate full-year illustration is one hundred fifteen seats at the stated rate, totaling twenty-seven thousand six hundred before tax, without an approved renewal or carried-over discount.

CHECK THE GAPS

1. co-termination / 2. proration basis / 3. discount scope / 4. service period / 5. renewal illustration / 6. renewal discount

[Why these answers fit, page 178](#)

Calculate another co-terminated addition

A fictional quote adds 12 seats for four whole months at \$25 per seat per month. A 15% discount applies only to that addition. No setup fee; tax excluded. The added seats end on the existing subscription's end date.

Complete the exchange using each phrase once. Read both roles, then switch roles and repeat with the bank covered.

WORD AND PHRASE BANK

180 / 1,020 / 1,200 / co-termination

- 01 **Customer:** Before discount, the addition costs \$¹ _____.
- 02 **Manager:** The discount amount is \$² _____.
- 03 **Customer:** The resulting pre-tax amount is \$³ _____.
- 04 **Manager:** The shared end date is called ⁴ _____.

CHECK THE GAPS

1. 1,200 / 2. 180 / 3. 1,020 / 4. co-termination

[Why these answers fit, page 178](#)

Keep the distinction audible

Read back a co-terminated seat addition with an explicit period, discount scope, and separate renewal illustration.

Language for the next case

Help a departing customer leave well

offboarding plan

The offboarding plan coordinates the agreed exit, including owners, export checks, access timing, and required follow-up; assistance is not made conditional on another retention discussion.

Ellis: Yes. The offboarding plan should help you complete that transition. I will not make export assistance depend on reopening the commercial decision.

record identifier

The record identifier links each exported attachment to its related record; preserving and checking that relationship is necessary for a usable handover, not merely a successful download.

Ellis: Check the record identifier mapping using the approved export guide. Your administrator should test the links and a suitable sample of files, not just confirm that a download finished.

access extension

An access extension changes the agreed availability period and requires approval; opening a support ticket does not automatically extend the 31 October, 18:00 UTC cutoff.

Ellis: No. An access extension requires approval. Raise any likely delay now so we can assess it, but keep the existing cutoff in the plan until it changes formally.

export scope

Export scope defines which data and file types are included; the records file alone is incomplete because attachments require a separate export in this fictional service.

Ellis: That is an export scope gap. Records and attachments use separate files here. A matching row count does not establish that every required attachment has been retrieved.

authorized recipient

An authorized recipient is a person or party cleared to receive the specified data through approved arrangements; credential sharing does not establish that authorization or provide an acceptable transfer route.

Ellis: No. Use the authorized recipient and access arrangements your team has approved. We can coordinate the permitted route without sharing an individual's credentials.

deletion confirmation

Deletion confirmation must describe the verified scope and status under the applicable agreement and law, including any relevant backup or retention treatment; access ending alone proves none of those actions.

Ellis: I cannot promise that. The deletion confirmation must come through the authorized process and state what was completed, what remains, and any applicable retention basis.

Read the phrases aloud. Then complete the conversation on the following pages using the word bank.

Conversation

Help a departing customer leave well

Fictional exit: access ends 31 October, 18:00 UTC; extensions need approval. An authorized administrator must retrieve and check separate records and attachment exports beforehand. Deletion and backups require specialist confirmation under the applicable agreement. The customer has declined another retention meeting.

Complete the numbered gaps. Use each bank entry once; some entries contain several words.

WORD AND PHRASE BANK

access extension / export scope / authorized recipient / offboarding plan / record identifier
/ deletion confirmation

- 01 **Dana:** We have decided to move, and I have declined another renewal meeting. Can we focus this call on getting our records and attachments out before access ends?
- 02 **Ellis:** Yes. The ¹ _____ should help you complete that transition. I will not make export assistance depend on reopening the commercial decision.
- 03 **Dana:** Our administrator downloaded a records file yesterday. The row count matches the account total, so someone marked the export complete. I do not see the attachments.
- 04 **Ellis:** That is an ² _____ gap. Records and attachments use separate files here. A matching row count does not establish that every required attachment has been retrieved.
- 05 **Dana:** We need both, and we need to know which attachment belongs to which record. Otherwise the receiving team will have a folder of files it cannot use.
- 06 **Ellis:** Check the ³ _____ mapping using the approved export guide. Your administrator should test the links and a suitable sample of files, not just confirm that a download finished.

Conversation / continued

- 07 **Dana:** Our migration provider offered to collect the files. Can I forward my administrator's password so they can do it without waiting for another account?
- 08 **Ellis:** No. Use the ⁴ _____ and access arrangements your team has approved. We can coordinate the permitted route without sharing an individual's credentials.
- 09 **Dana:** The cutoff is October thirty-first at eighteen hundred UTC. Does submitting a support ticket automatically keep the account open after that time?
- 10 **Ellis:** No. An ⁵ _____ requires approval. Raise any likely delay now so we can assess it, but keep the existing cutoff in the plan until it changes formally.

Conversation continues on the next page.

Help a departing customer leave well

CONVERSATION / CONTINUED

- 11 **Dana:** Once the files are received, I will ask our administrator to confirm the contents and report missing items. We should do that while there is still time to resolve a problem.
- 12 **Ellis:** Agreed. Record the file versions, receipt, and validation results. Receipt alone is not acceptance that the handover is complete, especially if the attachments have not been checked.
- 13 **Dana:** Does access ending also mean every copy of our data disappears instantly from your systems and backups? Our director wants a clear statement for the exit record.
- 14 **Ellis:** I cannot promise that. The ⁶ _____ must come through the authorized process and state what was completed, what remains, and any applicable retention basis.
- 15 **Dana:** Then please keep export, access closure, and deletion as separate items. I do not want a closed support ticket used as evidence for all three.
- 16 **Ellis:** I will. The specialist team will confirm the applicable handling and timing, including backups and any lawful retention requirement. I will not invent a universal deletion period for this conversation.
- 17 **Dana:** We also have an integration that sends records nightly. Our technical owner needs to know when it must stop and how the receiving system will take over.
- 18 **Ellis:** Include that dependency in the exit plan with the technical owners. Confirm the agreed cutoff and replacement process; do not leave an unattended integration sending data into a closed service.
- 19 **Dana:** The next steps are the separate attachment export, relationship checks, authorized receipt, and confirmation of the closure and deletion processes. No further retention pitch is needed.
- 20 **Ellis:** Understood. I will send the plan and owners, keep the stated access deadline visible, and track unresolved items through the agreed support route until the defined handover is complete.

CHECK THE GAPS

1. offboarding plan / 2. export scope / 3. record identifier / 4. authorized recipient / 5. access extension / 6. deletion confirmation

[Why these answers fit, page 180](#)

Check another customer exit

An agreed exit requires separate records and attachment exports before 20 June at 16:00 UTC. The records file is received, but attachments are missing. A support ticket is open; no access extension is approved. Deletion status has not been confirmed.

Complete the exchange using each phrase once. Read both roles, then switch roles and repeat with the bank covered.

WORD AND PHRASE BANK

16:00 / unconfirmed / attachments / extension

- 01 **Customer:** The missing export contains ¹ _____.
- 02 **Manager:** Access still ends at ² _____ UTC on 20 June.
- 03 **Customer:** Opening a ticket does not approve an access ³ _____.
- 04 **Manager:** Deletion status remains ⁴ _____.

CHECK THE GAPS

1. attachments / 2. 16:00 / 3. extension / 4. unconfirmed

[Why these answers fit, page 180](#)

Keep the distinction audible

Confirm export scope, verify receipt, and separate ending access from data deletion without obstructing a customer exit.

01 / Answers and explanations

A / Read the situation

A1. What is the status of the Friday launch?

A. A target whose readiness conditions are not yet confirmed

The target remains conditional because required tasks and people are not yet confirmed.

[Return to the exercise, page 4](#)

A2. Who owns preparation of the customer data?

A. The customer

The brief assigns data preparation to the customer, separately from supplier import mapping.

[Return to the exercise, page 4](#)

A3. When is the readiness review?

A. Thursday at 15:00 UTC

The stated review has both a day and an explicit time zone.

[Return to the exercise, page 4](#)

D / Response choices

D1. Which launch statement is accurate?

D. Friday remains a target pending the four agreed readiness conditions.

A desired date cannot substitute for the stated acceptance and preparation conditions.

[Return to the exercise, page 8](#)

D2. Which ownership statement matches the brief?

D. Customer preparation and supplier mapping are separate responsibilities.

The allocation distinguishes source-data preparation from the supplier's mapping work.

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01 / Answers and explanations / continued

D3. A colleague needs the term for this meaning: A shared record of outcomes, actions, ownership, and measures. Which term fits?

D. success plan

A Not here. hypercare: A defined period of enhanced support after introduction. The usual combination is "define hypercare coverage".

B Not here. data migration: Moving data between systems with appropriate checks. The usual combination is "coordinate data migration".

C Not here. acceptance criterion: A defined condition used to judge whether work is acceptable. The usual combination is "agree acceptance criteria".

D Correct. success plan: A shared record of outcomes, actions, ownership, and measures. The usual combination is "agree a success plan".

[Return to the exercise, page 8](#)

D4. Rebuild the exchange from "Turn a hoped-for launch into a shared readiness plan". Omar: "That distinction helps. I can coordinate the export, but I need our data lead to confirm when an approved file will be available." Lena: [missing response] Omar: "Once the file is available, could the team start working immediately, or is there another check first?" Which response belongs in the gap?

A. Please name that person as the data owner in the plan and check their availability. We also need the agreed secure transfer route; please do not send the full customer database in an ordinary email.

A Correct. This is Lena's response in turn 6. It connects Omar's preceding point with Omar's follow-up. Naming a data owner identifies accountability, but availability and approval still require confirmation.

B Not here. This line belongs to turn 4, after Omar says: "I thought migration was part of your service. Which part are you asking us to own? My team cannot take over your technical import work." It addresses that point, not the missing turn in the supplied exchange.

C Not here. This line belongs to turn 8, after Omar says: "Once the file is available, could the team start working immediately, or is there another check first?" It addresses that point, not the missing turn in the supplied exchange.

D Not here. This line belongs to turn 2, after Omar says: "I have a launch announcement ready for next Friday. Before I send it, can you confirm we will be ready to use the system?" It addresses that point, not the missing turn in the supplied exchange.

[Return to the exercise, page 8](#)

E / Conversation

1. target date

Turn 2. Target date identifies the intended timing, while the required launch conditions remain unverified.

01 / Answers and explanations / continued

2. data preparation

Turn 4. The customer prepares and approves source data; the supplier separately handles the agreed import mapping.

3. data owner

Turn 6. Naming a data owner identifies accountability, but availability and approval still require confirmation.

