

CUSTOMER SUCCESS LEADERSHIP BOOTCAMP

# DESIGNING AN AUDIT PROCESS FOR YOUR CUSTOMERS TO MAXIMIZE VALUE



**KRISTI FALTORUSSO**

Chief Customer Officer  
ClientSuccess

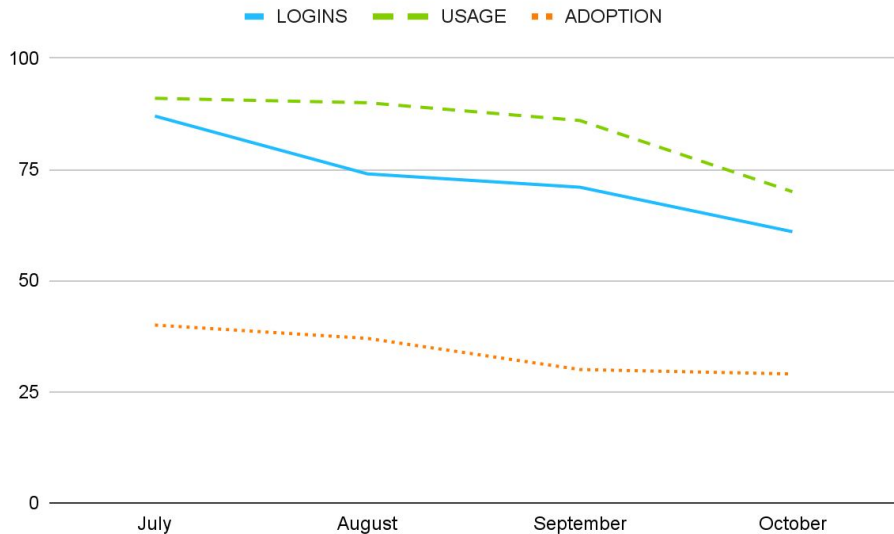
TUESDAY, NOVEMBER 1, 2022  
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client**success**

IF YOUR CUSTOMERS  
AREN'T USING YOUR  
SOLUTION, THEY'RE NOT  
ACHIEVING THEIR GOALS.

# WHAT IS YOUR CUSTOMER DATA STORY?



## LOGINS

Is your platform one that requires daily/weekly/monthly logins to achieve success?



## USAGE

Are you clear on your customers use cases and does their platform use indicate they are using it effectively?



## ADOPTION

Are your customers using the parts of the solution that correlate back to their business goals?

# HOW COULD WE SOLVE THIS PROBLEM?

## REVIEW

We had to review their current deployment to understand how it was currently set up?



1

2

## EDUCATE

We had to educate them on how to optimize their use to reflect best practices.



3

4



## RECOMMEND

We would need to compare what they are doing to best practices and successful customers to recommend a better approach.



## EXECUTE

We would need to design a plan with our customer to make the changes and optimize their deployment.

# INTRODUCING THE 30 POINT INSPECTION

## #1 Complete 360 Degree View of the Customer in ClientSuccess

Criteria	Score	Findings
All existing clients are in CS and new clients are immediately and automatically added		
Key success criteria is captured for each client		
All engagement, meeting notes, phone calls, and follow-up tasks with client contacts are captured in CS to manage customer interactions		
Active and historical subscriptions and revenue are available for each client and automatically imported into CS		
Key customer usage metrics that indicate level of adoption are regularly and automatically updated for each client		
Client sentiment is integrated into CS and kept current		
Customer support tickets are integrated into CS		

Total Category Score	
Max Score	Your Score
35	

## YOUR SCORECARD

CATEGORY	SCORE
#1 Complete 360 Degree View of the Customer in ClientSuccess	
#2 Complete, Up-to-Date, and Directional Picture of Customer Health	
#3 Well Defined Processes with Robust Management and Measurement at Key Moments in the Customer Lifecycle	
#4 Accurate view of current revenue and Predictable view of future revenue	
#5 Automation Configured for Key Notifications and Emails to Drive Efficiency and Enhance Experience	
#6 We are instilling a customer-centric organization by communicating regularly across our company	
#7 Foundation for Success in the Customer Success Management Team	
TOTAL SCORE	PERCENTAGE

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## RECOMMENDATIONS

TOP RECOMMENDATIONS

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# WHAT DID THE 30 PI INCLUDE?



