

CUSTOMER TRANSITION OPTIMIZATION

Executive readout

A portfolio-safe reconstruction of a large-scale legacy product migration



Resolution · friction · operations · churn

Somé Strategy Group

Portfolio artifact · 2026

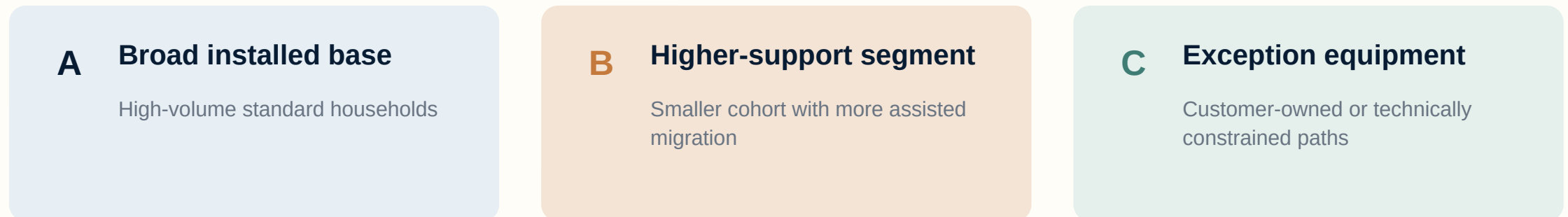
Sanitized reconstruction. Employer, market, device, and volume identifiers have been removed or amended; directional patterns and the documented resolution outcome are preserved.

PROGRAM ARCHITECTURE

One transition, three cohorts, one governed definition of resolution.

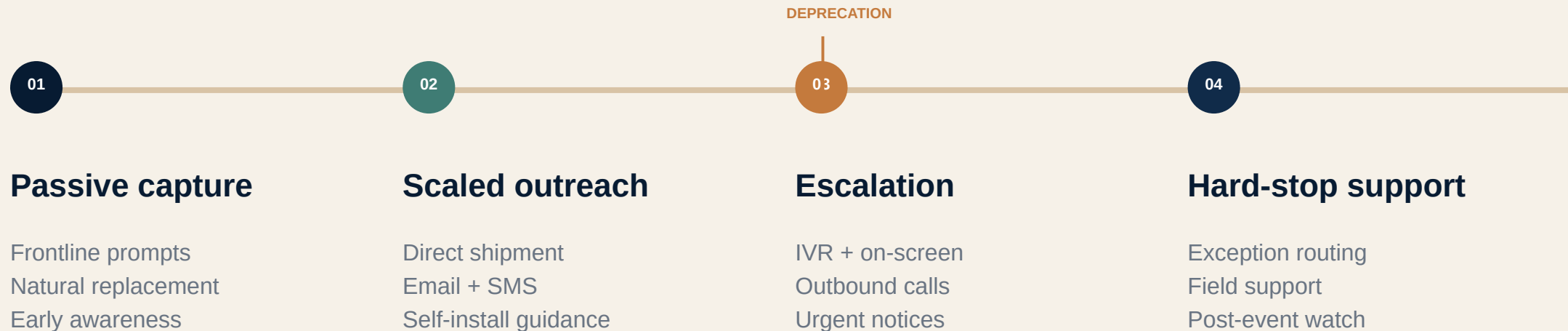


COHORT LOGIC



The operating reset replaced competing definitions of progress with one auditable population and one finish condition.

Customer treatments intensified as the deadline approached.