4. test import

Turn 8. The test import checks the migration before operational use; receiving a file does not establish success.

5. user acceptance

Turn 10. User acceptance checks the agreed workflow against customer needs, separately from technical import completion.

6. training slot

Turn 12. A training slot needs confirmed trainer and participant availability; an invitation alone does not complete training.

7. readiness review

Turn 14. The Thursday review assesses the four conditions; scheduling the review does not satisfy them.

8. open dependency

Turn 16. An unresolved export still blocks the dependent checks even if administrator training is complete.

9. handover

Turn 18. The handover transfers support responsibility and contact details, rather than assuming the project team remains available indefinitely.

10. success plan

Turn 20. The success plan brings outcomes, owners, dependencies, and evidence together for the readiness decision.

[Return to the conversation, page 10](#)

01 / Answers and explanations / continued

F / Accuracy and scope

F1. What does a training invitation establish?

C. A proposed or scheduled event, not completed training

An invitation concerns scheduling and does not prove attendance, learning, or acceptance.

[Return to the exercise, page 13](#)

F2. What belongs in the Thursday decision?

A. The actual status of each launch condition and any unresolved dependency

Each required condition must be checked. An average can conceal a blocking dependency; completed training or file delivery cannot replace testing and user acceptance.

[Return to the exercise, page 13](#)

F / Guided speaking

1. target

Customer: Monday is still a target.

Turn 1. The launch is not confirmed because a required import check has failed.

2. Farah

Supplier: Source-data approval belongs to Farah.

Turn 2. The brief assigns source-data approval to Farah, not the supplier mapping lead.

3. test import

Customer: The incomplete technical condition is the test import.

Turn 3. Training is complete, but the test import has not succeeded.

4. 10:00 UTC

Supplier: The readiness review is Friday at 10:00 UTC.

Turn 4. The supplied time and zone identify the scheduled review, not automatic launch approval.

[Return to the conversation, page 14](#)

01 / Answers and explanations / continued

F / Rebuild the exchange

1. Rebuild the exchange from "Turn a hoped-for launch into a shared readiness plan". Omar: "I still need to tell the wider team something today. I do not want silence to create a different set of expectations." Lena: [missing response] Omar: "What if the export is late but training is complete? Would we still describe the project as ready?" Which response belongs in the gap?

C. Tell them Friday remains the target, with confirmation following the readiness review on Thursday at fifteen hundred UTC. That gives them a real decision point without implying that unresolved work is already finished.

A Not here. This line belongs to turn 2, after Omar says: "I have a launch announcement ready for next Friday. Before I send it, can you confirm we will be ready to use the system?" It addresses that point, not the missing turn in the supplied exchange.

B Not here. This line belongs to turn 8, after Omar says: "Once the file is available, could the team start working immediately, or is there another check first?" It addresses that point, not the missing turn in the supplied exchange.

C Correct. This is Lena's response in turn 14. It connects Omar's preceding point with Omar's follow-up. The Thursday review assesses the four conditions; scheduling the review does not satisfy them.

D Not here. This line belongs to turn 6, after Omar says: "That distinction helps. I can coordinate the export, but I need our data lead to confirm when an approved file will be available." It addresses that point, not the missing turn in the supplied exchange.

[Return to the exercise, page 14](#)

02 / Answers and explanations

A / Read the situation

A1. How many licensed users logged in during the period?

A. 100 of 120

The brief reports one hundred distinct logins among one hundred twenty licensed users.

[Return to the exercise, page 16](#)

A2. Which population is relevant to workflow completion here?

C. The 80 users whose roles require that workflow

The stated eligible group is eighty users, including those who did not complete the workflow.

[Return to the exercise, page 16](#)

A3. Why is the dashboard green?

D. Its current rule emphasizes logins.

The score reflects its configured rule, not proof of workflow adoption or renewal.

[Return to the exercise, page 16](#)

D / Response choices

D1. Which statement correctly describes workflow use?

C. Thirty of eighty eligible users completed it at least once in thirty days.

The measure counts distinct eligible completers within the stated period, not login activity or habit.

[Return to the exercise, page 20](#)

D2. What is the workflow completion percentage?

C. 37.5%

Thirty divided by eighty is 0.375, whereas the other bases or complement answer different questions.

[Return to the exercise, page 20](#)

02 / Answers and explanations / continued

D3. A colleague needs the term for this meaning: A distinct person or identity counted once under the measurement rule. Which term fits?

D. unique user

A Not here. leading indicator: A measure used as a possible signal of a later result. The usual combination is "test leading indicators".

B Not here. event definition: The rule specifying what a recorded action represents. The usual combination is "verify event definitions".

C Not here. breadth of adoption: How widely relevant use extends across users, teams, or functions. The usual combination is "assess adoption breadth".

D Correct. unique user: A distinct person or identity counted once under the measurement rule. The usual combination is "count unique users".

[Return to the exercise, page 20](#)

D4. Rebuild the exchange from "The green score hides a workflow gap". Mei: "Only eighty people have roles that require approvals. The other forty use different parts of the product." Daniel: [missing response] Mei: "Our meeting slide used thirty out of one hundred twenty and said twenty-five percent. Is that wrong, or are we measuring something different?" Which response belongs in the gap?

A. Then eighty is the relevant denominator for this workflow measure. Thirty of those eighty completed it at least once, which is thirty-seven point five percent.

A Correct. This is Daniel's response in turn 6. It connects Mei's preceding point with Mei's follow-up. Eighty is the eligible workflow population; using all licenses would answer a different adoption question.

B Not here. This line belongs to turn 18, after Mei says: "Let us begin with the supervisor group that reported the approver problem, then compare the same group after it is addressed." It addresses that point, not the missing turn in the supplied exchange.

C Not here. This line belongs to turn 2, after Mei says: "The dashboard is green, but my supervisors are still chasing approvals by email. What is that green score actually telling us?" It addresses that point, not the missing turn in the supplied exchange.

D Not here. This line belongs to turn 16, after Mei says: "I also want to distinguish someone who tried it once from a team that relies on it throughout the month." It addresses that point, not the missing turn in the supplied exchange.

[Return to the exercise, page 20](#)

E / Conversation

1. health score

Turn 2. The health score reflects a configured rule emphasizing logins, not verified achievement of every customer outcome.

02 / Answers and explanations / continued

2. login rate

Turn 4. The login rate uses one hundred distinct users over one hundred twenty licensed users, approximately 83.3%.

3. denominator

Turn 6. Eighty is the eligible workflow population; using all licenses would answer a different adoption question.

4. eligible population

Turn 8. The eligible population contains the users whose roles require this workflow, rather than every licensed person.

5. event definition

Turn 10. The event definition establishes what the recorded completion means; opening or starting a request may differ.

6. adoption barrier

Turn 12. An adoption barrier is the obstacle to intended use; the reported approver problem still needs investigation.

7. weighting

Turn 14. Weighting determines each component's influence; changing it should improve relevance rather than merely change the color.

8. Frequency

Turn 16. Frequency describes repeated use within a defined period; one completion does not establish habitual adoption.

9. cohort

Turn 18. A cohort supplies a consistent group for follow-up, with membership changes disclosed rather than hidden.

10. usage gap

Turn 20. The usage gap is a difference between expected and observed use, not proof of an inevitable cancellation.

[Return to the conversation, page 22](#)

02 / Answers and explanations / continued

F / Accuracy and scope

F1. What should happen before blaming resistance?

A. Verify event definitions and ask where the workflow breaks down.

Event checks and workflow evidence can distinguish configuration, role, and training barriers. Generic retraining, a convenient score change, or consulting only successful users does not diagnose the reported problem.

[Return to the exercise, page 25](#)

F2. Which follow-up comparison is sound?

D. Compare the same defined eligible group and period, noting any population changes.

Consistent definitions and explicit population changes are necessary to interpret movement in the rate.

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F / Guided speaking

1. 75%

Customer: The login rate is 75%.

Turn 1. Forty-five divided by sixty is 0.75, using all licensed users as the base.

2. 40

Manager: The eligible scheduling population is 40.

Turn 2. Forty users need the workflow, so they form the relevant completion denominator.

3. 50%

Customer: The eligible completion rate is 50%.

Turn 3. Twenty divided by forty is one half, not twenty divided by all licenses.

4. workflow completion

Manager: A login is not necessarily a workflow completion.

Turn 4. Access and completion are different events and must not be reported as interchangeable outcomes.

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02 / Answers and explanations / continued

F / Rebuild the exchange

1. Rebuild the exchange from "The green score hides a workflow gap". Mei: "Could the score include this workflow information? It is more relevant to our purchase than how often someone opens the homepage." Daniel: [missing response] Mei: "I also want to distinguish someone who tried it once from a team that relies on it throughout the month." Which response belongs in the gap?

A. We can review the weighting and the signals with our team. The purpose is a more useful account picture, not a different color chosen to justify a conclusion we already want.

A Correct. This is Daniel's response in turn 14. It connects Mei's preceding point with Mei's follow-up. Weighting determines each component's influence; changing it should improve relevance rather than merely change the color.

B Not here. This line belongs to turn 12, after Mei says: "The supervisors say people return to email when they cannot identify the next approver. I do not yet know whether that is configuration or training." It addresses that point, not the missing turn in the supplied exchange.

C Not here. This line belongs to turn 20, after Mei says: "Please keep the renewal discussion separate for now. I am describing a workflow problem, not announcing that we intend to leave." It addresses that point, not the missing turn in the supplied exchange.

D Not here. This line belongs to turn 10, after Mei says: "Before we act on thirty, I want to know what the system calls a completed approval. Could starting a request count?" It addresses that point, not the missing turn in the supplied exchange.

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03 / Answers and explanations

A / Read the situation

A1. What is the confirmed impact?

C. Scheduled exports fail for eight confirmed EU-region accounts.

The brief limits confirmed impact to scheduled exports for eight identified accounts.

[Return to the exercise, page 29](#)

A2. What does the workaround provide?

B. Administrator manual downloads, without restored scheduling

The verified workaround is a temporary manual route and does not repair automated scheduling.

[Return to the exercise, page 29](#)

A3. What is confirmed about timing?

B. The next update is at 14:00 UTC.

The communication deadline is confirmed, while the investigation outcome and fix date remain unknown.

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D / Response choices

D1. Which corrected message is accurate?

B. A verified administrator workaround is available; the fix date remains unconfirmed.

The brief confirms a bounded workaround but does not confirm restoration or a permanent-fix date.

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D2. What should happen at 14:00 UTC if nothing has changed?

B. Send the promised update and state that the investigation continues.

The agreed communication commitment applies even when the technical status is unchanged.