## SUMMARY

We open the document with an overview of what the 30PI is, how to use it and what they can expect.



## SCORECARD

Ratings summary page to see how you score overall for each core use case.



## USE CASE REVIEWS

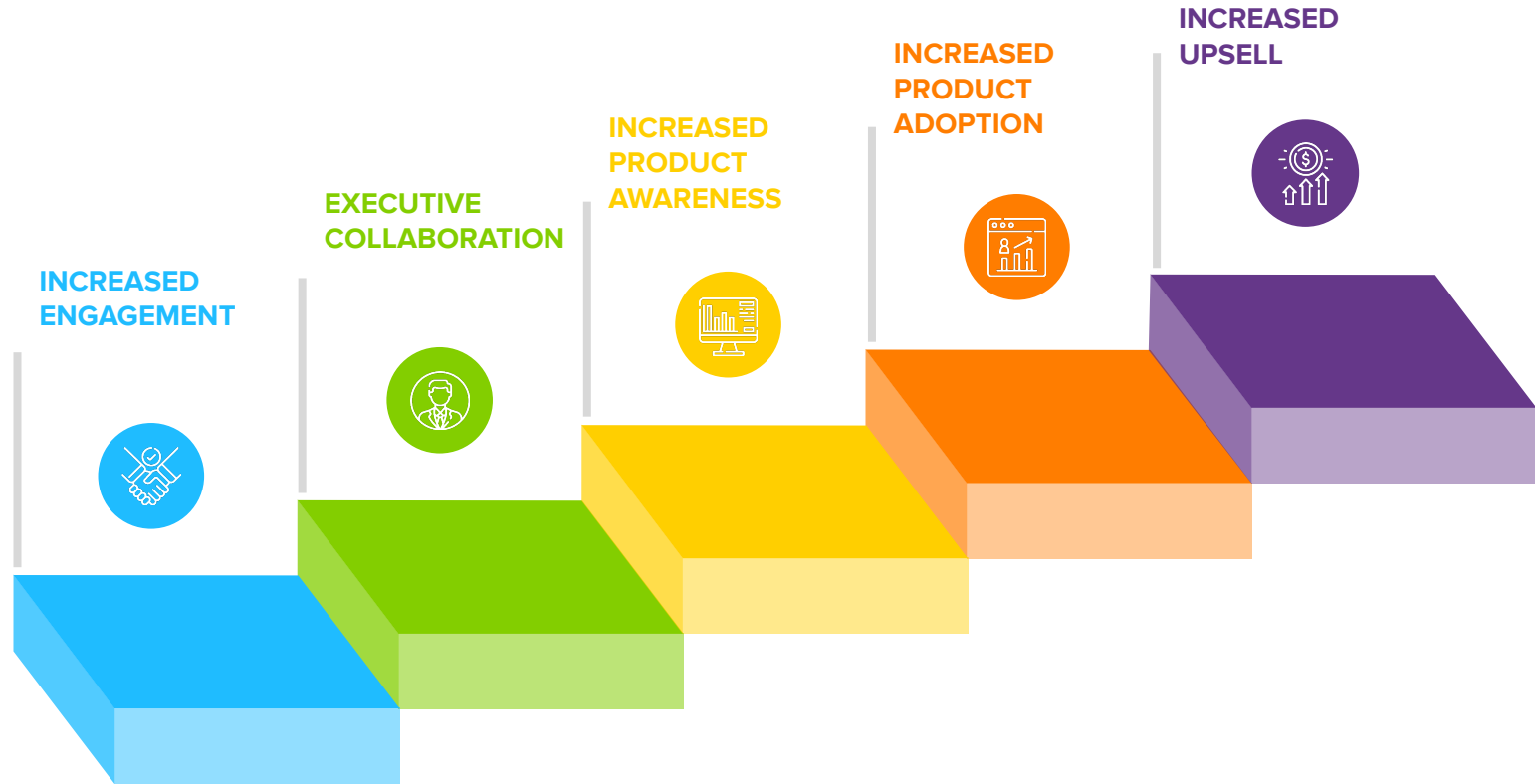
It includes 7 unique pages that directly correlate to major platform use cases that go deep into the deployment.



