Customer Renewal
Best Practices

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Global Head, Customer Retention
SAP
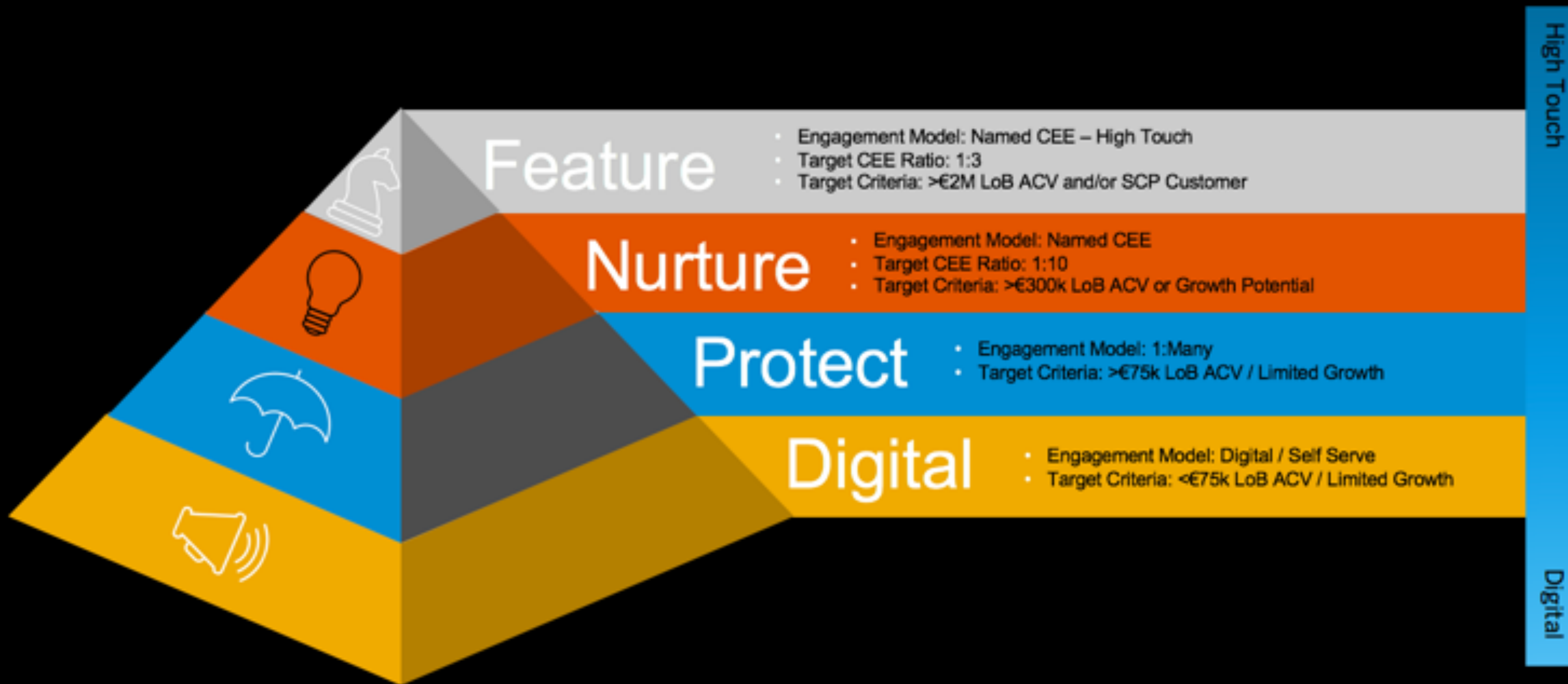
Customer Classifications
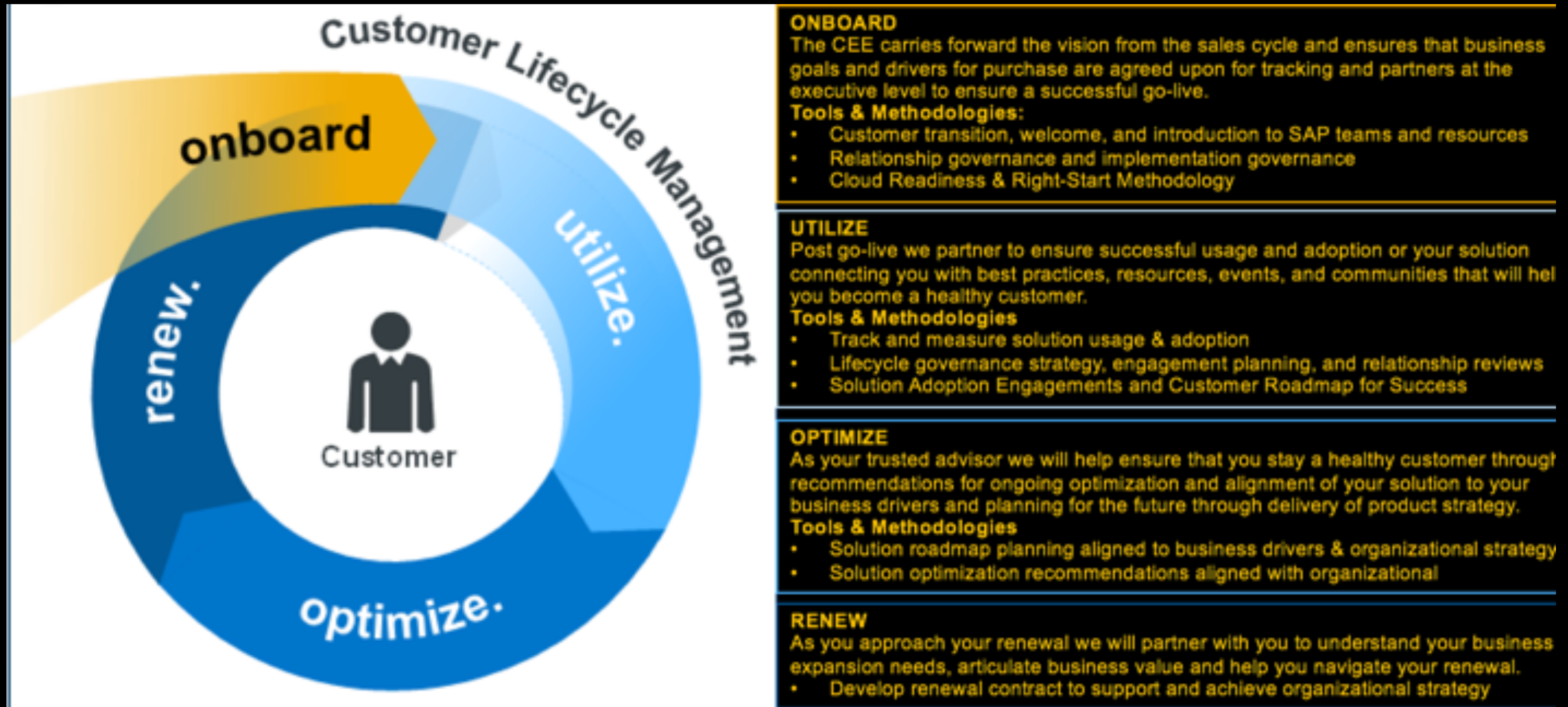
Same outcome Different Approach