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03 / Answers and explanations / continued

D3. A colleague needs the term for this meaning: Data output arranged to run automatically at specified times. Which term fits?

D. scheduled export

A Not here. escalation: Routing an issue to a role with appropriate expertise or authority. The usual combination is "escalate the case".

B Not here. scope of impact: The services, users, or accounts affected. The usual combination is "verify the scope of impact".

C Not here. restoration: Return of a service or capability to the defined working state. The usual combination is "confirm service restoration".

D Correct. scheduled export: Data output arranged to run automatically at specified times. The usual combination is "restore scheduled exports".

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D4. Rebuild the exchange from "Offer the verified workaround without inventing a fix date". Asha: "I will avoid saying exports are fully restored. Do we know how many accounts are affected?" Leon: [missing response] Asha: "One contact has asked whether the underlying report data has disappeared. I do not see an approved statement about that." Which response belongs in the gap?

B. The confirmed impact is scheduled-export failure in eight accounts in the EU region. That is what we have verified so far, not proof that no additional accounts will report the issue.

A Not here. This line belongs to turn 2, after Asha says: "I am about to send the customer update, but it says fixed tomorrow. Where did that date come from? Has engineering actually confirmed it?" It addresses that point, not the missing turn in the supplied exchange.

B Correct. This is Leon's response in turn 6. It connects Asha's preceding point with Asha's follow-up. Confirmed impact currently covers scheduled-export failures for eight identified EU-region accounts, not every account or service.

C Not here. This line belongs to turn 12, after Asha says: "Their finance lead needs a report before an afternoon meeting. Can I ask which report is most urgent without changing the incident severity myself?" It addresses that point, not the missing turn in the supplied exchange.

D Not here. This line belongs to turn 4, after Asha says: "The customer is missing its morning reports and wants something useful now. What exactly can we offer?" It addresses that point, not the missing turn in the supplied exchange.

[Return to the exercise, page 33](#)

E / Conversation

1. permanent fix

Turn 2. No permanent-fix date is confirmed; the proposed message incorrectly converts uncertainty into a promise.

03 / Answers and explanations / continued

2. workaround

Turn 4. The workaround allows administrator manual downloads but does not correct automated scheduling or establish permanent resolution.

3. confirmed impact

Turn 6. Confirmed impact currently covers scheduled-export failures for eight identified EU-region accounts, not every account or service.

4. scope of impact

Turn 8. The scope must be verified for each claim; export failure alone establishes neither data loss nor its absence.

5. support case

Turn 10. Linking the support case to I42 keeps account-specific reports connected to the coordinated incident response.

6. customer impact

Turn 12. Customer impact describes the blocked business work and helps reviewers assess needs without inventing a resolution promise.

7. update cadence

Turn 14. The agreed cadence requires the promised update even if the investigation has not produced a new finding.

8. ETA

Turn 16. ETA concerns estimated completion of a specified event; the update appointment is not a technical fix estimate.

9. resolution criteria

Turn 18. Resolution criteria determine closure; successful temporary manual access does not establish restoration of scheduled exports.

10. status update

Turn 20. The status update should align verified impact, workaround limits, unknowns, and the confirmed communication time.

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03 / Answers and explanations / continued

F / Accuracy and scope

F1. Which scope statement avoids overclaiming?

B. Eight accounts are confirmed affected; wider impact is still being checked.

Confirmed cases define current knowledge rather than establishing a complete global boundary.

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F2. Which statement requires additional verified evidence?

A. No data was lost and no security issue occurred.

The supplied facts establish neither data-loss status nor security conclusions, so those assurances are unsupported.

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F / Guided speaking

1. five

Manager: The known affected-account count is five.

Turn 1. Five is the confirmed count, not proof that no further accounts could be affected.

2. administrator access

Customer: The temporary route requires administrator access.

Turn 2. The manual route is restricted to administrators under the supplied workaround conditions.

3. unknown

Manager: The permanent-fix date remains unknown.

Turn 3. No completion date has been confirmed, despite the available temporary route.

4. 11:30 UTC

Customer: The next update is at 11:30 UTC.

Turn 4. The stated time is a communication commitment rather than a promise of technical completion.

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03 / Answers and explanations / continued

F / Rebuild the exchange

1. Rebuild the exchange from "Offer the verified workaround without inventing a fix date". Asha: "We promised another message at fourteen hundred UTC. If engineering has no new finding, should I wait until there is more to say?" Leon: [missing response] Asha: "I want to be clear that fourteen hundred refers to communication. Otherwise the customer may hear it as another completion time." Which response belongs in the gap?

D. Keep the update cadence. At fourteen hundred UTC, state that investigation continues, confirm any unchanged workaround, and give the next communication point agreed by the response team.

A Not here. This line belongs to turn 10, after Asha says: "Our account contact has two different messages: one from the ticket and one from the incident update. How do we get them back to a consistent status?" It addresses that point, not the missing turn in the supplied exchange.

B Not here. This line belongs to turn 18, after Asha says: "If someone can download the report manually, should support close the incident or leave it open?" It addresses that point, not the missing turn in the supplied exchange.

C Not here. This line belongs to turn 16, after Asha says: "I want to be clear that fourteen hundred refers to communication. Otherwise the customer may hear it as another completion time." It addresses that point, not the missing turn in the supplied exchange.

D Correct. This is Leon's response in turn 14. It connects Asha's preceding point with Asha's follow-up. The agreed cadence requires the promised update even if the investigation has not produced a new finding.

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04 / Answers and explanations

A / Read the situation

A1. What change do the time logs show?

C. A 12-hour difference between the two recorded cycles

Forty minus twenty-eight is twelve hours, but the logs cover only the stated cycles.

[Return to the exercise, page 40](#)

A2. Which input has not been validated?

A. The \$40 hourly valuation

Joel confirms the time logs, while the hourly monetary value remains an assumption.

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A3. Why is a proven full ROI claim unsupported?

D. Attribution and recurring benefits are unverified, and relevant costs are incomplete.

The evidence leaves causal, recurring-benefit, valuation, and cost gaps that prevent the asserted financial conclusion.

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D / Response choices

D1. What follows from the stated hourly assumption?

C. Twelve hours at \$40 would be valued at \$480 per cycle.

Multiplication produces a conditional value, not proof of cash savings or exclusive causation.

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D2. What is required to describe \$5,760 responsibly?

A. State the assumptions of twelve similar monthly cycles and the unvalidated hourly value.

Annualization extends a limited observation and therefore needs explicit frequency, recurrence, and valuation assumptions.

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04 / Answers and explanations / continued

D3. A colleague needs the term for this meaning: The time window used as the counterpart in an analysis. Which term fits?

D. comparison period

A Not here. cash saving: A reduction in actual expenditure under a defined comparison. The usual combination is "verify cash savings".

B Not here. confounding factor: Another influence that complicates attribution of an observed change. The usual combination is "identify confounding factors".

C Not here. cost base: The costs included in a comparison or calculation. The usual combination is "define the cost base".

D Correct. comparison period: The time window used as the counterpart in an analysis. The usual combination is "align comparison periods".

[Return to the exercise, page 44](#)

D4. Rebuild the exchange from "Replace the impressive ROI claim with a defensible value story". Joel: "The twelve-hour difference is correct. Where did the forty-dollar hourly number come from?" Kira: [missing response] Joel: "And the five-thousand-seven-hundred-sixty-dollar annual figure assumes that the same thing happens every month?" Which response belongs in the gap?

D. It is an unvalidated hourly valuation in my calculation. At that rate, twelve hours would be worth four hundred eighty dollars for a cycle, but I should not present your approval as already given.

A Not here. This line belongs to turn 10, after Joel says: "Nobody's pay has changed, and we have not reduced the team. The time may be useful, but it has not disappeared from our expenditure." It addresses that point, not the missing turn in the supplied exchange.

B Not here. This line belongs to turn 20, after Joel says: "Please revise the slide before the business review. Keep the time difference, but remove the proven-return headline." It addresses that point, not the missing turn in the supplied exchange.

C Not here. This line belongs to turn 2, after Joel says: "I signed off the time logs, not a proven-ROI claim. Can we go through the slide before this reaches the quarterly review?" It addresses that point, not the missing turn in the supplied exchange.

D Correct. This is Kira's response in turn 6. It connects Joel's preceding point with Joel's follow-up. The forty-dollar hourly valuation is an assumption, not a rate already confirmed by the customer.

[Return to the exercise, page 44](#)

E / Conversation

1. observed change

Turn 2. The logs establish a twelve-hour difference between two cycles, not a proven recurring financial return.

04 / Answers and explanations / continued

2. attribution

Turn 4. Attribution remains uncertain because other process changes could contribute to the observed time difference.

3. hourly valuation

Turn 6. The forty-dollar hourly valuation is an assumption, not a rate already confirmed by the customer.

4. annualization

Turn 8. Annualization multiplies the conditional cycle value by twelve, assuming similar monthly results rather than demonstrating them.

5. released capacity

Turn 10. Released capacity makes time available for other work without necessarily lowering payroll or cash expenditure.

6. cost base

Turn 12. The cost base is incomplete because known subscription charges exclude unrecorded implementation and training resources.

7. value narrative

Turn 14. A value narrative can report useful operational evidence while clearly separating assumptions and missing financial inputs.

8. baseline

Turn 16. The baseline must use a consistent task and measurement definition so later comparisons remain interpretable.

9. outcome owner

Turn 18. The outcome owner confirms the relevant result; finance and operations can validate different parts of the evidence.

10. value realization

Turn 20. Value realization concerns benefits actually achieved, which must be separated from the book's conditional financial estimates.

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04 / Answers and explanations / continued

F / Accuracy and scope

F1. Which cost statement is accurate?

C. The \$3,600 subscription is known, but the full cost base is incomplete.

Incomplete cost records prevent a full return calculation without establishing either a positive or negative result.

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F2. Which review conclusion is strongest?

C. Report the observed operational change and agree a consistent validation plan.

A bounded observation and explicit next evidence preserve useful learning without inventing financial certainty.

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F / Guided speaking

1. six hours

Customer: The observed time difference is six hours.

Turn 1. Thirty minus twenty-four gives six hours for the compared cycle, not a proven recurring annual benefit.

2. \$210

Manager: At the assumed rate, the cycle value would be \$210.

Turn 2. Six multiplied by thirty-five equals two hundred ten, conditional on the unvalidated hourly value.

3. cash savings

Customer: Unchanged expenditure means this is not verified cash savings.

Turn 3. Time released does not establish a reduction in actual spending.

4. implementation costs

Manager: A full return calculation still lacks implementation costs.

Turn 4. The missing implementation costs make the relevant cost base incomplete.