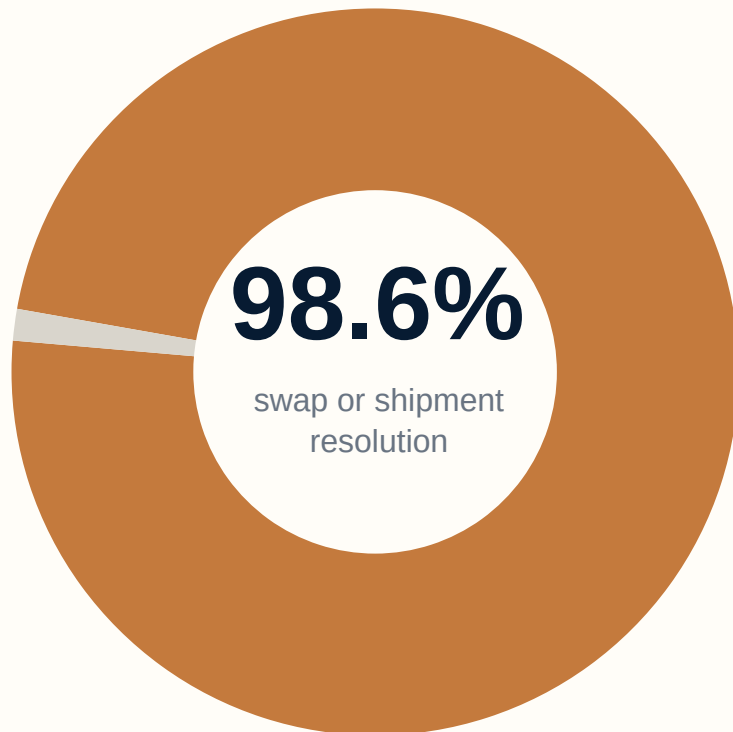


Design principle

Escalate the intervention - not the customer burden - while reserving scarce assisted capacity for true exceptions.

PRIMARY OUTCOME

The program reached 98.6% resolution across the targeted population.



What moved the number

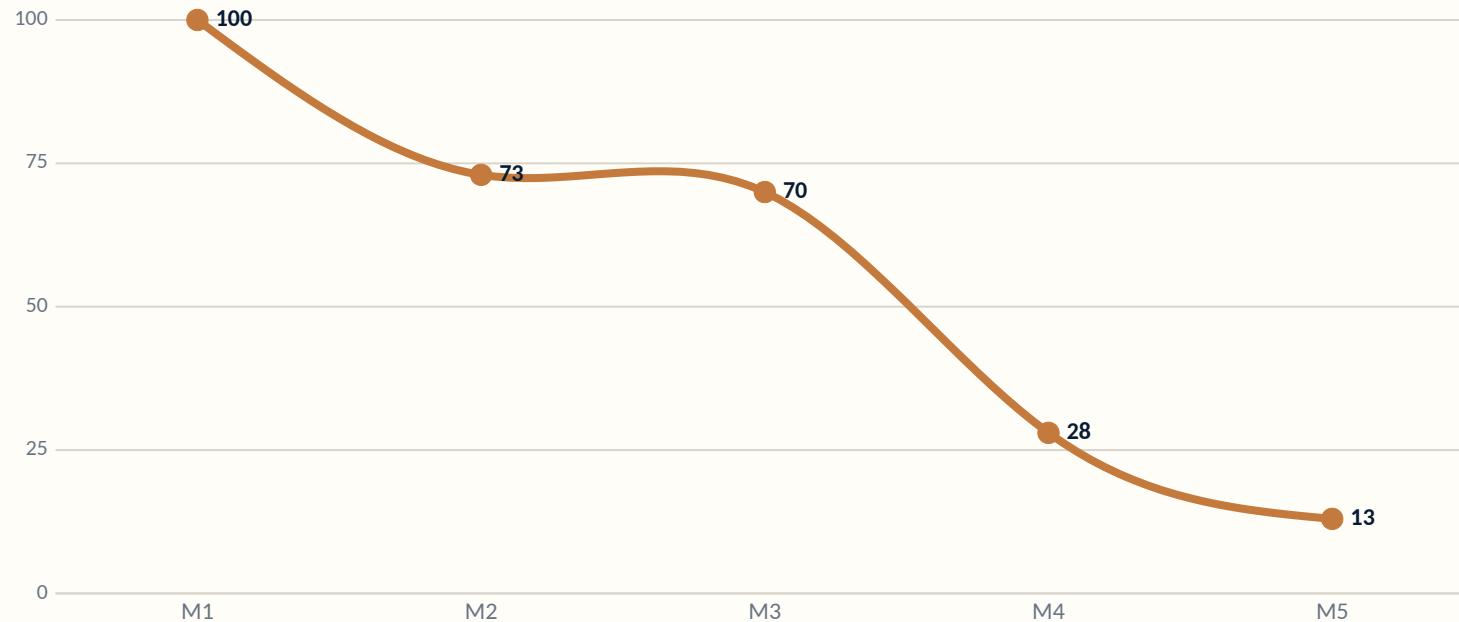
- 01 Audited the denominator**
Reconciled customer, device, and eligibility data before scaling activity.
- 02 Matched motion to cohort**
Separated direct-ship, self-install, frontline, and assisted paths.
- 03 Governed to exit criteria**
Tracked resolution, remaining exposure, calls, field demand, and churn.

