

CUSTOMER SUCCESS WEBINAR SERIES

Account Reviews: Simple but Strategic Ways to Successfully Navigate Customer Partnerships

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ClientSuccess

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WHAT'S THE VALUE OF ACCOUNT REVIEWS?

- Facilitates an ongoing, structured conversation between a CSM & her/his leader about the CSMs BoB
- Allows you to take a step back from the day-to-day management of customers to think more strategically
- Drives alignment, accountability, and actionability
- Provides a second set of eyes to identify risk blindspots and strategic opportunities
- Surfaces important "contextual intelligence" that isn't always apparent in data, status updates, and reports
- Provides a powerful forum for coaching & mentoring



WHAT ARE ACCOUNT REVIEWS?

ARE NOT

- external between CSM & customers
- extremely time-consuming in prep and delivery
- one-way recital by CSM of mundane facts, statuses & updates
- complex account plans for a CSMs books of business
- reactive & historical
- only tactical review of accounts
- purely focused on "red accounts"

ARE

- internal between CSMs & her/his leader
- simple and streamlined format & focus
- collaborative & constructive conversations between a CSM & her/his leader
- simple reviews of a CSMs book of business
- proactive & actionable
- good mix of strategic & tactical
- focused on both at-risk & successful customers

HOW OFTEN SHOULD WE CONDUCT ACCOUNT REVIEWS?

Customer Success Leaders - Do you conduct Account Reviews with each of your CSMs? If so, how often?



461 votes

FREQUENCY & FORMAT

- Monthly or quarterly for 45-60 minutes (max)
- Limit the amount of preparation required by the CSM
- Use your CSP or a simple spreadsheet
- Make them casual, conversational & constructive
- Review every customer OR focus on targeted customer segments
- Identify ways you, the leadership team, and others across the company can help & empower the CSM
- Leave with documented Top 3-5 Actions list - for both the CSM and the leader (make it actionable!)
- Create a simple way to ensure proper follow-up & follow-through



The screenshot shows the clientSuccess dashboard with a table of client metrics. The table includes columns for Client, SuccessScore, ARR, Pulse, and Usage. Each row represents a different client, with their respective scores, revenue, and usage trends over time.

CLIENT	SUCCESSSCORE	ARR	PULSE	USAGE
<input type="checkbox"/> Blake Enterprises	18.3	\$49,461	61 DAYS	↑ 15%
Walmart	23.5	\$20,000	62 DAYS	↓ -3%
Disney	24.0	\$30,000	60 DAYS	↑ 5%
Jimmer Co.	50.0	\$200,000	69 DAYS	↑ 18%
Twitter	10.1	\$34,000	89 DAYS	↑ 0%
Diamond Gate Condos	36.4	\$12,500	89 DAYS	↑ 17%
eBay	16.7	\$26,000	89 DAYS	↓ -3%
PayPal	20.6	\$961,500	89 DAYS	↓ -13%
Lucky Brand	16.2	\$68,000	130 DAYS	↓ -14%
Stratasys	16.5	\$16,200	69 DAYS	↑ 16%
Unbounce	12.6	\$57,500	89 DAYS	↓ -18%
Hendrick Motorsports	11.6	\$30,800	89 DAYS	↓ -26%
Spotify	14.5	\$4,000	69 DAYS	↓ -15%
Ruffian Enterprises - Safety Division	20.8	\$23,000	69 DAYS	↓ -4%
Evernote	62.4	\$1,500,000	89 DAYS	↓ -10%
REI	14.1	\$50,000	69 DAYS	↓ -4%
Asana	10.0	\$20,000	69 DAYS	↓ -1%
Disneyland - Anaheim	24.3	\$50,000	60 DAYS	↑ 11%
DisneyWorld Orlando	14.8	\$570,000	69 DAYS	↓ -12%
Genomic England	18.2	\$62,000	89 DAYS	↑ 1%
LG	38.5	\$35,000	69 DAYS	↓ -8%
Square	19.2	\$28,000	89 DAYS	↓ -13%
Chevron	22.2	\$0	69 DAYS	↓ 0%