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04 / Answers and explanations / continued

F / Rebuild the exchange

1. Rebuild the exchange from "Replace the impressive ROI claim with a defensible value story". Joel: "I am not saying there is no value. The reporting cycle took less time. I want that useful result kept, without turning it into money we have not saved." Kira: [missing response] Joel: "For the next review, let us measure the same reporting task across more cycles. Otherwise changes in the task itself could distort the comparison." Which response belongs in the gap?

C. Agreed. We can build a stronger value narrative around what we know. The recorded change is useful; the mistake was presenting an assumed financial interpretation as an established result.

A Not here. This line belongs to turn 4, after Joel says: "There were other process changes at the same time. We simplified the approval route as well as introducing the product." It addresses that point, not the missing turn in the supplied exchange.

B Not here. This line belongs to turn 10, after Joel says: "Nobody's pay has changed, and we have not reduced the team. The time may be useful, but it has not disappeared from our expenditure." It addresses that point, not the missing turn in the supplied exchange.

C Correct. This is Kira's response in turn 14. It connects Joel's preceding point with Joel's follow-up. A value narrative can report useful operational evidence while clearly separating assumptions and missing financial inputs.

D Not here. This line belongs to turn 12, after Joel says: "We pay thirty-six hundred annually for the subscription. The implementation effort and training time are not fully in the model yet." It addresses that point, not the missing turn in the supplied exchange.

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05 / Answers and explanations

A / Read the situation

A1. What is the renewal date?

D. 12 November

The subscription is scheduled for renewal on 12 November; 8 October is a discovery meeting.

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A2. What is known about the decision?

D. Neither cancellation nor renewal approval has been received.

The brief leaves the commercial outcome open while identifying information gaps and a stakeholder change.

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A3. What is the next agreed customer event?

A. A discovery meeting on 8 October at 10:00 UTC

The agreed meeting explores the current position and is not itself an approval or signature.

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D / Response choices

D1. Which internal renewal update is justified?

A. The contact has changed; priorities and decision roles need confirmation; the outcome is open.

The known stakeholder change supports investigation, not a predetermined commercial outcome.

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D2. What should Rafael ask Ella first?

A. What matters now and who participates in the decision

Open factual discovery establishes the current context without imposing an unsupported interpretation.

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05 / Answers and explanations / continued

D3. A colleague needs the term for this meaning: The person accountable for the relevant funding decision. Which term fits?

B. budget owner

A Not here. churn risk: The possibility of losing customer business, with its basis specified. The usual combination is "assess churn risk".

B Correct. budget owner: The person accountable for the relevant funding decision. The usual combination is "confirm the budget owner".

C Not here. NRR: Net revenue retention; retained starting recurring revenue including expansion on a defined basis. The usual combination is "calculate NRR".

D Not here. procurement route: The customer's process for reviewing and completing a purchase. The usual combination is "verify the procurement route".

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D4. Rebuild the exchange from "Rebuild the renewal conversation after the main contact leaves". Rafael: "We can use our meeting on the eighth of October at ten hundred UTC to clarify that. Who else should contribute to the discussion?" Ella: [missing response] Rafael: "Agreed. We can distinguish operational needs, funding, and purchasing steps. I will keep you involved as we establish the right route." Which response belongs in the gap?

C. Let me check the roles first. I do not want an invitation to imply that I am the budget owner or that finance has already approved continuation.

A Not here. This line belongs to turn 2, after Rafael says: "Thanks for picking this up during the reorganization. Renewal is November twelfth, but before we discuss terms, what has changed for your team?" It addresses that point, not the missing turn in the supplied exchange.

B Not here. This line belongs to turn 16, after Rafael says: "I could ask about commercial options, but we have not established a price problem. Is the immediate issue fit, budget, the buying process, or missing context?" It addresses that point, not the missing turn in the supplied exchange.

C Correct. This is Ella's response in turn 6. It connects Rafael's preceding point with Rafael's follow-up. The budget owner controls the relevant funding decision; an operations role or meeting invitation does not establish that authority.

D Not here. This line belongs to turn 8, after Rafael says: "Agreed. We can distinguish operational needs, funding, and purchasing steps. I will keep you involved as we establish the right route." It addresses that point, not the missing turn in the supplied exchange.

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E / Conversation

1. renewal owner

Turn 2. The renewal owner coordinates the decision process; Ella has not confirmed that this responsibility belongs to her.

05 / Answers and explanations / continued

2. success criteria

Turn 4. Success criteria need reconfirmation because the reorganization may change which customer outcomes matter most.

3. budget owner

Turn 6. The budget owner controls the relevant funding decision; an operations role or meeting invitation does not establish that authority.

4. stakeholder change

Turn 8. The departure and replacement of the main contact create an information gap, not automatic cancellation or renewal.

5. value evidence

Turn 10. Value evidence should show validated customer results, with uncertain or outdated claims clearly identified.

6. risk signal

Turn 12. A risk signal indicates a possible retention issue but does not establish the customer's final decision.

7. procurement route

Turn 14. The procurement route identifies the actual customer purchasing steps, rather than assuming operations can complete them alone.

8. save plan

Turn 16. A save plan should address an evidenced retention problem; an unexplained discount may miss the actual customer issue.

9. renewal forecast

Turn 18. The renewal forecast must reflect current evidence; a booked meeting is not approval or a guaranteed outcome.

10. renewal plan

Turn 20. The renewal plan records the agreed actions, owners, and dates while preserving unresolved decision questions.

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05 / Answers and explanations / continued

F / Accuracy and scope

F1. For starting recurring revenue 100, loss 10, contraction 5, and expansion 20, what is GRR?

B. 85%

Gross retention excludes expansion: one hundred minus ten minus five, divided by one hundred.

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F2. Using those same figures, what is NRR?

A. 105%

Net retention includes expansion: one hundred minus ten minus five plus twenty, divided by one hundred.

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F / Guided speaking

1. 20 December

Manager: The recorded renewal date is 20 December.

Turn 1. The renewal date differs from the earlier needs-review meeting.

2. needs review

Contact: The fourth of November is a needs review.

Turn 2. The agreed event explores needs and is not a contract signature or approval.

3. unconfirmed

Manager: The funding decision role remains unconfirmed.

Turn 3. The new contact has not identified the budget owner.

4. open

Contact: The commercial outcome is still open.

Turn 4. Neither renewal nor cancellation is recorded, so neither conclusion is justified.

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05 / Answers and explanations / continued

F / Rebuild the exchange

1. Rebuild the exchange from "Rebuild the renewal conversation after the main contact leaves". Rafael: "Before we discuss terms, we should also verify the agreement's notice requirements and the current purchasing steps. I do not want to assume how those work." Ella: [missing response] Rafael: "I could ask about commercial options, but we have not established a price problem. Is the immediate issue fit, budget, the buying process, or missing context?" Which response belongs in the gap?

C. I can help locate the right colleagues. The procurement route may have changed in the reorganization, so last year's contacts are not necessarily the people who can complete this year's process.

A Not here. This line belongs to turn 4, after Rafael says: "That is helpful to know. Our earlier reviews focused on reducing the service backlog, but I do not want to assume that is still the main priority." It addresses that point, not the missing turn in the supplied exchange.

B Not here. This line belongs to turn 8, after Rafael says: "Agreed. We can distinguish operational needs, funding, and purchasing steps. I will keep you involved as we establish the right route." It addresses that point, not the missing turn in the supplied exchange.

C Correct. This is Ella's response in turn 14. It connects Rafael's preceding point with Rafael's follow-up. The procurement route identifies the actual customer purchasing steps, rather than assuming operations can complete them alone.

D Not here. This line belongs to turn 10, after Rafael says: "I can summarize the agreed objectives, recorded usage, and the results previously discussed, marking anything that still needs your validation." It addresses that point, not the missing turn in the supplied exchange.

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06 / Answers and explanations

A / Read the situation

A1. How many existing seats are unassigned?

B. 30

Eighty total licenses minus fifty assigned leaves thirty unassigned seats.

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A2. How many assigned users have completed onboarding?

D. 35 of 50

The stated completion count is thirty-five among the fifty currently assigned users.

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A3. What must happen before using existing unassigned seats?

B. The customer license owner must confirm entitlement and allocation.

The brief makes license-owner confirmation a prerequisite without assuming a new purchase is necessary.

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D / Response choices

D1. Which response best fits the request?

C. Confirm needs and allocation rights before deciding whether additional licenses are necessary.

The relevant decision depends on entitlement, customer need, and readiness, not an automatic sale or blanket refusal.

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D2. If 25 existing unassigned seats are authorized for the new team, how many remain?

B. 5

Thirty unassigned seats minus twenty-five allocated seats leaves five.

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06 / Answers and explanations / continued

D3. A colleague needs the term for this meaning: A unit of user access under specified licensing terms. Which term fits?

D. seat

A Not here. true-up: Adjustment to align reported or licensed usage with contractual requirements. The usual combination is "review true-up terms".

B Not here. incremental demand: Additional need beyond an established baseline. The usual combination is "establish incremental demand".

C Not here. license utilization: Use or allocation of licenses under a stated measurement definition. The usual combination is "define license utilization".

D Correct. seat: A unit of user access under specified licensing terms. The usual combination is "count available seats".

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D4. Rebuild the exchange from "Check the existing capacity before selling more seats". Nora: "I will involve our license owner. If those seats can be allocated, the remaining number would be five, correct?" Sam: [missing response] Nora: "I also see that only thirty-five of our fifty assigned users have finished onboarding. I do not want the new group to repeat the same difficulties." Which response belongs in the gap?

B. Correct, subject to that approved allocation. Twenty-five taken from thirty leaves five. It would not increase the total from eighty to one hundred five.

A Not here. This line belongs to turn 10, after Nora says: "The new team has not confirmed who will attend training. Their manager asked for access before discussing the practical schedule." It addresses that point, not the missing turn in the supplied exchange.

B Correct. This is Sam's response in turn 6. It connects Nora's preceding point with Nora's follow-up. Authorized allocation of twenty-five from thirty unassigned seats would leave five, without increasing total licenses.

C Not here. This line belongs to turn 16, after Nora says: "Some teams have shared access in other systems. I assume that is not something we should improvise here." It addresses that point, not the missing turn in the supplied exchange.

D Not here. This line belongs to turn 14, after Nora says: "There is one difference in their workflow: an extra approval step. We have not checked whether our current configuration can handle it." It addresses that point, not the missing turn in the supplied exchange.

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E / Conversation

1. unassigned seats

Turn 2. Thirty unassigned seats exist, but their allocation still depends on the customer's confirmed licensing rights and process.

06 / Answers and explanations / continued

2. entitlement

Turn 4. Entitlement defines permitted use under the agreement; a visible unassigned count alone does not establish permission.

