



CHRISTINE TROST



VP SALES AND CUSTOMER SUCCESS

FranklinCovey

Leading Through Disruption Proving Value and Growing CS



CS100SUMMIT



PHOEBE MCKINNEY



SENIOR DIRECTOR, CUSTOMER SUCCESS

FranklinCovey

Leading Through Disruption
Proving Value and Growing CS



CS100SUMMIT

Our Mission

We enable greatness in people and organizations everywhere

40

Years

\$200M+

Invested in research & solutions

160+

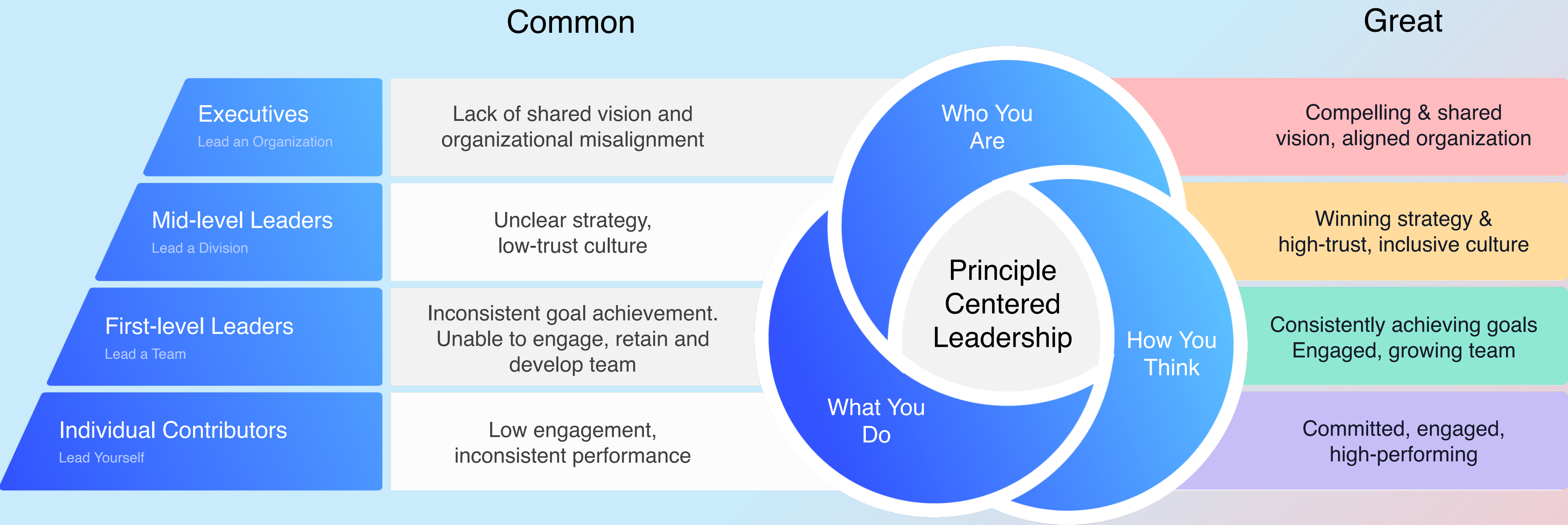
Countries served

30M

Leaders Developed



Great leaders operating in a high-performing culture build great organizations



We generate impact at scale by uniquely combining content, people, and technology