Customer Engagement Classification Model

Engagement Engine vs Execution Engine

Customer Engagement Executive (CEE)

The Customer Engagement Executive is an executive level account manager with responsibility for customer retention and satisfaction. The CEE is the Voice of the Customer within SAP and partners proactively as a Trusted Advisor through the phases of the customer journey to help achieve adoption, optimization, and value realization of the investment in SAP

ONBOARD
The CEE carries forward the vision from the sales cycle and ensures that business goals and drivers for purchase are agreed upon for tracking and partners at the executive level to ensure a successful go-live.
Tools & Methodologies:
- Customer transition, welcome, and introduction to SAP teams and resources
- Relationship governance and implementation governance
- Cloud Readiness & Right-Start Methodology

UTILIZE
Post go-live we partner to ensure successful usage and adoption or your solution connecting you with best practices, resources, events, and communities that will hel you become a healthy customer.
Tools & Methodologies
- Track and measure solution usage & adoption
- Lifecycle governance strategy, engagement planning, and relationship reviews
- Solution Adoption Engagements and Customer Roadmap for Success

OPTIMIZE
As your trusted advisor we will help ensure that you stay a healthy customer throug recommendations for ongoing optimization and alignment of your solution to your business drivers and planning for the future through delivery of product strategy.
Tools & Methodologies
- Solution roadmap planning aligned to business drivers & organizational strategy
- Solution optimization recommendations aligned with organizational

RENEW
As you approach your renewal we will partner with you to understand your business expansion needs, articulate business value and help you navigate your renewal.
- Develop renewal contract to support and achieve organizational strategy

Customer Retention Executive (CRE)

Cloud negotiation expert that engages in an account 90-120 days prior to renewal with the purpose of driving renewal negotiation and timely execution across all account classifications. Drives upsell execution & lead gen at time of renewal.
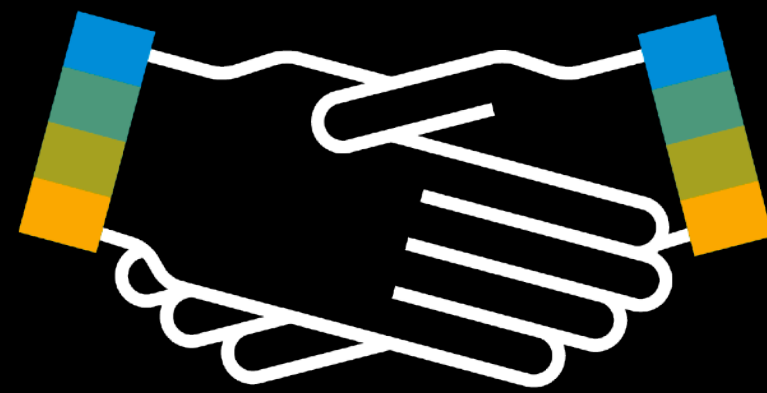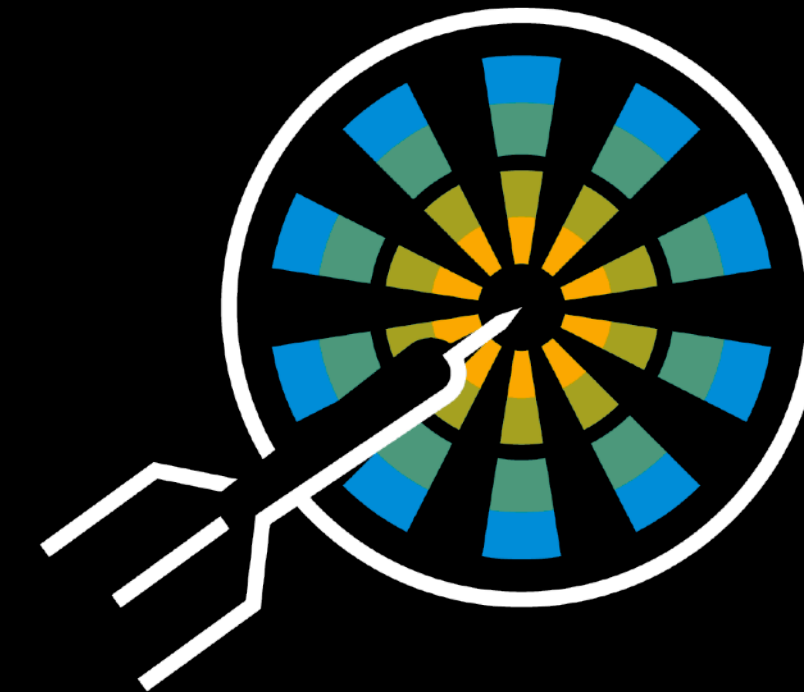
Partner