3. allocation

Turn 6. Authorized allocation of twenty-five from thirty unassigned seats would leave five, without increasing total licenses.

4. onboarding completion

Turn 8. Thirty-five of fifty assigned users completed onboarding, leaving fifteen whose preparation is not complete.

5. readiness gap

Turn 10. Unconfirmed training attendance and ownership are readiness gaps even if enough valid licenses are available.

6. incremental demand

Turn 12. Incremental demand is the additional need beyond usable existing rights, not simply the number of newly interested users.

7. fit assessment

Turn 14. The fit assessment checks the new team's actual workflow and access needs before recommending a purchase or rollout.

8. named-user licenses

Turn 16. Named-user licenses apply to identified individuals under their terms and must not be treated as shared-login permission.

9. commercial option

Turn 18. A commercial option should state the justified quantity, term, charges, and status rather than conceal assumptions.

10. Expansion readiness

Turn 20. Expansion readiness combines usable rights, workflow fit, and practical preparation; it is not established by a purchase request alone.

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06 / Answers and explanations / continued

F / Accuracy and scope

F1. What is the stated onboarding completion rate among assigned users?

A. 70%

Thirty-five divided by fifty equals seventy percent; dividing by all eighty licenses uses a different denominator.

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F2. Which proposal would be transparent?

D. A justified quantity with term, charges, allocation basis, and approval status

A transparent commercial option explains its basis and terms rather than concealing need, permissions, or status.

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F / Guided speaking

1. 30

Manager: The unassigned count is 30.

Turn 1. One hundred total licenses minus seventy assigned leaves thirty unassigned.

2. ten

Customer: If twenty existing seats are authorized, ten remain.

Turn 2. Thirty minus twenty leaves ten, conditional on approved allocation.

3. 70%

Manager: Onboarding completion among assigned users is 70%.

Turn 3. Forty-nine divided by seventy is seventy percent, using assigned users as the denominator.

4. entitlement

Customer: Before allocation, we must confirm entitlement.

Turn 4. A spare count does not itself establish permitted use for the new team.

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06 / Answers and explanations / continued

F / Rebuild the exchange

1. Rebuild the exchange from "Check the existing capacity before selling more seats". Nora: "There is one difference in their workflow: an extra approval step. We have not checked whether our current configuration can handle it." Sam: [missing response] Nora: "Some teams have shared access in other systems. I assume that is not something we should improvise here." Which response belongs in the gap?

D. Then include that in the fit assessment. More seats do not solve a workflow mismatch by themselves. We should check capability and configuration alongside the training plan.

A Not here. This line belongs to turn 10, after Nora says: "The new team has not confirmed who will attend training. Their manager asked for access before discussing the practical schedule." It addresses that point, not the missing turn in the supplied exchange.

B Not here. This line belongs to turn 6, after Nora says: "I will involve our license owner. If those seats can be allocated, the remaining number would be five, correct?" It addresses that point, not the missing turn in the supplied exchange.

C Not here. This line belongs to turn 16, after Nora says: "Some teams have shared access in other systems. I assume that is not something we should improvise here." It addresses that point, not the missing turn in the supplied exchange.

D Correct. This is Sam's response in turn 14. It connects Nora's preceding point with Nora's follow-up. The fit assessment checks the new team's actual workflow and access needs before recommending a purchase or rollout.

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07 / Answers and explanations

A / Read the situation

A1. What problem has the customer reported?

D. Repeated navigation between similar approval requests

The brief identifies repetitive navigation, while retaining separate authorized decisions remains a requirement.

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A2. What record must an interim approach preserve?

A. A separate authorized decision for each request

The customer explicitly requires an individual authorized decision record for every request.

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A3. What does logging the feature request establish?

A. That the need has been recorded for assessment

Recording feedback does not itself determine priority, feasibility, or release timing.

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D / Response choices

D1. Which problem statement best represents the case?

A. Repeated navigation slows similar-request review while individual decisions must remain traceable.

The statement captures the reported effort and preserves the explicit decision-record constraint.

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D2. Which interim statement is responsible?

D. A saved view may help navigation, subject to verified filters and permissions.

The known capability is a view, not bulk approval or permission to remove required controls.

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07 / Answers and explanations / continued

D3. A colleague needs the term for this meaning: The sequence of activities used to complete a task. Which term fits?

D. workflow

A Not here. authorization: Permission to perform a specified action. The usual combination is "verify authorization".

B Not here. reproduction steps: A sequence allowing others to observe reported behavior. The usual combination is "provide reproduction steps".

C Not here. feasibility: Whether a proposed approach can be achieved under relevant constraints. The usual combination is "assess feasibility".

D Correct. workflow: The sequence of activities used to complete a task. The usual combination is "map the workflow".

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D4. Rebuild the exchange from "Discover the workflow behind the requested button". Nia: "Yes. Even a routine request needs its own authorized decision. We cannot lose the record of who decided what." Teo: [missing response] Nia: "We currently move back to the full list after each review. Could the product at least keep the relevant requests together?" Which response belongs in the gap?

C. That audit trail is a required constraint, not an optional detail. About one hundred sixty non-exception requests does not mean one hundred sixty records can be approved without an individual decision.

A Not here. This line belongs to turn 2, after Nia says: "Could we have a bulk-approval button? Our approvers keep opening similar requests one by one, then going back to the full list." It addresses that point, not the missing turn in the supplied exchange.

B Not here. This line belongs to turn 4, after Nia says: "Navigation is the part people complain about most. Twenty approvers handle about two hundred requests a week, and around forty need closer exception review." It addresses that point, not the missing turn in the supplied exchange.

C Correct. This is Teo's response in turn 6. It connects Nia's preceding point with Nia's follow-up. The audit trail must retain a separate authorized decision for each request, including routine requests.

D Not here. This line belongs to turn 10, after Nia says: "We can test whether the view helps, provided the exceptions stay visible and nobody gains permission they should not have." It addresses that point, not the missing turn in the supplied exchange.

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E / Conversation

1. feature request

Turn 2. The proposed bulk-approval button is a feature request, not yet an agreed solution or delivery commitment.

07 / Answers and explanations / continued

2. problem statement

Turn 4. The reported problem is repeated navigation during review, while exception handling and individual decisions remain necessary.

3. audit trail

Turn 6. The audit trail must retain a separate authorized decision for each request, including routine requests.

4. saved view

Turn 8. A saved view can organize selected records, but it does not create or confirm a bulk-approval capability.

5. acceptance criteria

Turn 10. Acceptance criteria specify what a useful approach must achieve while preserving exception visibility and authorization boundaries.

6. use case

Turn 12. The use case describes the actual approver task, sequence, and context without requiring the customer to design the product.

7. impact statement

Turn 14. The impact statement explains the navigation burden without falsely claiming that the customer wants approval judgment removed.

8. product backlog

Turn 16. A backlog records potential work; entry does not establish delivery priority or a release commitment.

9. Prioritization

Turn 18. Prioritization considers relative value and constraints rather than guaranteeing delivery order from submission date alone.

10. feedback loop

Turn 20. Closing the feedback loop returns the assessment to the customer, including alternatives or unchanged status rather than silence.

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07 / Answers and explanations / continued

F / Accuracy and scope

F1. What should the product handoff include?

A. The workflow, frequency, impact, constraints, and representative approved examples

The handoff must capture the actual task and constraints. Popularity, a proposed design, or a selectively scoped estimate cannot replace evidence of the workflow and required individual decisions.

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F2. Which customer update correctly describes backlog status?

D. The request is recorded for assessment; priority and delivery timing are not confirmed.

Recorded work remains distinct from prioritization, implementation, testing, and actual release.

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F / Guided speaking

1. repeated navigation

Customer: The reported obstacle is repeated navigation.

Turn 1. The stated problem concerns moving between tickets, not permission to remove closure decisions.

2. authorized closure record

Manager: Each ticket must retain an authorized closure record.

Turn 2. The required record remains a constraint for any interim or future approach.

3. saved queue view

Customer: The existing capability is a saved queue view.

Turn 3. A view organizes tickets but does not establish batch-closure functionality.

4. not scheduled

Manager: The release status for batch closure is not scheduled.

Turn 4. No confirmed delivery schedule is supplied, so logging interest cannot become a release promise.

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07 / Answers and explanations / continued

F / Rebuild the exchange

1. Rebuild the exchange from "Discover the workflow behind the requested button".
Nia: "Please make the navigation problem clear in your note. We are trying to avoid repeated clicks, not asking you to remove the individual review." **Teo:** [missing response] **Nia:** "Once the request is logged, does that mean it is in the next release? I need to explain the status internally." Which response belongs in the gap?

C. I will include that in the impact statement. I will send the workflow, frequency, constraints, and examples to Arun, then confirm that the summary represents what you actually need.

A Not here. This line belongs to turn 16, after Nia says: "Once the request is logged, does that mean it is in the next release? I need to explain the status internally." It addresses that point, not the missing turn in the supplied exchange.

B Not here. This line belongs to turn 18, after Nia says: "Could another customer need move ahead of ours even if our request came first?" It addresses that point, not the missing turn in the supplied exchange.

C Correct. This is Teo's response in turn 14. It connects Nia's preceding point with Nia's follow-up. The impact statement explains the navigation burden without falsely claiming that the customer wants approval judgment removed.

D Not here. This line belongs to turn 4, after Nia says: "Navigation is the part people complain about most. Twenty approvers handle about two hundred requests a week, and around forty need closer exception review." It addresses that point, not the missing turn in the supplied exchange.

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08 / Answers and explanations

A / Read the situation

A1. What does the available 17 September note say?

A. Late October is a target subject to testing.

The note records conditional planning language, not the confirmed date the customer requests.

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A2. What can Idris commit to?

A. A status update by Thursday at 15:00 UTC

Idris controls the stated communication step, while delivery, compensation, and the full history remain unresolved.

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A3. What should happen if other evidence exists?

D. Preserve and review it through the appropriate process.

Additional records may matter and should be reviewed without changing history or assuming new authority.

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D / Response choices

D1. Which response addresses the disputed promise accurately?

A. The available note is conditional; let us review any other records you relied on.

The response distinguishes the available wording from the incomplete history without inventing certainty in either direction.

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D2. Which statement preserves a useful communication commitment?

C. I will update you by Thursday at 15:00 UTC, even if review is still pending.

Idris can commit to communication without promising a delivery or compensation outcome outside his authority.

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08 / Answers and explanations / continued

D3. A colleague needs the term for this meaning: Wording that limits or conditions a statement. Which term fits?

C. qualification

A Not here. factual chronology: A time-ordered account of events and evidence. The usual combination is "compile a factual chronology".

B Not here. resolution path: The route for assessing and addressing an issue. The usual combination is "explain the resolution path".

