

CUSTOMER SUCCESS WEBINAR SERIES:

Leveraging AirDeck to Enhance Your Onboarding Program



Jason Weaver
Founder & CEO
AirDeck



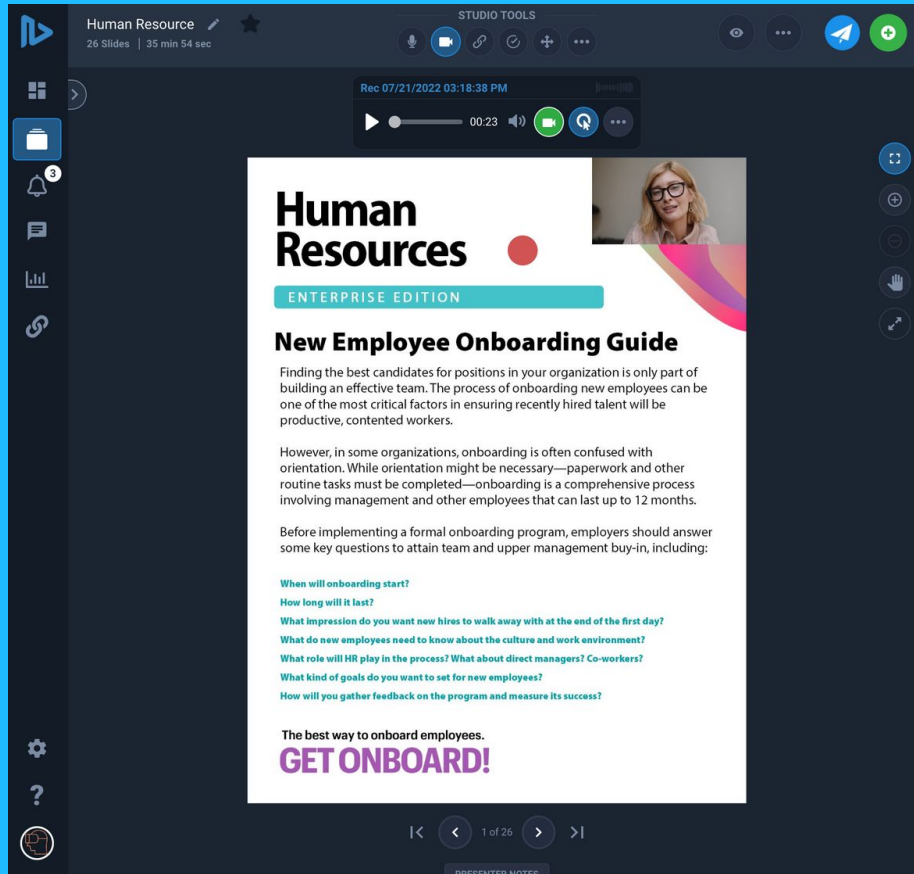
Kristi Faltorusso
Chief Customer Officer
ClientSuccess

Thu, Mar. 23rd @ 1:00 PM EST / 10:00 AM PST

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What is AirDeck?

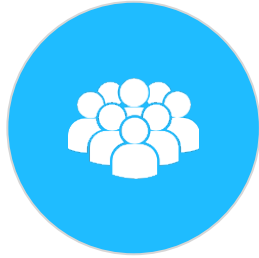
What is AirDeck?



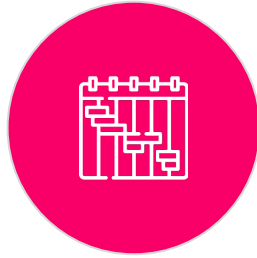
Anytime you need to explain a document ... AirDeck

Easily add audio or video to any document and transform it into an experience. Add new levels of personalization and clarity, share asynchronously with custom links, and track engagement with powerful analytics.

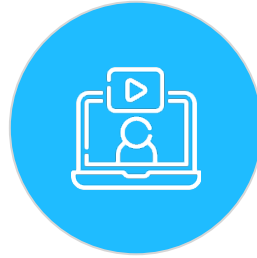
WHY DID WE CONSIDER USING AIRDECK AT CLIENTSUCCESS?



Supports the
Ability to Scale



Accelerate
Onboarding
timeline



Asynchronous
Communication



Analytics and
Insights



Improve
Training and
Enablement

AIRDECK FOR ONBOARDING

**PARTNERSHIP
KICKOFF
MEETING**

01

**ONBOARDING
AUDIT**

03

**JOURNEY
STAGE
ALIGNMENT**

05

02

**ONBOARDING
FOLLOW UP
1-PAGERS**

04

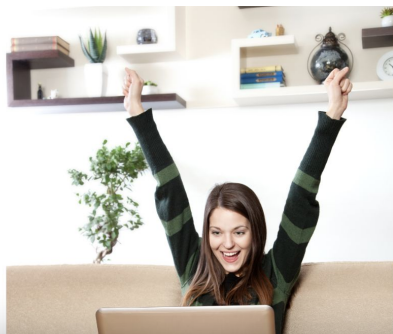
**POST
ONBOARDING
REVIEW**

PARTNERSHIP KICK OFF

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WELCOME TO CLIENTSUCCESS.