Headline outcome retained; underlying population and device counts omitted.

CUSTOMER FRICTION

Contact demand fell sharply instead of spiking at deprecation.

Customer contacts · index (start month = 100)



87%

lower contact demand
by the end of the window

Readout

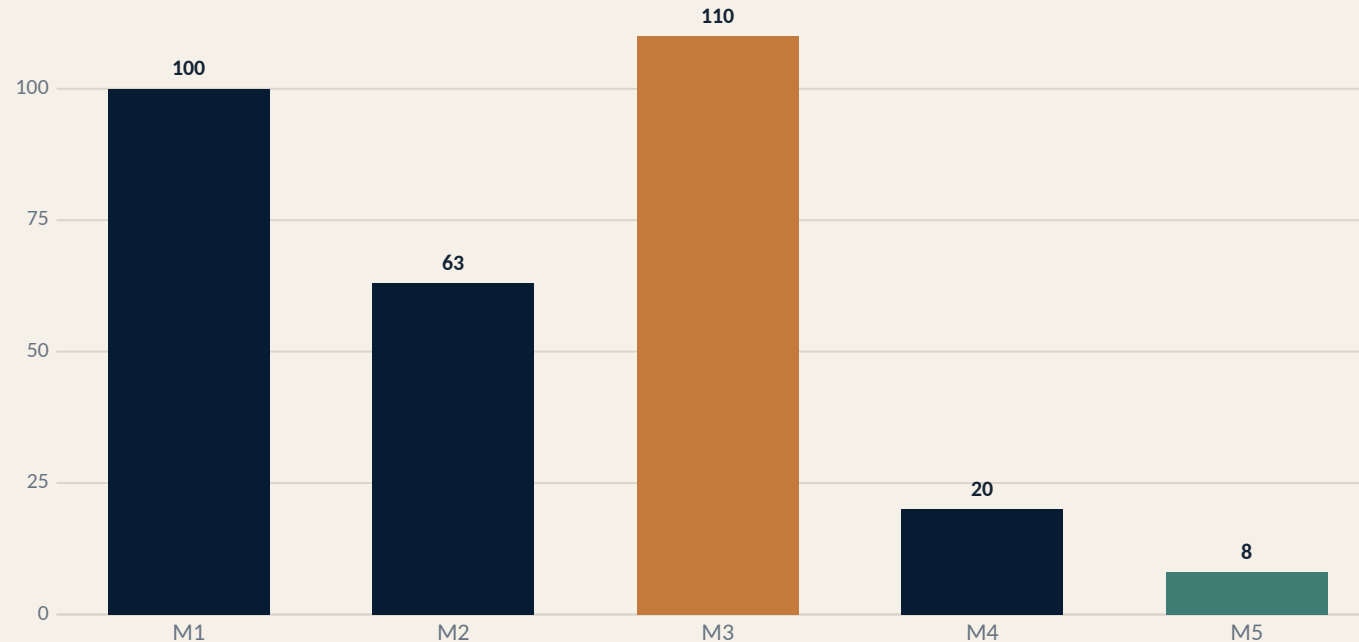
The deadline did not create the feared Care shock. Contacts declined as outreach, shipment, and exception handling matured.

Indexed values preserve the original trend while removing confidential call volumes and population denominators.

OPERATIONAL GUARDRAILS

Assisted resolution demand returned to a low exception level.

Technician-assisted resolutions · index (start month = 100)



Guardrail interpretation

Field demand

A brief mid-window peak cleared without sustained truck-roll growth.

Routing quality

Self-help and direct-shipment paths absorbed standard households.