C Correct. qualification: Wording that limits or conditions a statement. The usual combination is "preserve the qualification".

D Not here. acknowledgment: Recognition of a concern or impact without necessarily accepting every claim. The usual combination is "give a clear acknowledgment".

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D4. Rebuild the exchange from "Repair the expectation without promising a date you cannot confirm". Beth: "I may have a presentation from the earlier meeting. I will send it through the customer support channel." Idris: [missing response] Beth: "We have spent time preparing for this. I also want a credit, not just another explanation of your process." Which response belongs in the gap?

B. Please do. We will preserve that supporting evidence alongside the note and review the full context. I do not want either of us to rely on a selective quotation or an incomplete sequence.

A Not here. This line belongs to turn 4, after Beth says: "The discussion was much more definite than that. I do not want you to use one note to dismiss everything we heard." It addresses that point, not the missing turn in the supplied exchange.

B Correct. This is Idris's response in turn 6. It connects Beth's preceding point with Beth's follow-up. Additional messages or presentations may clarify the history and should be preserved for review rather than dismissed.

C Not here. This line belongs to turn 10, after Beth says: "This is infuriating. Your team has handled it badly, and I want someone senior to take responsibility." It addresses that point, not the missing turn in the supplied exchange.

D Not here. This line belongs to turn 14, after Beth says: "Fine. My concern is that nobody has taken ownership. What will actually happen next, and when will I hear from you?" It addresses that point, not the missing turn in the supplied exchange.

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E / Conversation

1. expectation gap

Turn 2. The expectation gap concerns the October timing Beth relied on versus the conditional status currently documented.

08 / Answers and explanations / continued

2. conditional estimate

Turn 4. The note targets late October subject to testing, which is conditional rather than a confirmed release date.

3. supporting evidence

Turn 6. Additional messages or presentations may clarify the history and should be preserved for review rather than dismissed.

4. compensation request

Turn 8. Idris can route the requested credit for review but does not hold authority to approve compensation.

5. complaint escalation

Turn 10. Complaint escalation sends the substantive concern to an appropriate reviewer; direct criticism is not itself abusive conduct.

6. boundary

Turn 12. The boundary addresses personal insults while keeping the customer's underlying complaint and right to challenge the service intact.

7. review owner

Turn 14. The review owner coordinates assessment of the records and request; identifying that person does not predetermine the result.

8. resolution path

Turn 16. The resolution path covers assessment and follow-up; a scheduled status message is not a completed remedy or release commitment.

9. read-back

Turn 18. The read-back checks the concern, impact, disputed evidence, and requested review with the customer before the handoff.

10. Trust repair

Turn 20. Trust repair depends on accurate review and reliable follow-through, not an unsupported promise made to end tension.

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08 / Answers and explanations / continued

F / Accuracy and scope

F1. Which behavior alone does not justify treating the customer as abusive?

D. Firmly disputing the record and requesting accountability

Direct criticism and a substantive complaint are not equivalent to personal abuse.

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F2. If the stated procedure requires a pause, what should Idris preserve?

A. A clear support route, complaint record, owner, and next contact

A conduct pause should not remove appropriate support or prevent review of the underlying concern.

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F / Guided speaking

1. conditional target

Manager: The documented timing is a conditional target.

Turn 1. The testing qualification prevents the available note from establishing an unconditional date.

2. review

Customer: My additional messages should be sent for review.

Turn 2. Further records may clarify the history and should not be dismissed or treated as automatic approval.

3. credit

Manager: I cannot approve the requested credit.

Turn 3. Vik lacks compensation authority even though he can record and route the request.

4. 09:00 UTC

Customer: The next status update is Tuesday at 09:00 UTC.

Turn 4. The stated appointment is for communication, not a guaranteed delivery or compensation decision.

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08 / Answers and explanations / continued

F / Rebuild the exchange

1. Rebuild the exchange from "Repair the expectation without promising a date you cannot confirm". Beth: "Fine. My concern is that nobody has taken ownership. What will actually happen next, and when will I hear from you?" Idris: [missing response] Beth: "A status update is fine, as long as the complaint stays open. We still need an answer on the date and the preparation costs we incurred." Which response belongs in the gap?

D. I will confirm the review owner and update you by Thursday at fifteen hundred UTC. That update may say the assessment is still pending, but I will not leave you waiting without the promised contact.

A Not here. This line belongs to turn 4, after Beth says: "The discussion was much more definite than that. I do not want you to use one note to dismiss everything we heard." It addresses that point, not the missing turn in the supplied exchange.

B Not here. This line belongs to turn 6, after Beth says: "I may have a presentation from the earlier meeting. I will send it through the customer support channel." It addresses that point, not the missing turn in the supplied exchange.

C Not here. This line belongs to turn 18, after Beth says: "Then summarize what you have understood so I can correct anything before the manager sees it." It addresses that point, not the missing turn in the supplied exchange.

D Correct. This is Idris's response in turn 14. It connects Beth's preceding point with Beth's follow-up. The review owner coordinates assessment of the records and request; identifying that person does not predetermine the result.

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Review 1 / Explanations

Cumulative review

1. A colleague needs the term for this meaning: The initial meeting aligning purpose, people, and approach. Which term fits?

A. kickoff

A Correct. kickoff: The initial meeting aligning purpose, people, and approach. The usual combination is "run a kickoff".

B Not here. UAT: User acceptance testing; users checking the solution against agreed needs. The usual combination is "schedule UAT".

C Not here. rollback plan: An approved approach for reversing a change if required. The usual combination is "review the rollback plan".

D Not here. prerequisite: Something required before a particular activity can proceed. The usual combination is "verify prerequisites".

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2. A colleague needs the term for this meaning: Finishing the defined sequence of work. Which term fits?

D. workflow completion

A Not here. usage telemetry: Recorded data about product interactions. The usual combination is "validate usage telemetry".

B Not here. health score: A configured indicator combining selected account signals. The usual combination is "interpret the health score".

C Not here. adoption: Use of a product or workflow in the intended working context. The usual combination is "assess adoption".

D Correct. workflow completion: Finishing the defined sequence of work. The usual combination is "measure workflow completion".

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Review 1 / Explanations / continued

3. Rebuild the exchange from "Turn a hoped-for launch into a shared readiness plan". Omar: "Two team leads could check the workflow. I will confirm their availability before putting their names in the plan." Lena: [missing response] Omar: "The training invitation is not out yet. Our administrator works across two sites, so I need to check which session they can attend." Which response belongs in the gap?

C. Good. Their user acceptance needs a clear basis: the agreed task, expected result, and any exceptions. We should know what successful completion means before deciding whether the system is ready.

A Not here. This line belongs to turn 18, after Omar says: "Please also make clear who supports the team after launch. They should not have to guess which contact to use." It addresses that point, not the missing turn in the supplied exchange.

B Not here. This line belongs to turn 20, after Omar says: "I will confirm the data lead and user testers, check their availability, and send a conditional update to the team." It addresses that point, not the missing turn in the supplied exchange.

C Correct. This is Lena's response in turn 10. It connects Omar's preceding point with Omar's follow-up. User acceptance checks the agreed workflow against customer needs, separately from technical import completion.

D Not here. This line belongs to turn 16, after Omar says: "What if the export is late but training is complete? Would we still describe the project as ready?" It addresses that point, not the missing turn in the supplied exchange.

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Review 1 / Explanations / continued

4. Rebuild the exchange from "The green score hides a workflow gap". Mei: "Let us begin with the supervisor group that reported the approver problem, then compare the same group after it is addressed." Daniel: [missing response] Mei: "Please keep the renewal discussion separate for now. I am describing a workflow problem, not announcing that we intend to leave." Which response belongs in the gap?

B. That gives us a defined cohort. We will record membership changes and keep the completion definition consistent, so a rise does not merely reflect a different population.

A Not here. This line belongs to turn 6, after Mei says: "Only eighty people have roles that require approvals. The other forty use different parts of the product." It addresses that point, not the missing turn in the supplied exchange.

B Correct. This is Daniel's response in turn 18. It connects Mei's preceding point with Mei's follow-up. A cohort supplies a consistent group for follow-up, with membership changes disclosed rather than hidden.

C Not here. This line belongs to turn 2, after Mei says: "The dashboard is green, but my supervisors are still chasing approvals by email. What is that green score actually telling us?" It addresses that point, not the missing turn in the supplied exchange.

D Not here. This line belongs to turn 12, after Mei says: "The supervisors say people return to email when they cannot identify the next approver. I do not yet know whether that is configuration or training." It addresses that point, not the missing turn in the supplied exchange.

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Review 2 / Explanations

Cumulative review

1. A colleague needs the term for this meaning: A customer account known to experience the issue. Which term fits?

D. affected account

A Not here. known limitation: A confirmed boundary on capability or effectiveness. The usual combination is "disclose known limitations".

B Not here. support case: A tracked customer request or problem report. The usual combination is "link the support case".

C Not here. mitigation: An action reducing impact or risk. The usual combination is "apply an approved mitigation".

D Correct. affected account: A customer account known to experience the issue. The usual combination is "identify affected accounts".

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2. A colleague needs the term for this meaning: Staff time made available for other work. Which term fits?

B. released capacity

A Not here. validation: Checking a claim or measure against appropriate evidence. The usual combination is "obtain customer validation".

B Correct. released capacity: Staff time made available for other work. The usual combination is "describe released capacity".

C Not here. ROI: Return on investment; net benefit relative to investment cost on a stated basis. The usual combination is "substantiate ROI".

D Not here. QBR: Quarterly business review; a periodic discussion of outcomes, priorities, and progress. The usual combination is "prepare a QBR".

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Review 2 / Explanations / continued

3. Rebuild the exchange from "The green score hides a workflow gap". Mei: "Before we act on thirty, I want to know what the system calls a completed approval. Could starting a request count?" Daniel: [missing response] Mei: "The supervisors say people return to email when they cannot identify the next approver. I do not yet know whether that is configuration or training." Which response belongs in the gap?

D. We should verify the event definition. A started request and a completed workflow are different events. We need to confirm that the recorded signal matches the action we are discussing.

A Not here. This line belongs to turn 12, after Mei says: "The supervisors say people return to email when they cannot identify the next approver. I do not yet know whether that is configuration or training." It addresses that point, not the missing turn in the supplied exchange.

B Not here. This line belongs to turn 20, after Mei says: "Please keep the renewal discussion separate for now. I am describing a workflow problem, not announcing that we intend to leave." It addresses that point, not the missing turn in the supplied exchange.

C Not here. This line belongs to turn 14, after Mei says: "Could the score include this workflow information? It is more relevant to our purchase than how often someone opens the homepage." It addresses that point, not the missing turn in the supplied exchange.