At ClientSuccess our goals are simple, help our customers design and execute a comprehensive Customer Success program that will help their teams drive more value for their customers over time. We believe that with the proper visibility, execution and alignment companies are empowered above and beyond as they ensure delivery for their customers.



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ALIGNING ON EXPECTATIONS.

01

ENGAGEMENT

Onboarding will meet once a week and then the ongoing cadence of engagement is typically monthly; will you be able to commit to this frequency?

03

SUCCESS

What will success look like at the end of our initial partnership term? What actions or metrics will you use to determine that we've been successful?

05

INVOLVEMENT

How involved will everyone be throughout the lifecycle of the partnership?

02

COMMUNICATION

Aside from email, what would be the next best way to reach you if we are trying to connect?

04

PRIORITY

Where does this project/partnership and its success rank on your list of priorities?

06

ESCALATION


How should we escalate should we lose momentum or engagement in the partnership?

- Easy to send the kickoff deck in advance to reduce the need for a lot of back and forth
- Ability to review analytics to understand content engagement in advance of the meeting
- Send time getting to the important aspects of the discussion - Goal Setting


Outcome: Reduced meeting time 60 > 30 minutes; time to focus on goal identification; better customer experience

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ONBOARDING 1-PAGER FOLLOW UP



Stage 2: Customer Management



Congratulations, you have completed Stage 2 of the ClientSuccess Onboarding Process. Stage 2 focuses on Customer Management and setting up things like customer segmentation, custom fields, tag management, task management and more.

Below is a list of items the team completed this week:

Task	Objective	Status
Customer Type (Customer Segment)	Configure your customer types in accordance with how you group your customers.	
Custom Fields	In addition to the fields you are pulling over from your CRM consider adding additional fields that you want manually or automatically populated to provide the most complete customer insights.	
Task Management	Create a manual task from the Task screen, create a Task from the Customer Page, assign a task to someone else, change the task status, adjust the task filters	
Tag Management	Review the ability to add tags to engagements and create, modify and merge tags in Global Settings	

We recommend to start using these areas to get acclimated and familiar with how to use these part of the platform in your workflow.

Stage 2 Success Outcome

Congratulations, you now have all of your customers segmented in accordance with your business, have added the appropriate custom fields to manage data, and can now start tracking your engagements with your customer.

- Easy way to keep the entire team aware of what we're completing in onboarding
- Highlights work that's not completed to draw attention to setbacks and timeline risk
- Celebrates the outcomes that the team has seen - continues to reinforce value outcomes

Outcome: Reduces risk in onboarding of work not being completed; Regular communication with Executive Stakeholders; Value realization

ONBOARDING AUDIT

#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		

To
Max Soc
35

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

- Outline for the customer how their current deployment stacks up against best practices
- Provides the customer with a roadmap to work off of to let them know how they should be spending their time as they evolve

Outcome: Uncovers areas of opportunity; provides a prescriptive roadmap of what they need to do next; focuses on accountability

ONBOARDING WRAP UP

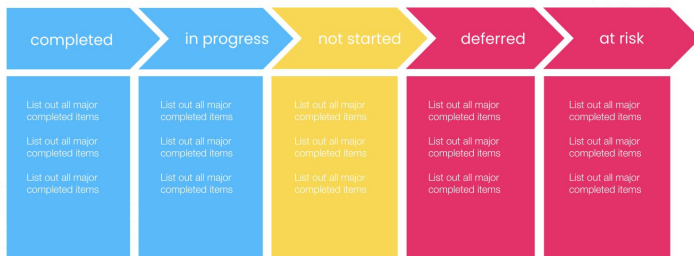
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WHERE ARE WE IN THE PARTNERSHIP?

The customer lifecycle at ClientSuccess is broken down into 3 core stages - enablement, adoption and advocacy. Each phase has a clear objective that centers around the customer and their partnership needs. Enablement is focused on effective platform configuration and training; setting you up to leverage the platform in accordance with your goals. Adoption focuses on the ongoing use and optimization of the platform to ensure long term success as well as adoption and expansion into new and unused areas of the platform. Lastly advocacy is intended to illuminate the success we've had through renewal, growth and advocacy opportunities. Where are you in the ClientSuccess lifecycle?

PROGRESS TO DATE.