Capacity protection

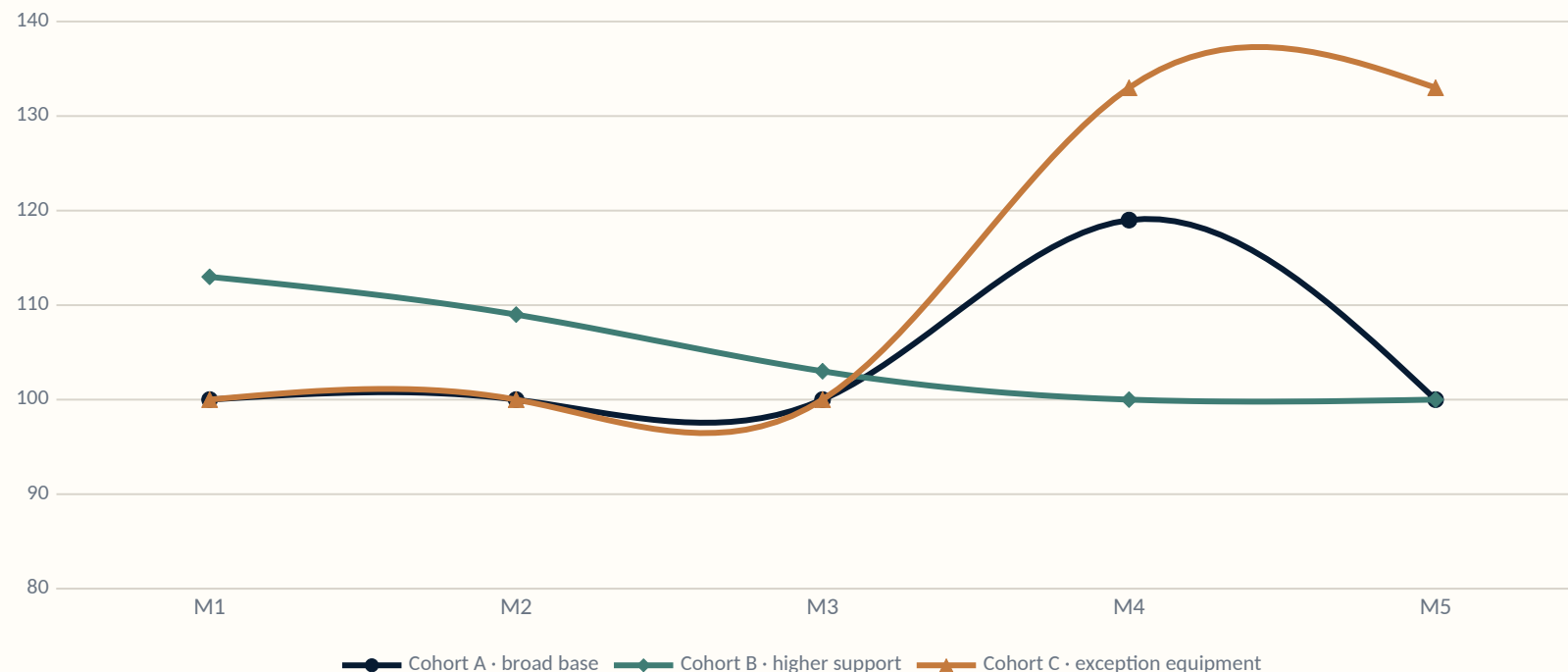
Assisted support stayed concentrated on complex exceptions.

92% below the starting-month index

CHURN GUARDRAIL

Broad-base churn held near normal; exceptions stayed on watch.

Disconnect rate · index versus each cohort's normal run rate (100 = baseline)



A + B

At or returning to normal by the end of the window

C

Small, specialized cohort showed a late increase; continue monitoring rather than over-generalize.

Normalized cohort views protect confidential rates while preserving pre/post interpretation.

EXECUTIVE DECISION

Keep the transition controlled until the last exceptions close.

01

Sustain the measurement

Keep one governed denominator and track installation, not shipment alone.

02

Close the exceptions

Maintain targeted outreach and assisted paths for unresolved households.

03

Watch the guardrails

Continue contact, field-demand, complaint, and churn monitoring by cohort.

TRANSFERABLE LESSON

A product migration is a conversion system: segment the population, remove friction, measure the desired behavior, and protect the guardrails that keep the business whole.