FREQUENCY & FORMAT

client success Clients Contacts Tasks Revenue NPS Reports My Company Search Help												
+ <input type="text" value="Filter by name"/> All my company's clients (166 selected)												
CLIENT	SUCCESSSCORE	ARR	TCV	CLIENT AS OF	RENEWAL (DAYS TO)	PULSE	PULSE SET	LAST TOUCH (DAYS AGO)	LAST ENGAGED (DAYS AGO)	ASSIGNED CSM	ASSIGNED	Segments
Blake Enterprises	18.3	\$49,461	\$58,500	May 1, 2016	Apr 24, 2022 (82)	61 DAYS	Dec 02, 2021	Feb 17, 2021 (349)	Feb 17, 2021 (349)	Dave Blake	TJ Ruff	✓ All my company's clients 166
Walmart	23.5	\$20,000	\$20,000	Dec 16, 2015	Jul 9, 2022 (158)	62 DAYS	Dec 01, 2021	Nov 16, 2021 (77)	Nov 16, 2021 (77)	Melissa Flygare	Jere	Renewing next 90 days 44
<input type="checkbox"/> Disney	24.0	\$30,000	\$40,000	Jan 17, 2018	Dec 22, 2022 (324)	60 DAYS	Dec 03, 2021	Jul 15, 2021 (201)	Jul 15, 2021 (201)	Melissa Flygare	Anas	At risk 123
Jimmer Co.	50.0	\$200,000	\$200,000	Nov 23, 2017	May 13, 2022 (101)	69 DAYS	Nov 24, 2021	Mar 4, 2020 (699)	Mar 4, 2020 (699)	TJ Ruff	Dave	All FREE Customers 6
Twitter	10.1	\$34,000	\$34,000	Dec 16, 2015	May 14, 2022 (102)	89 DAYS	Nov 04, 2021	Nov 3, 2021 (90)	Nov 3, 2021 (90)	Melissa Flygare	Kristi	At risk renewals, > 25,000 21
Diamond Gate Condos	36.4	\$12,500	\$25,000	Nov 12, 2014	Jan 3, 2023 (336)	89 DAYS	Nov 04, 2021	May 31, 2021 (246)	May 31, 2021 (246)	Melissa Flygare	Dave	At risk, low usage 0
eBay	16.7	\$26,000	\$26,000	Dec 16, 2015	Apr 12, 2022 (70)	89 DAYS	Nov 04, 2021	Jul 15, 2021 (201)	Jul 15, 2021 (201)	Melissa Flygare	JD N	Big Customers That Finished Onboarding 3
PayPal	20.6	\$961,500	\$961,500	Dec 16, 2015	Mar 24, 2022 (51)	89 DAYS	Nov 04, 2021	May 12, 2021 (265)	May 12, 2021 (265)	Melissa Flygare	Kristi	CEOs Daily View 135
Lucky Brand	16.2	\$68,000	\$68,000	Jan 8, 2015	Nov 24, 2022 (296)	130 DAYS	Sep 24, 2021	Jan 5, 2021 (392)	Jan 5, 2021 (392)	Melissa Flygare	Jere	Critical Accounts - Check Daily! 59
Stratasys	16.5	\$16,200	\$16,200	Aug 26, 2014	Jan 7, 2023 (340)	69 DAYS	Nov 24, 2021	Mar 16, 2021 (322)	Mar 16, 2021 (322)	Dustin Bailey	Jere	Customers in Onboarding 10
Unbounce	12.6	\$57,500	\$115,000	Jan 24, 2018	Jul 14, 2023 (528)	89 DAYS	Nov 04, 2021	Jul 5, 2021 (211)	Jul 5, 2021 (211)	Melissa Flygare	JD N	Customers using Discover product 23
Hendrick Motorsports	11.6	\$30,800	\$30,800	Jul 12, 2014	Jan 9, 2023 (342)	89 DAYS	Nov 04, 2021	Oct 28, 2021 (96)	Oct 28, 2021 (96)	Melissa Flygare	TJ R	For Automation: Exclude Severe Risk Customers 156
Spotify	14.5	\$4,000	\$4,000	Feb 1, 2018	Jan 7, 2023 (340)	69 DAYS	Nov 24, 2021	Mar 18, 2020 (685)	Mar 18, 2020 (685)	Dave Blake	Kristi	Last engaged > 30 Days 106
Ruffian Enterprises - Safety Division	20.8	\$23,000	\$46,000	Jul 18, 2018	May 27, 2023 (480)	69 DAYS	Nov 24, 2021	Dec 19, 2019 (775)	Dec 19, 2019 (775)	Harrison Noble	TJ R	Melissa's Customers 53
Evernote	62.4	\$1,500,000	\$1,500,000	Jul 3, 2019	Feb 15, 2022 (14)	89 DAYS	Nov 04, 2021	Nov 4, 2021 (89)	Nov 4, 2021 (89)	Melissa Flygare	Kristi	MRR > \$10k / High Risk 4
REI	14.1	\$50,000	\$50,000	Sep 8, 2014	Dec 26, 2022 (328)	69 DAYS	Nov 24, 2021	Dec 23, 2020 (405)	Dec 23, 2020 (405)	Dustin Bailey	TJ R	New Clients (30 days) 0
Asana	10.0	\$20,000	\$20,000	Sep 28, 2014	Jan 4, 2023 (337)	69 DAYS	Nov 24, 2021	Oct 14, 2020 (475)	Oct 14, 2020 (475)	Dustin Bailey	Jere	Platinum 54
Disneyland - Anaheim	24.3	\$50,000	\$100,000	Dec 22, 2017	Oct 1, 2023 (607)	60 DAYS	Dec 03, 2021	Jul 13, 2021 (203)	Jul 13, 2021 (203)	Melissa Flygare	TJ R	Renewal 120 Days 58
DisneyWorld Orlando	14.8	\$570,000	\$570,000	Oct 22, 2019	Apr 2, 2022 (60)	69 DAYS	Nov 24, 2021	Jul 22, 2020 (559)	Jul 22, 2020 (559)	Dave Blake	Jere	Renewal in 120 58
Genomic England	18.2	\$62,000	\$77,000	Nov 30, 2017	Jun 30, 2022 (149)	89 DAYS	Nov 04, 2021	Jul 1, 2021 (215)	Jul 1, 2021 (215)	Melissa Flygare	JD N	Renewals < 90 days, at risk 25
LG	38.5	\$35,000	\$35,000	Aug 30, 2019	Nov 15, 2022 (287)	69 DAYS	Nov 24, 2021	Jul 29, 2021 (187)	Jul 29, 2021 (187)	Harrison Noble	Dave	Required - Weekly Pulse Checks 164
Square	19.2	\$28,000	\$28,000	Apr 11, 2018	Jan 7, 2023 (340)	89 DAYS	Nov 04, 2021	Nov 17, 2021 (76)	Nov 17, 2021 (76)	Melissa Flygare	Kristi Faltorusso	SMB Segment 3
Chevron	22.2	\$0	\$0	Oct 24, 2014	May 17, 2022 (105)	69 DAYS	Nov 24, 2021	Feb 10, 2021 (356)	Feb 10, 2021 (356)	Dustin Bailey	Anastasia Zybinska	SuccessScore <50 135
												Trial Customers 4
												Platinum
												Reseller