Content

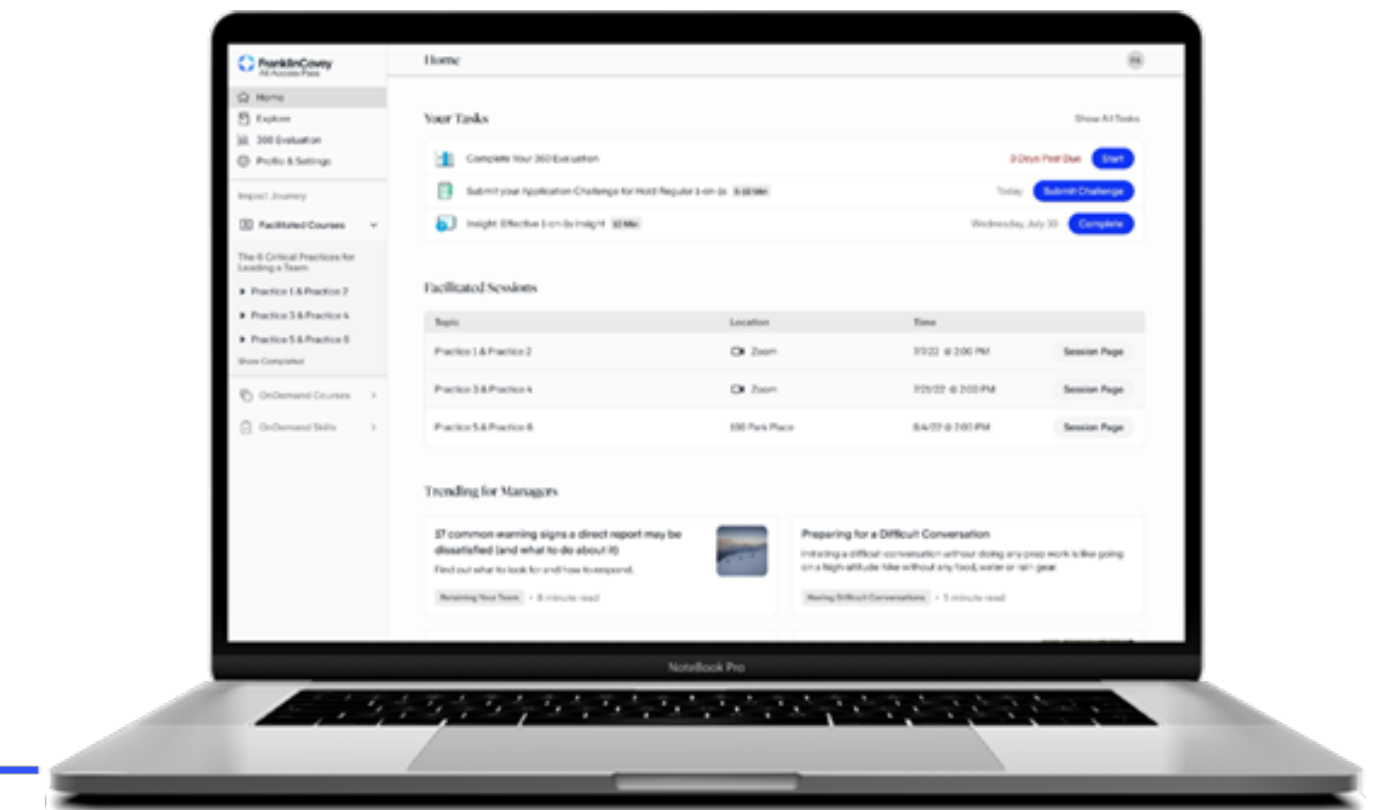
Leadership
Individual Effectiveness
Winning Culture
Business Results