D Correct. This is Daniel's response in turn 10. It connects Mei's preceding point with Mei's follow-up. The event definition establishes what the recorded completion means; opening or starting a request may differ.

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Review 2 / Explanations / continued

4. Rebuild the exchange from "Replace the impressive ROI claim with a defensible value story". Joel: "I can validate the finance inputs, while our operations lead confirms the time records and what people actually do with the released hours." Kira: [missing response] Joel: "Please revise the slide before the business review. Keep the time difference, but remove the proven-return headline." Which response belongs in the gap?

D. Naming an outcome owner for each measure will help. Your finance validation and the operations evidence answer different questions, so neither should be substituted for the other.

A Not here. This line belongs to turn 8, after Joel says: "And the five-thousand-seven-hundred-sixty-dollar annual figure assumes that the same thing happens every month?" It addresses that point, not the missing turn in the supplied exchange.

B Not here. This line belongs to turn 4, after Joel says: "There were other process changes at the same time. We simplified the approval route as well as introducing the product." It addresses that point, not the missing turn in the supplied exchange.

C Not here. This line belongs to turn 16, after Joel says: "For the next review, let us measure the same reporting task across more cycles. Otherwise changes in the task itself could distort the comparison." It addresses that point, not the missing turn in the supplied exchange.

D Correct. This is Kira's response in turn 18. It connects Joel's preceding point with Joel's follow-up. The outcome owner confirms the relevant result; finance and operations can validate different parts of the evidence.

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Review 3 / Explanations

Cumulative review

1. A colleague needs the term for this meaning: The role coordinating or responsible for the renewal decision process. Which term fits?

D. renewal owner

A Not here. reorganization: A change in organizational structure, roles, or responsibilities. The usual combination is "understand reorganization effects".

B Not here. GRR: Gross revenue retention; retained starting recurring revenue excluding expansion on a defined basis. The usual combination is "calculate GRR".

C Not here. notice provision: A contract term concerning required notices and their conditions. The usual combination is "review notice provisions".

D Correct. renewal owner: The role coordinating or responsible for the renewal decision process. The usual combination is "identify the renewal owner".

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2. A colleague needs the term for this meaning: A license not currently allocated to a user. Which term fits?

B. unassigned seat

A Not here. expansion: Growth in business with an existing customer. The usual combination is "assess an expansion opportunity".

B Correct. unassigned seat: A license not currently allocated to a user. The usual combination is "verify unassigned seats".

C Not here. onboarding completion: Completion of defined preparation steps for a user or group. The usual combination is "verify onboarding completion".

D Not here. proration: Proportional charging for a partial period under stated rules. The usual combination is "explain proration".

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Review 3 / Explanations / continued

3. Rebuild the exchange from "Replace the impressive ROI claim with a defensible value story". Joel: "Nobody's pay has changed, and we have not reduced the team. The time may be useful, but it has not disappeared from our expenditure." Kira: [missing response] Joel: "We pay thirty-six hundred annually for the subscription. The implementation effort and training time are not fully in the model yet." Which response belongs in the gap?

A. Then released capacity is the relevant distinction. Staff may use the time for other work. Calling it a cash saving would imply a spending reduction that you have not reported.

A Correct. This is Kira's response in turn 10. It connects Joel's preceding point with Joel's follow-up. Released capacity makes time available for other work without necessarily lowering payroll or cash expenditure.

B Not here. This line belongs to turn 14, after Joel says: "I am not saying there is no value. The reporting cycle took less time. I want that useful result kept, without turning it into money we have not saved." It addresses that point, not the missing turn in the supplied exchange.

C Not here. This line belongs to turn 4, after Joel says: "There were other process changes at the same time. We simplified the approval route as well as introducing the product." It addresses that point, not the missing turn in the supplied exchange.

D Not here. This line belongs to turn 12, after Joel says: "We pay thirty-six hundred annually for the subscription. The implementation effort and training time are not fully in the model yet." It addresses that point, not the missing turn in the supplied exchange.

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Review 3 / Explanations / continued

4. Rebuild the exchange from "Check the existing capacity before selling more seats". Nora: "Once we know the right quantity, I will need a clear explanation of the term and any partial-period charge." Sam: [missing response] Nora: "Then the immediate decision is not buy twenty-five or buy nothing. It is establish what rights and preparation the team needs." Which response belongs in the gap?

C. Any commercial option should show those details, including the applicable charging basis. I will not invent a discount deadline or imply a new order is approved before your purchasing process is complete.

A Not here. This line belongs to turn 4, after Nora says: "They expect to use the same approval workflow. Does having thirty spare seats mean I can assign twenty-five immediately?" It addresses that point, not the missing turn in the supplied exchange.

B Not here. This line belongs to turn 20, after Nora says: "Then the immediate decision is not buy twenty-five or buy nothing. It is establish what rights and preparation the team needs." It addresses that point, not the missing turn in the supplied exchange.

C Correct. This is Sam's response in turn 18. It connects Nora's preceding point with Nora's follow-up. A commercial option should state the justified quantity, term, charges, and status rather than conceal assumptions.

D Not here. This line belongs to turn 8, after Nora says: "I also see that only thirty-five of our fifty assigned users have finished onboarding. I do not want the new group to repeat the same difficulties." It addresses that point, not the missing turn in the supplied exchange.

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Review 4 / Explanations

Cumulative review

1. A colleague needs the term for this meaning: A specific situation in which a capability would be used. Which term fits?

A. use case

A Correct. use case: A specific situation in which a capability would be used. The usual combination is "document the use case".

B Not here. acceptance criteria: Conditions used to judge whether a proposed solution meets the need. The usual combination is "define acceptance criteria".

C Not here. prioritization: Deciding the relative order or importance of work. The usual combination is "explain prioritization".

D Not here. audit trail: A traceable record of actions and decisions. The usual combination is "preserve the audit trail".

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2. A colleague needs the term for this meaning: Information that helps assess a claim or account. Which term fits?

D. supporting evidence

A Not here. expectation gap: A difference between what someone expected and what is currently understood or available. The usual combination is "address the expectation gap".

B Not here. compensation request: A request for money, credit, or another remedy. The usual combination is "route a compensation request".

C Not here. pause: A temporary interruption with its purpose and next route clarified. The usual combination is "explain a call pause".

D Correct. supporting evidence: Information that helps assess a claim or account. The usual combination is "request supporting evidence".

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Review 4 / Explanations / continued

3. Rebuild the exchange from "Check the existing capacity before selling more seats". Nora: "The new team has not confirmed who will attend training. Their manager asked for access before discussing the practical schedule." Sam: [missing response] Nora: "I can ask the manager. Would you still be willing to quote more seats if our existing rights do not cover that team?" Which response belongs in the gap?

C. That is a readiness gap separate from license quantity. Who will own their preparation, and when can the relevant users practice the workflow they actually need?

A Not here. This line belongs to turn 16, after Nora says: "Some teams have shared access in other systems. I assume that is not something we should improvise here." It addresses that point, not the missing turn in the supplied exchange.

B Not here. This line belongs to turn 14, after Nora says: "There is one difference in their workflow: an extra approval step. We have not checked whether our current configuration can handle it." It addresses that point, not the missing turn in the supplied exchange.

C Correct. This is Sam's response in turn 10. It connects Nora's preceding point with Nora's follow-up. Unconfirmed training attendance and ownership are readiness gaps even if enough valid licenses are available.

D Not here. This line belongs to turn 6, after Nora says: "I will involve our license owner. If those seats can be allocated, the remaining number would be five, correct?" It addresses that point, not the missing turn in the supplied exchange.

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Review 4 / Explanations / continued

4. Rebuild the exchange from "Repair the expectation without promising a date you cannot confirm". Beth: "Then summarize what you have understood so I can correct anything before the manager sees it." Idris: [missing response] Beth: "That captures it. I will send the presentation, and I expect the Thursday update even if the answer is not final." Which response belongs in the gap?

B. Here is the read-back: your team relied on an October expectation, incurred preparation effort, and wants the communication history, delivery status, and credit request reviewed. The available note is conditional, and you may provide another record.

A Not here. This line belongs to turn 14, after Beth says: "Fine. My concern is that nobody has taken ownership. What will actually happen next, and when will I hear from you?" It addresses that point, not the missing turn in the supplied exchange.

B Correct. This is Idris's response in turn 18. It connects Beth's preceding point with Beth's follow-up. The read-back checks the concern, impact, disputed evidence, and requested review with the customer before the handoff.

C Not here. This line belongs to turn 4, after Beth says: "The discussion was much more definite than that. I do not want you to use one note to dismiss everything we heard." It addresses that point, not the missing turn in the supplied exchange.

D Not here. This line belongs to turn 6, after Beth says: "I may have a presentation from the earlier meeting. I will send it through the customer support channel." It addresses that point, not the missing turn in the supplied exchange.

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Additional case 1 / Explanations

Extended conversation

1. starting cohort

Turn 2. The starting cohort is the ten accounts present at the beginning, with 100,000 annual recurring revenue; newly acquired accounts are outside this retention population.

2. Logo retention

Turn 4. Logo retention measures how many starting customer accounts remain; eight of the original ten is 80%, not eleven divided by ten after including new customers.

3. gross revenue retention

Turn 6. Gross revenue retention excludes expansion: (100,000 minus 20,000 churn minus 10,000 contraction) divided by 100,000 equals 70%.

4. net revenue retention

Turn 8. Net revenue retention includes the original cohort's expansion: (100,000 minus 20,000 minus 10,000 plus 35,000) divided by 100,000 equals 105%; new customers are excluded.

5. new-logo revenue

Turn 12. New-logo revenue is the 30,000 annual recurring revenue from three newly acquired accounts; it contributes to ending total ARR but not retention of the original cohort.

6. revenue bridge

Turn 14. The revenue bridge reconciles starting and ending recurring revenue through separate churn, contraction, expansion, and new-customer movements on a consistent basis.

[Return to the conversation, page 110](#)

Transfer exchange

1. 80

Director: Retention of the original accounts is 80 percent.

Turn 1. Sixteen of twenty original accounts remain, so logo retention is eighty percent; new customers do not enter that count.

Additional case 1 / Explanations / continued

2. 160

Analyst: Retained ARR before expansion is \$160 thousand.

Turn 2. Two hundred thousand less thirty thousand churn and ten thousand contraction leaves one hundred sixty thousand.

3. 90

Director: Net revenue retention is 90 percent.

Turn 3. Adding twenty thousand expansion gives one hundred eighty thousand from the original two-hundred-thousand cohort, or ninety percent.

4. 230

Analyst: Including new customers, ending ARR is \$230 thousand.

Turn 4. The original cohort's one hundred eighty thousand plus fifty thousand of new business totals two hundred thirty thousand.