➢ Partner w/ Sales on upsell & cross sell

➢ Partner w/ CEE on renewal, account health & strategy

➢ Partner w/ ES on digital renewals

➢ Partner w/ Deal Support on Pricing

➢ Partner w/ Legal on contracting

Commercial

➢ Negotiate w/ customer on renewal

➢ Forecast accurate renewal

➢ Drives & executes upsell (addl users)

➢ Creates cross sell lead gen opportunities

Execution

➢ Secure executed renewal/upsell

➢ Ensure on time execution - CRITICAL

➢ Ensure Renewal Booking

➢ Maintain CRM Data

Customer Renewal Specialist (CRS)

Shared Services resource that provides transactional & administrative support, managing the non-customer facing aspects of the renewal process, generally within CRM. Provides transactional support to sales for upsell tied to renewal. Maintains oversight on Digital (auto-renew) bookings accuracy & completion, to include compliance & lead gen in the digital space.
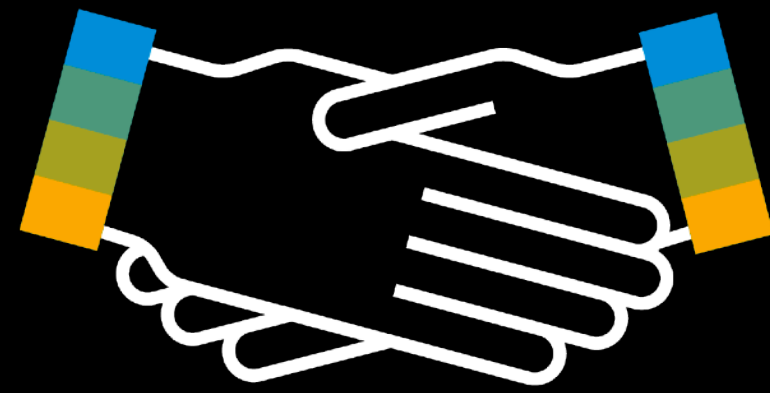
Partner