People

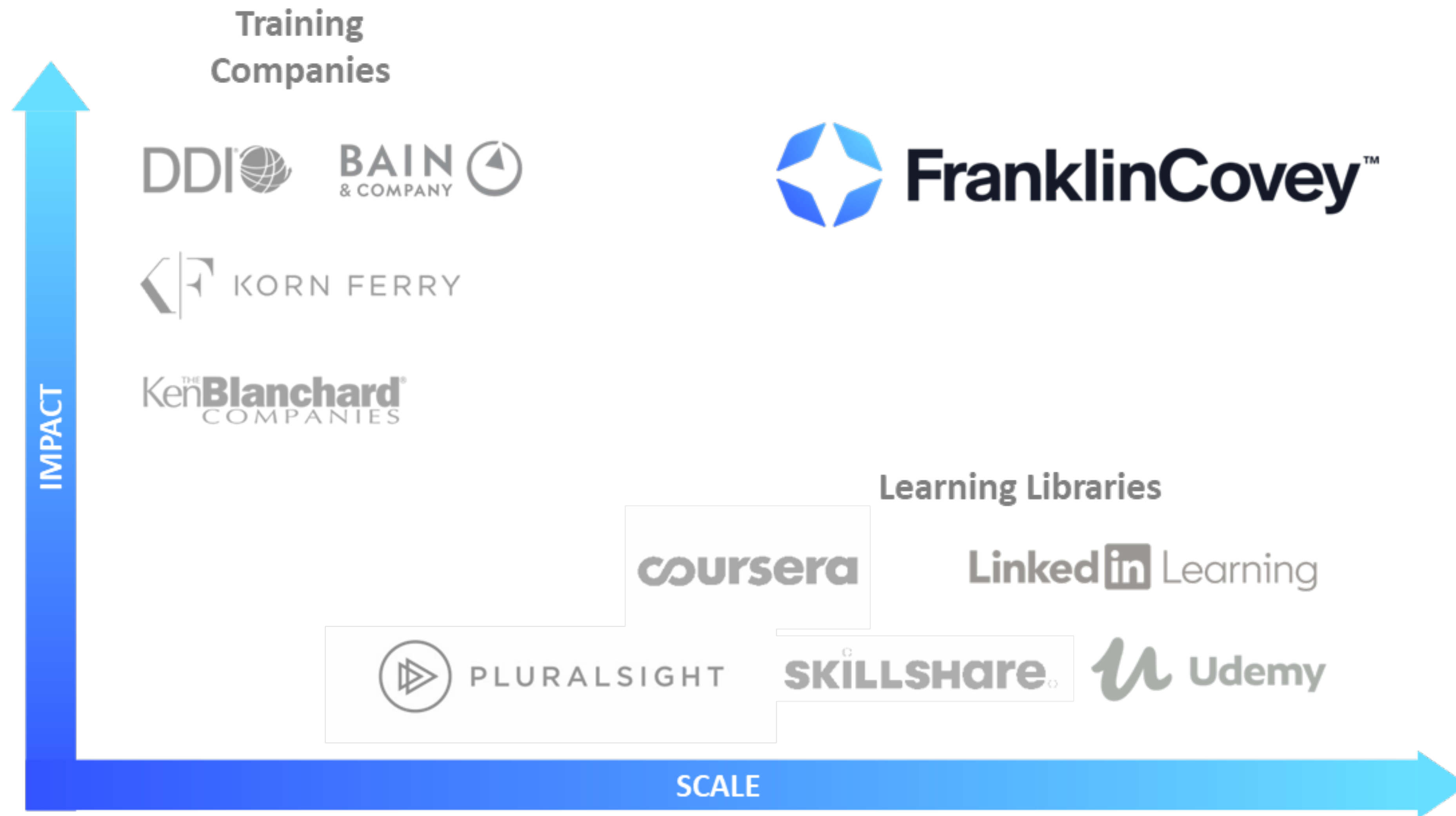
Delivery Consultants
Coaches
Client Facilitators