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- Partnership alignment on how onboarding went - what went well, where we have gaps or room to review
- Engages Executives to keep them aware of what has been completed and what still needs work
- Sets expectations and allows us to formally wrap up onboarding

Outcome: Executive Alignment; Sets the stage for next steps; formally highlight successes

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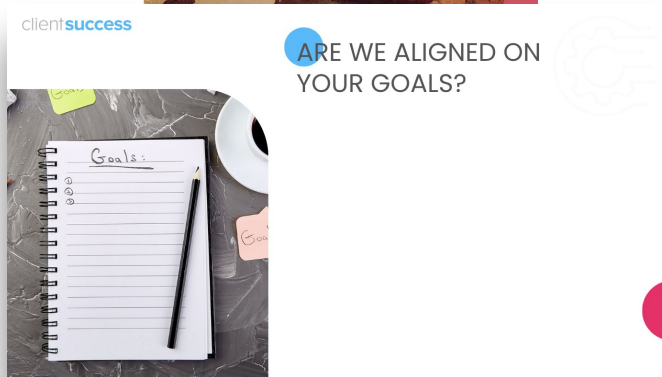
JOURNEY STAGE ALIGNMENT

WHAT TO EXPECT IN THE ADOPTION STAGE

- Monthly cadence of engagement - typically 30-45 minutes
- Executive Alignment Meetings
- Platform Success Audit
- Recurring customer webinar series - Office Hours, Workshops, Ask an Expert and more.



- Great opportunity to formally transition journey stages
- Sets clear and proper expectations for the partnership moving out of onboarding
- Ensures that all team members, Execs included have visibility into how we will continue to work together

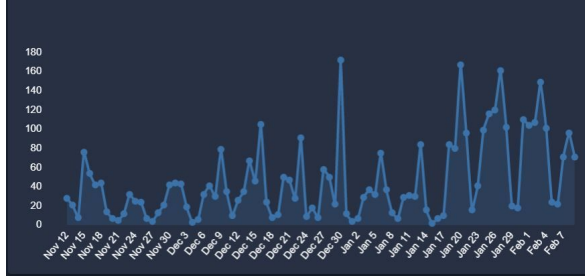


Outcome: Executive Alignment; supports a change in engagement cadence; reinforces goal alignment and progress

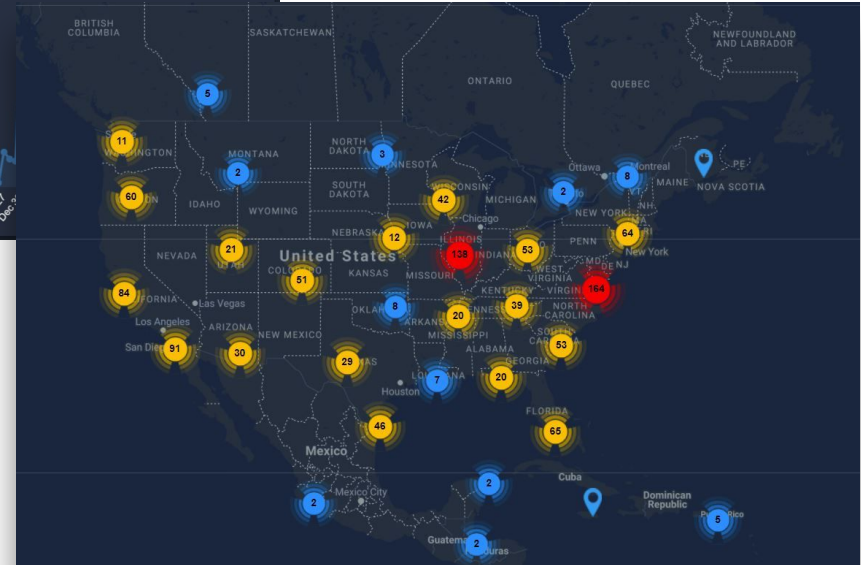
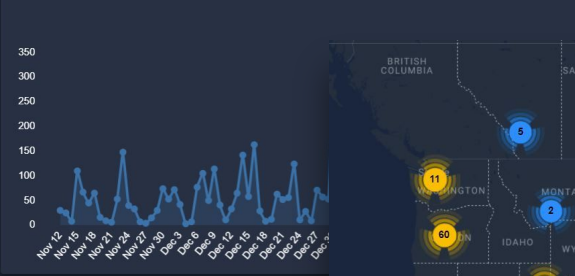
INSIGHTS AND ANALYTICS



Unique Deck Views 11/12/2021 - 02/09/2022



Total Deck Views 11/12/2021 - 02/09/2022



WHY DOCUMENT COMMUNICATION?

1.

**AVOID
SCHEDULING
UNNECESSARY
MEETINGS**

2.

**ACCELERATE
THE PROCESS**

3.

**DRIVE
ALIGNMENT**

4.

**ENHANCED
AND REGULAR
EXECUTIVE
ENGAGEMENT**

5.

**GAIN ACCESS
TO INSIGHTS
AND DATA**

WOULD YOU
LIKE A DEMO

<https://airdeck.co/client-success/>