[Return to the conversation, page 113](#)

Additional case 2 / Explanations

Extended conversation

1. co-termination

Turn 2. Co-termination aligns the added seats' end date with the existing subscription, here 31 December, rather than creating a new twelve-month term from 1 October.

2. proration basis

Turn 4. The proration basis in this fictional quote is whole months: 15 seats times 20 dollars times three months equals 900 before discount; other systems or contracts may use different timing rules.

3. discount scope

Turn 6. The discount scope is limited to the three-month addition; ten percent of 900 is 90, leaving 810 before tax, with existing charges unchanged.

4. service period

Turn 8. The service period is 1 October through 31 December for all fifteen added seats; the discounted charge does not shorten that stated period or renew it automatically in this exercise.

5. renewal illustration

Turn 10. The renewal illustration is a conditional comparison, not an approved renewal: 115 seats times 20 dollars times 12 months equals 27,600 before tax with no assumed discount.

6. renewal discount

Turn 14. A renewal discount would require its own applicable approval and terms; the limited discount on the current three-month addition cannot be silently carried into the next twelve-month term.

[Return to the conversation, page 115](#)

Transfer exchange

1. 1,200

Customer: Before discount, the addition costs \$1,200.

Turn 1. Twelve seats times twenty-five dollars times four months equals twelve hundred dollars.

Additional case 2 / Explanations / continued

2. 180

Manager: The discount amount is \$180.

Turn 2. Fifteen percent of twelve hundred equals one hundred eighty dollars.

3. 1,020

Customer: The resulting pre-tax amount is \$1,020.

Turn 3. Twelve hundred minus one hundred eighty equals one thousand twenty before tax.

4. co-termination

Manager: The shared end date is called co-termination.

Turn 4. Co-termination aligns subscription end dates; it does not by itself establish a discount for a later renewal.

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Additional case 3 / Explanations

Extended conversation

1. offboarding plan

Turn 2. The offboarding plan coordinates the agreed exit, including owners, export checks, access timing, and required follow-up; assistance is not made conditional on another retention discussion.

2. export scope

Turn 4. Export scope defines which data and file types are included; the records file alone is incomplete because attachments require a separate export in this fictional service.

3. record identifier

Turn 6. The record identifier links each exported attachment to its related record; preserving and checking that relationship is necessary for a usable handover, not merely a successful download.

4. authorized recipient

Turn 8. An authorized recipient is a person or party cleared to receive the specified data through approved arrangements; credential sharing does not establish that authorization or provide an acceptable transfer route.

5. access extension

Turn 10. An access extension changes the agreed availability period and requires approval; opening a support ticket does not automatically extend the 31 October, 18:00 UTC cutoff.

6. deletion confirmation

Turn 14. Deletion confirmation must describe the verified scope and status under the applicable agreement and law, including any relevant backup or retention treatment; access ending alone proves none of those actions.

[Return to the conversation, page 120](#)

Transfer exchange

1. attachments

Customer: The missing export contains attachments.

Turn 1. Receiving the records file does not satisfy the separately required attachment handover.

Additional case 3 / Explanations / continued

2. 16:00

Manager: Access still ends at 16:00 UTC on 20 June.

Turn 2. The stated cutoff remains in force because no extension has been approved.

3. extension

Customer: Opening a ticket does not approve an access extension.

Turn 3. A support request starts a review; it does not independently change the agreed access period.

4. unconfirmed

Manager: Deletion status remains unconfirmed.

Turn 4. Neither the records receipt nor the future access cutoff establishes that deletion has been completed.

[Return to the conversation, page 123](#)

Find a phrase by purpose

Onboarding and Implementation Expectations

Confirm the objective: Which workflow must the team be able to complete on launch day?

Qualify the date: Friday is the target, but readiness is not yet confirmed.

Name a dependency: The test import depends on an approved customer export.

[Full phrase bank, page 7](#)

Adoption Metrics and Health Scores

Acknowledge the signal: The login count shows broad access during this period.

Name the gap: It does not show that the approval workflow is being used.

Specify the period: These figures cover the last thirty days.

[Full phrase bank, page 19](#)

Support Escalations and Incident Communication

Acknowledge the impact: I understand that the missing reports are interrupting your daily review.

State the known scope: We have confirmed scheduled-export failures in eight EU-region accounts.

Keep the scope qualified: We are still checking whether other accounts are affected.

[Full phrase bank, page 32](#)

QBRs and Business Outcomes

Acknowledge the correction: You are right to distinguish the time logs from a proven financial return.

State the observation: The recorded cycle fell from forty staff hours to twenty-eight.

Calculate the difference: That is twelve fewer hours in the compared cycles.

[Full phrase bank, page 43](#)

Find a phrase by purpose / continued

Renewals and Churn Risk

Acknowledge the transition: I understand that responsibilities have changed since our last review.

Avoid inherited assumptions: I do not want to assume the previous priorities are still yours.

Give a factual handover: Earlier discussions focused on reducing the service backlog.

[Full phrase bank, page 58](#)

Expansion and Upsell Ethics

Explore the request: What work will the twenty-five new users need to complete?

Check current capacity: The account has thirty unassigned seats.

Qualify availability: We need the license owner to confirm that those seats can be allocated to this team.

[Full phrase bank, page 71](#)

Product Feedback and Feature Requests

Respect the idea: I understand why a bulk-approval button sounds useful.

Explore the sequence: Walk me through the repeated steps between two similar requests.

Identify the obstacle: Is the main effort navigation, comparison, or the decision itself?

[Full phrase bank, page 85](#)

Difficult Customers and Boundary Setting

Acknowledge the effect: I understand that your team planned around an October expectation.

Invite the evidence: Please share the message or meeting record you relied on.

State the available wording: The note says late October, subject to testing.

[Full phrase bank, page 97](#)

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acceptance criteria[Lesson 07, p. 84](#)**access extension**[Case 3, p. 119](#)**active user**[Lesson 02, p. 17](#)**adoption**[Lesson 02, p. 17](#)**affected account**[Lesson 03, p. 30](#)**annualization**[Lesson 04, p. 41](#)**assigned seat**[Lesson 06, p. 68](#)**audit trail**[Lesson 07, p. 83](#)**authorized recipient**[Case 3, p. 119](#)**benefit estimate**[Lesson 04, p. 41](#)**breadth of adoption**[Lesson 02, p. 17](#)**bulk action**[Lesson 07, p. 83](#)**cash saving**[Lesson 04, p. 41](#)**churn risk**[Lesson 05, p. 55](#)**cohort**[Lesson 02, p. 17](#)**commercial option**[Lesson 06, p. 69](#)**compensation request**[Lesson 08, p. 96](#)**concurrent-user license**[Lesson 06, p. 68](#)**confirmed commitment**[Lesson 08, p. 95](#)**confounding factor**[Lesson 04, p. 42](#)**continuity of support**[Lesson 08, p. 96](#)**cost base**[Lesson 04, p. 42](#)**acceptance criterion**[Lesson 01, p. 6](#)**acknowledgment**[Lesson 08, p. 95](#)**administrator**[Lesson 01, p. 6](#)**adoption barrier**[Lesson 02, p. 18](#)**allocation**[Lesson 06, p. 68](#)**ARR**[Lesson 05, p. 56](#)**attribution**[Lesson 04, p. 41](#)**authorization**[Lesson 07, p. 83](#)**baseline**[Lesson 04, p. 41](#)**boundary**[Lesson 08, p. 96](#)**budget owner**[Lesson 05, p. 55](#)**business outcome**[Lesson 04, p. 41](#)**champion**[Lesson 05, p. 55](#)**co-termination**[Lesson 06, p. 69, Case 2, p. 114](#)**commercial authority**[Lesson 08, p. 96](#)**comparison period**[Lesson 04, p. 41](#)**complaint escalation**[Lesson 08, p. 95](#)**conditional estimate**[Lesson 08, p. 95](#)**confirmed impact**[Lesson 03, p. 30](#)**contemporaneous note**[Lesson 08, p. 95](#)**contraction**[Lesson 05, p. 55](#)**cross-sell**[Lesson 06, p. 68](#)

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References and publication notes

All cases, organizations, figures, and conversations are fictional teaching material, not transcripts. Communication practice does not replace qualified advice or current workplace procedures.

[1] Gainsight. How Gainsight Redesigned the Customer Health Score for One of Its Products (2021).

Background on multidimensional account health. The book uses original fictional metrics, not a reproduction or endorsement of a proprietary scoring framework. Source checked 1 October 2026.

<https://www.gainsight.com/blog/how-gainsight-redesigned-the-customer-health-score-for-one-of-its-product/>

[2] Pendo. The Path to Increasing Product Adoption.

Background on usage, adoption, and retention terminology. All populations, calculations, and customer outcomes in the exercises are invented. Source checked 1 October 2026.

<https://www.pendo.io/resources/the-path-to-product-adoption/>

[3] Atlassian. Incident Communication Best Practices.

Background on communicating verified impact, status, and update timing. The incident and its approved workaround are fictional. Source checked 1 October 2026.

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[4] Atlassian. Agile Roadmaps: Build, Share, Use, and Evolve.

Background on communicating evolving product plans. Roadmap examples do not determine contractual obligations or promise real product availability. Source checked 1 October 2026.

<https://www.atlassian.com/agile/product-management/roadmaps>

Companion course

The website offers the eight-lesson course and related practice. This book can be used independently. No audio access or external account is needed for its exercises.

<https://englishladder.com/efsp-customer-success.html>

Build adoption. Explain value. Keep trust.

Eight customer conversations: agree a workable launch, interpret adoption, communicate an incident, validate value, plan a renewal, assess expansion, clarify a feature request, and repair a disputed expectation.

Onboarding and Implementation Expectations

A target date is not evidence of readiness. The four stated conditions are export approval, a successful test import, workflow acceptance, and administrator training. The Thursday review checks those conditions; holding the meeting alone does not satisfy them.

Support Escalations and Incident Communication

Eight confirmed accounts is the known scope, not proof that no others are affected. The manual route provides limited relief to administrators. It does not restore scheduling, establish the root cause, or justify saying the incident has been permanently resolved.

Adoption Metrics and Health Scores

Login activity is 100 divided by 120, approximately 83.3%. Relevant workflow completion is 30 divided by 80, or 37.5%. Thirty divided by 120 is 25%, but that answers a different question about all licensed users.

QBRs and Business Outcomes

The observed difference is 40 minus 28, or 12 hours. At the assumed \$40 per hour, that equals \$480 for a cycle. Multiplying by 12 gives \$5,760 only if the monthly frequency, repeated difference, and valuation assumptions hold.

Build adoption. Explain value. Keep trust. / continued

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