➢ Partner w/ Sales on creation of replacement & upsell/renewal quotes

➢ Partner w/ CEE & CRE on creation of renewal quotes

➢ Partner w/ CRM Support to clear quote issues

➢ Partner w/ O2I to ensure digital bookings

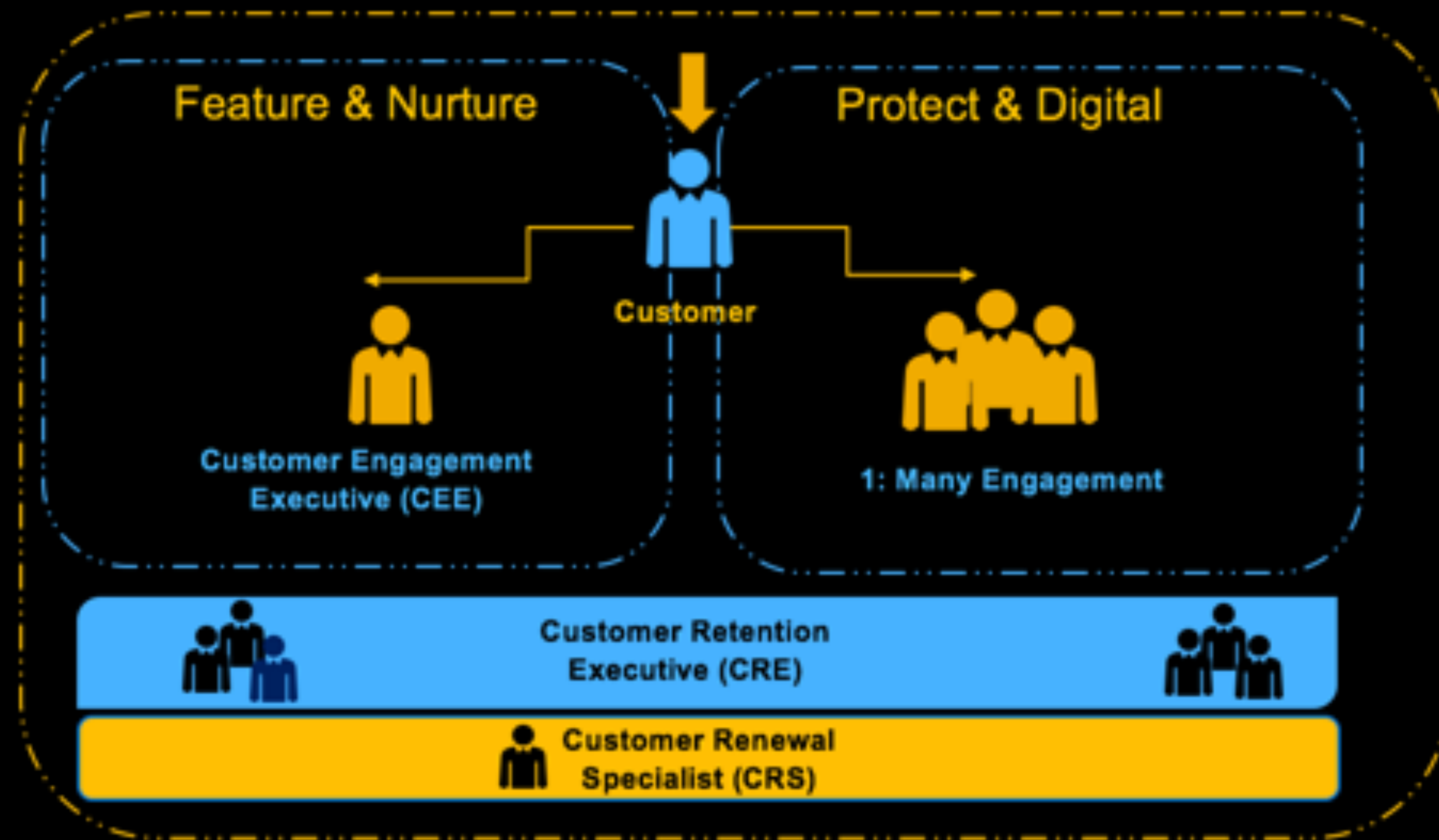➢ Partner w/ Lead Gen team on compliance in digital space

Support

➢ Create replacement quotes

➢ Create Early Renewal + Upsell quotes

➢ Create Renewal quotes

➢ Identifies overage & non payment issues.

➢ Maintains product conversions

➢ Ensures all DGTL renewals are auto-renewed, invoiced & booked.

Engagement & Retention Delivery Model

Achieving an enhanced **Customer** experience to promote….

