Introduction:

Congrats on reaching the case study stage of the interview process! Please prepare a presentation in Google Slides based on the case prompts below. Be sure to explain your thought process including any methodologies and assumptions. Please include the prompt text as dedicated slides, over the course of your presentation, to help give context to your audience.

Note there are no “wrong” answers. This is to evaluate your thinking when faced with business initiatives. While developing your presentation, if you believe your approach would benefit from additional context, please reach out with any questions or clarifications you require. We will review your responses (please share Google Slides and any supporting materials such as examples via Google Docs, calculations via Google Sheets etc). You may be asked to provide some clarification on your answers in the last stages of the interview process.

Context:

After starting with individual therapy in California, Road is looking to grow the business to serve more patients and providers in 2022. This includes expanding to new states, offering new products, and supporting new appointment types for therapy. Examples of recent state expansions are Georgia, Texas, North Carolina, and Illinois. For new products, we’re adding psychiatry. New patient relationships include adding support for families, couples, and minors. Each of these initiatives will involve fundamental changes to our Salesforce instance.

Key Questions:

- **Self-intro -** For those who haven’t had the chance to meet you yet, provide a quick overview on your background and why you’d be a killer addition to the Road team :)

- **Customer Data Model -** Road originally implemented Salesforce to support individuals seeking standard therapy appointments. This resulted in a data model in which a patient first enters Salesforce as a lead record and converts to a contact record only (i.e. no use of an Account or Opportunity). Lifecycle information is managed through a custom field on the contact. However, comprehensive care plans often require the need to service families or other relationship dynamics. How would you update our patient data model to represent relationships between patients? Examples might include parent/guardian, spouse, dependents/minors etc. How would you manage updating historical records for this new model? What steps would you take to avoid a major disruption to the core business during the transition?

- **Product Data Model** - Road originally implemented Salesforce to service a single product data model- namely one that enabled patients seeking appointments for individual therapy. As such, there is no reference to the concept of a product in Salesforce. Over the next few months, Road will be testing psychiatry appointments and may add additional healthcare products in the future. A therapy patient may or may not be interested in psychiatry and vice versa. How would you update Salesforce to represent multiple products in various combinations? Would you leverage additional objects such as opportunities or another custom object design? What challenges do you foresee in transitioning the business to your plan?

- **User Administration –** Road has grown at a rapid pace, increasing our base of Salesforce users from 60 to 275+ in the past 6 months. Due to adding new functions and layers within the organization, we need to update our role/profile schema and re-evaluatie permissions. Describe, in general, how you would evaluate, improve and implement updates to roles/profile and permissions. What steps would you take and what support would you need to roll out changes? What best practices would you leverage to future proof this new user schema?

- **Change Management & System Performance –** Today, Road works with a contracting house to make the majority of our updates to Salesforce. However, we also have internal employees with admin access that make some “business as usual” changes today. What development methods or best practices would you use to exercise proper control over updates to Salesforce (i.e. approach to using sandbox, communication, etc)? What approach or best practices would you leverage for testing? How would you monitor our Salesforce instance for unexpected outages during releases to production? How would you service reports of system outages on a day to day basis?