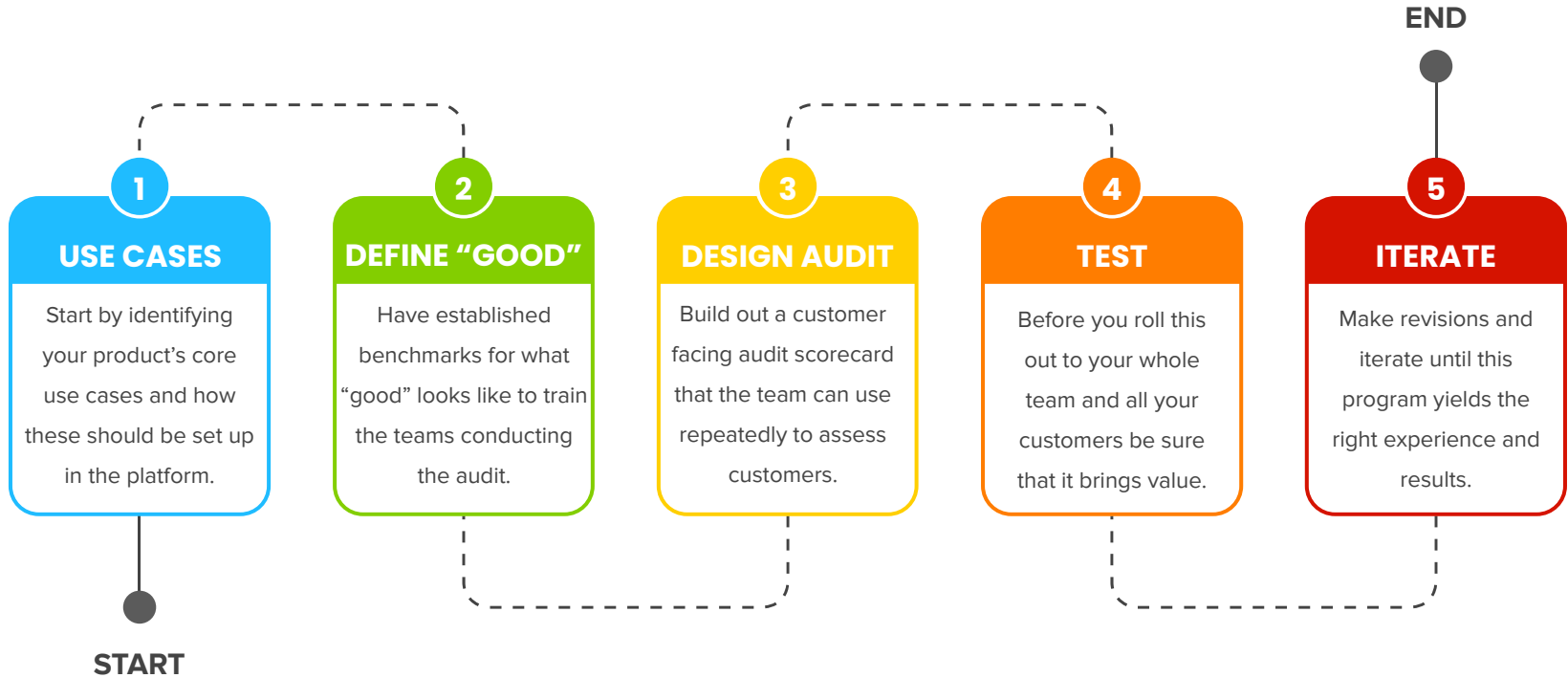
## RECOMMENDATIONS

Detailed recommendations that are outlined to give you the biggest bang for your buck.

# IMPACT OF OUR EFFORTS



# BUILDING YOUR OWN AUDIT PROCESS





# AUDIT MISTAKES TO AVOID

**1.**

**DON'T FORGET TO MAKE IT EASY AND REPEATABLE**

**2.**

**DON'T JUST SEND IT OFF TO YOUR CUSTOMERS USE THIS TO HAVE A STRATEGIC DISCUSSION**

**3.**

**THE AUDIT ISN'T THE IMPORTANT PART IT'S WHAT THEY DO WITH IT THAT MATTERS**

**4.**

**DON'T FORGET TO TRACK THE IMPACT; AFTER THE AUDIT IS PRESENTED ARE METRICS SLOWLY IMPROVING**

**5.**

**DON'T FORCE YOUR CUSTOMER TO WORK ON THINGS THAT ARE NOT A PRIORITY FOR THEM**

THANK YOU