CUSTOMER SUCCESS LEADERSHIP BOOTCAMP

Customer Goals - How to Identify, Track and Achieve Them

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VP of Customer Success
ClientSuccess

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1PM EST/ 10AM PST

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Setting Goals is the First Step ...

Goal - /gōl/

the object of a person's ambition or effort; **an aim or desired result.**

DESIGNING GOALS WITH YOUR CUSTOMERS

1.

Start with a conversation focused on goal setting

2.

Help them understand what's possible with your solution

3.

Make sure to set SMART goals

4.

Design a plan to achieve these goals

5.

A tracking mechanism

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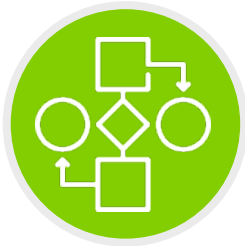
BUSINESS OBJECTIVES FOR CLIENTSUCCESS

There are 7 main business objectives that will propel a company to purchase a Customer Success Management solution

DEMOCRATIZE DATA
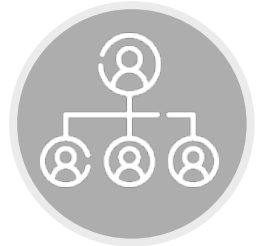
OPERATIONALIZE PROCESS

DRIVE EFFICIENCY

MITIGATE RISK

IDENTIFY GROWTH

INCREASE VISIBILITY

SCALE WITH EASE

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SETTING SMART GOALS

MEASURABLE

How will you know when you've achieved it?

RELEVANT

On a scale of 1-10, how meaningful is this goal to you?

S **M** **A** **R** **T**

SPECIFIC

What outcome would you like to achieve?

ATTAINABLE

On a scale of 1-10, how confident are you that you will achieve this goal?

TIME BASED

When do you plan to achieve this goal by?

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CREATING A SUCCESS PLAN

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Date:	
Customer Name:	
Prepared By:	
Approved By:	
Target Date:	

GOALS

Objective 1:	
Objective 2:	
Objective 3:	

SUCCESS PLAN

Objective 1: Name of the business objective

KEY RESULT	DETAILS	OWNER	STATUS	DUE DATE	NOTES
Sample Key Result	Provide the details of this task so it's clear what is expected with this item	Owner Name	In Progress	4/2/22	You can use this field to add notes about the project as you continue to work on this.
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Objective 2: Name of the business objective

KEY RESULT	DETAILS	OWNER	STATUS	DUE DATE	NOTES
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Objective 3: Name of the business objective

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METRICS

	Metric Target	Metric Achieved
Metric 1:	Increase [X] by [Y] % by [DATE]	Increased [X] by [Y] % - Goal Achieved
Metric 2:	Increase [X] by [Y] % by [DATE]	Increased [X] by [Y] % - Goal Achieved
Metric 3:	Increase [X] by [Y] % by [DATE]	Increased [X] by [Y] % - Goal Achieved

TRACK YOUR CUSTOMER'S GOALS

◎ Goals   ＋ ▭

Active   History

# ↑	NAME ↑	ACTUAL/TARGET	PERIOD ↑	STAGE ↑	PROGRESS ↑	LATEST COMMENT
1	**Increase NRR by 20%** Increase Net Recurring Revenue each quart...	84.00% / 100.00%	**2021** Jan 01 - Dec 31	● In Progress	▰▰▰▰▰▰▱ On Track - Ended 10 days ago	We started off Q1 really well and have had some challenges due to Covid 19.
2	**Reduce Churned Accounts by ...** Reduce Churned Accounts by 15% in Q3	98.00% / 100.00%	**Q3 2021** Jul 01 - Sep 30	● Complete	▰▰▰▰▰▰▰ On Track - Ended 102 days ago	The team saved two additional customers who were at high risk and got them to renew for 2 ...
3	**Increase Customer Satisfaction...** Increase our NPS score by 20 points in 2021	20.00% / 100.00%	**Q4 2021** Oct 01 - Dec 31	● In Progress	▰▱▱▱▱▱▱ Critical - Ended 10 days ago	We have increased NPS by 10 points, but need to launch the new product in order to achiev...

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TRACKING YOUR CUSTOMER'S GOALS

◎ **Goals**   ＋ ◻

Active   History

◀ Increase NRR by 20%   ⋮

① Actual/Target   Period   Stage   Progress
   84% / 100%   **2021** ⌄   🟡 **In Progress** ⌄   [████████████████████ 84%]
                                                                   On Track - Ended 10 days ago

GOAL   **COMMENTS**

Increase NRR by 20%   🖼 Add comment...

DESCRIPTION   62/1000

Increase Net Recurring Revenue each quarter by 5% each quarter   **JD Nyland** *Sep 28, 2021, 12:54 PM*

                                                           We started off Q1 really well and have had some challenges
                                                           due to Covid 19.

ACTUAL

84% ⌄

LAST UPDATED

JD NYLAND created goal on a 09/28/2021
DAVE BLAKE modified goal on a 12/21/2021

NO PLATFORM, NO WORRIES

	Goal Name	Actual	Target	Period	Dates	Stage	Progress	Latest Comment	Owner
1)	Increase NRR by 20%	84%	100%	Q1 2022	January - March	In Progress	On Track	Provide an update on the status on a weekly basis	Kristi Faltorusso
2)	Reduce churn accounts by 15%	25%	100%	Q1 2022	January - March	In Progress	Behind	Provide an update on the status on a weekly basis	Kristi Faltorusso
3)	Increase customer satisfaction by 20 points	0%	100%	Q2 2022	April - June	Not Started	Not Started	Provide an update on the status on a weekly basis	Kristi Faltorusso

GETTING TO GOALS

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What goals do you have for our solution?	Ok, well what will you do with the customer health score?	Great, what will you do once you've identified your at-risk customers?	Ok, and what will happen if you get your customers back on track?	And what will happen if you reduce your customer churn?
I want to create a customer health score.	It will allow me to see which of my customers are at risk.	We'll be able to intervene and work to get them back on track.	We will be able to reduce our customer churn.	We will improve our GRR and NRR.

GOAL: Improve GRR by 3% over the next 6 months, and NRR by 5% over the next 12 months.

THANK YOU