- ✓ Customer Adoption
- ✓ Customer Retention
- ✓ Revenue Retention
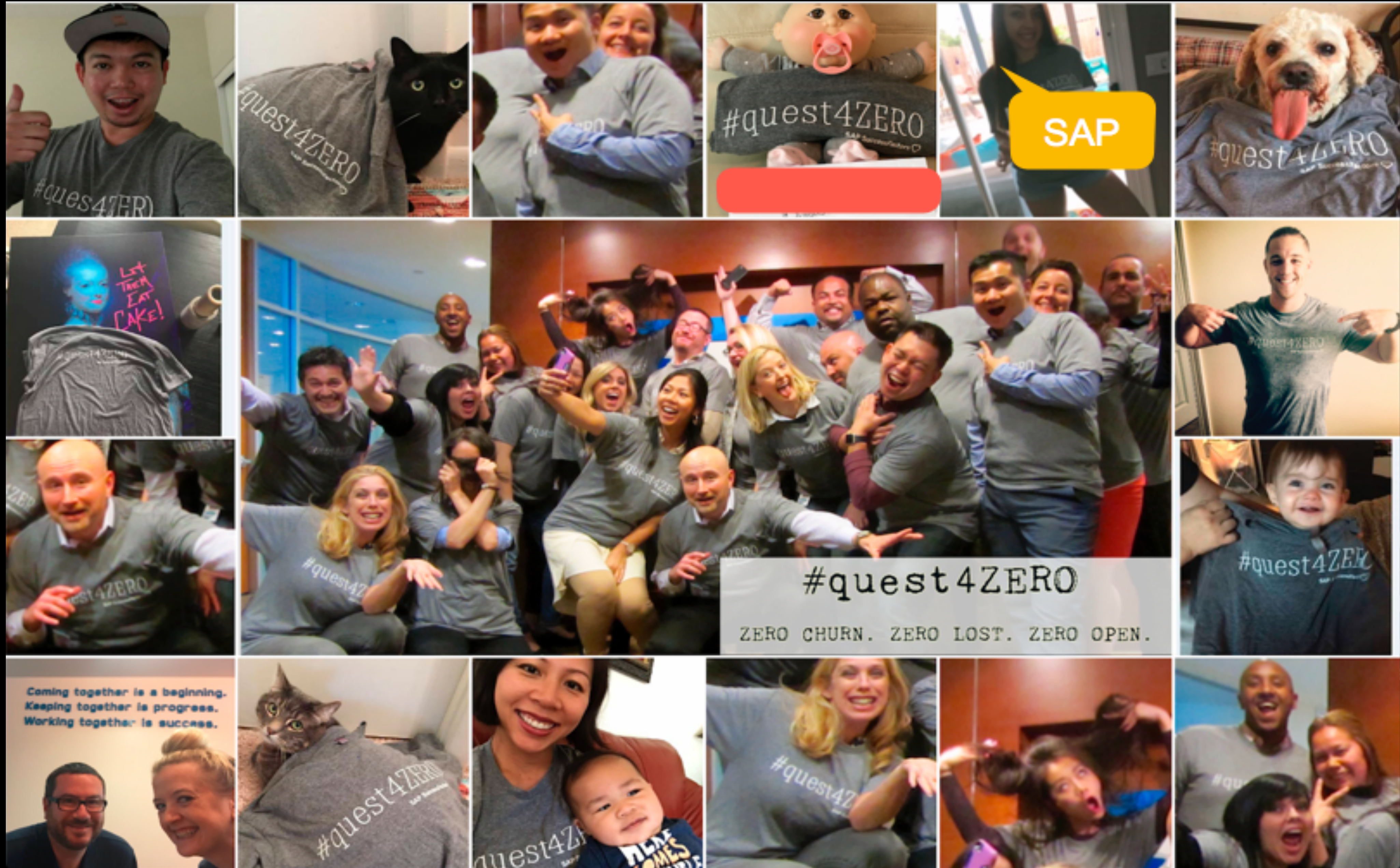- ✓ Expansion & Growth
- ✓ Reference-ability
- ✓ Customer Satisfaction

Feature & Nurture

Protect & Digital

Customer

Customer Engagement Executive (CEE)

1: Many Engagement

Customer Retention Executive (CRE)

Customer Renewal Specialist (CRS)

SAP Cloud Renewal Center

Mission #quest4ZERO

ZERO OPEN. ZERO LOST. ZERO CHURN.

Deploying a world class center led renewal organization by executing & delivering renewal solutions & services for our internal cloud business', external customers & SAP.