ACCOUNT REVIEW SEGMENTS

NEW CUSTOMERS WITHIN FIRST 90 DAYS

- Are they progressing down the onboarding path at the right pace or are they delayed or completely stalled?
- Do we have the right resources engaged, on both sides?
- What early risks have surfaced that need extra attention?
- What notable successes have we experienced?
- What learnings can we apply to improve the overall onboarding experience?
- Are we delivering to the expected time-to-value?
- Have we achieved any defined goals & objectives?



TRIALS, POCs & OPT-OUTS

- Are the trials, POCs or opt-outs progressing as plan?
- Are there early risks that we need to mitigate?
- Have we identified any threats that may prevent the relationship from converting to a formal partnership?
- Which customers are not proceeding, and why?
- Which customers have converted?



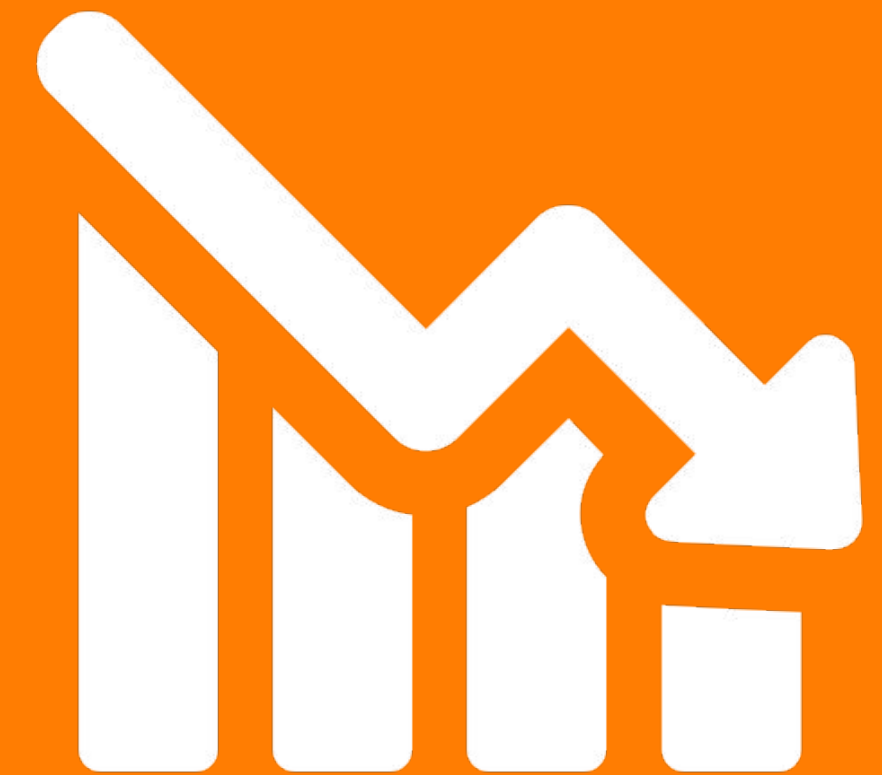
LAST ENGAGEMENT > 30/45/60 DAYS AGO

- Who we talked to in the last 30 days?
- Why haven't we engaged with them recently?
- Do any of these customers prefer not to engage as frequently?
- Are there any unresponsive customers? If so, how can we engage them in an impactful way?
- Who would be the best person to reach out to the customer (CSM, leader, Exec Sponsor, CEO)?
- What's the next step, goal or milestone that needs to be completed for these customers?



LOW USAGE & ADOPTION

- Which customers have low usage & adoption of our product(s)?
- Why aren't they engaging with our product? What are the barriers to adoption and how can we remove them?
- Are there cyclical usage patterns that are at play?
- Have the users been properly trained? Do we need to provide refresher training?
- What features can provide the most value to each customer?
- How can our product team help drive usage & adoption through enhancements, new features, documentation, etc?



HIGH USAGE & ADOPTION

- Which customers are using our product(s) the most, and why?
- Which features are delivering the best value to these customers?
- What learnings can we apply to low usage customers?
- Would these customers be references or give us reviews?
- How can we expand their usage even more?



GOALS/DESIRED OUTCOMES ACHIEVED

- Which customers have we been able to achieve goals, success criteria, or desired outcomes?
- What are the top 3-5 wins across your BoB?
- Which customers don't have documented goals?
- Which goals are behind pace or stalled?
- How we can align the right resources to help your customers achieve their goal(s)?



RED ACCOUNTS

- Which customers recently changed to RED status?
- What are the core issues causing them to be RED?
- What are the next steps to return to GREEN status?
- Who needs to be engaged to help?
- Who has recently improved to YELLOW or GREEN status?
- Which customers have been RED longer than 30/60/90 days?
- Which executives need to be engaged and/or reaching out to the RED customers?



HEALTH SCORE < 40

- Which customers have a health score that has dropped below 40? (scale of 0-100)
- What are the factors for the health score dropping?
- How can we engage quickly to reverse the dropping trend?
- Who do we need to engage to help reverse the trend?
- Does the customer understand why their health is falling?



HEALTH SCORE > 80

- Which customers have recently improved their health score to above 80%?
- What factors are impacting the strong health score?
- How can we replicate the success factors across other customers in the book of business?
- Which customers have recently dropped out of the positive range, and why?
- Which of these customers may be willing to be advocates for us?



STRATEGIC OR TOP 10 CUSTOMERS

- How are your most strategic customers doing?
- What risks have surfaced that need to be mitigated?
- What successes have happened as of late?
- When was the last time they received an outreach from our of our Executives or our assigned Executive Sponsor?
- Which strategic customers are in RED?
- What expansion opportunities have we identified?
- What are the top feature requests from your top customers?



NPS FEEDBACK

- Who are our recent detractors?
- Who are our recent promoters?
- What is the specific feedback shared?
- Who should follow-up and close the loop on the feedback?
- Which of customer executive sponsors and key contacts responded, and what were their responses?
- Whose feedback is trending down (or up)?
- What action items do we need to take to change detractors to promoters?
- Would the promoters be willing to be advocates?



EXPANSION OPPORTUNITIES

- What expansion opportunities have you identified across your BoB?
- How are you collaborating with sales to close the opportunities?
- What are the next steps to process the opportunities down the pipeline to close?
- Who do we need to engage from our organization to help close the deals?
- Which expansion opportunities are at risk?
- Which deals have we lost, and why?
- How are you progressing towards your overall expansion targets/goals?



RENEWALS WITHIN 120 DAYS

- Which customers are renewing in the next 120 days?
- Which renewals are at risk for churn, and what is our action plan to get them to renew?
- Which customers are on the fence, and why? What will influence them to commit to renew?
- Which customers are forecasted to renew?
- Which customers are willing to renew early?
- Who do we need to engage across the company to help win/secure/solidify the renewal?



CHURNED CUSTOMERS

- Which customers churned and why did they churn?
- What did we do to try to save the customer?
- Did you feel properly supported in trying to prevent the customers from churning?
- Did we conduct an exit/offboarding interview with the churn customers? If so, what were the learnings?
- What were the top 3 reasons for churn across your book of business?
- What specific action items/learnings do we need to act on as a company to avoid future churn?



RENEWED CUSTOMERS

- Which customers have renewed?
- Which were your top 3 renewal wins, and why?
- Do you have expansion revenue attached to any renewals?
- Can we spot any common success factors from the customers who renewed?
- Have you reset/recaptured the new goals/success criteria/desired outcomes for this next phase of the partnership?



THANK YOU