Technology

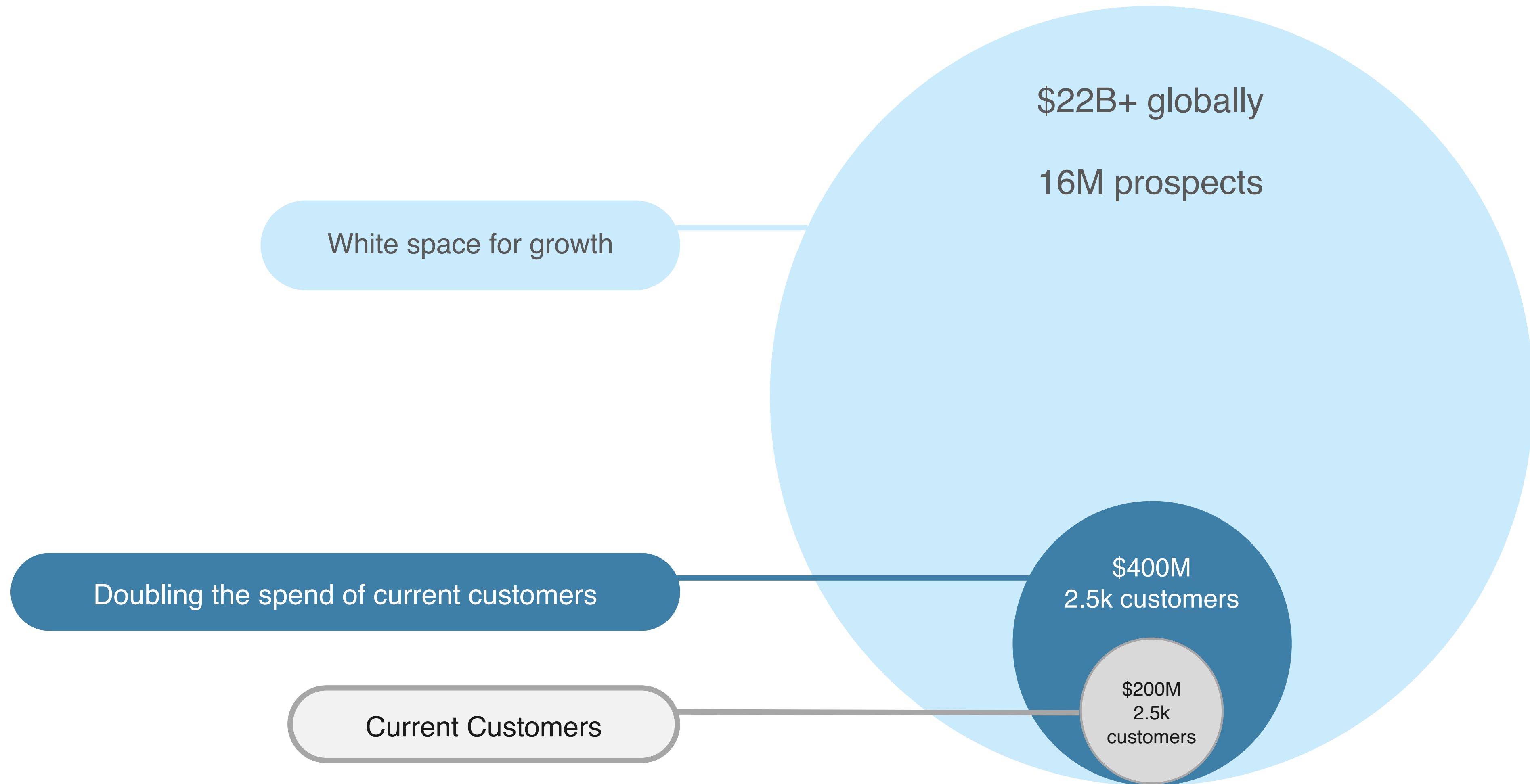
360 Assessments
OnDemand Impact Journeys
FC & Client-facilitated
Impact Journeys



Our approach is unique



The Growth Opportunity is Massive



Change: Optimize for growth

Every role focused on the right activities at the right times



Building the Business Case

For increasing CSM headcount at a time of suboptimal growth



Building the business case



1. Executive Summary

Problem Statement

Proposal

Expected Outcomes



2. Data analytics & Opportunity Cost

Sellers time spent on non-selling activities

Impact of non-selling activities

Impact of missed opportunities



3. Propose Solution

Increase CSM Headcount

CSM Cost vs. Revenue Impact

ROI

RACI: Matrix Overview



R	RESPONSIBLE	This entity is responsible for action or implementation . Responsibility can be shared. Responsible parties are also in charge of engaging “Consulted” and “Informed” entities.
A	ACCOUNTABLE	The entity that has the ultimate ownership and decision making for process step – the entity that carries the risk associated with completion of the task or project. Accountability cannot be shared. Does not imply responsibility for conducting an activity.
A / R	ACCOUNTABLE & RESPONSIBLE	The entity that has the ultimate ownership and decision making for process step and the entity is responsible for action or implementation .
C	CONSULTED	An entity that should (but not always) be consulted before each decision/action is taken. This incorporates two-way communication. If an entity is consulted regarding a subject, this will automatically imply that they will be informed of the outcome.
I	INFORMED	An entity that may be informed after each decision/action is taken. This incorporates one-way communication.

FROM: Rules of Engagement



	Buyer Value Journey						
	Identify			Land		Adopt	Expand
	Prospect	Qualify Lead	Strat. Plan	Client Dev. & Scoping	Negotiate & Close	Onboarding & Implementation	Manage Relationship & Upsell
Sales Rep	A / R	A / R	A / R	A / R	A / R	A	A / R
SDR	R	R	I	I	I		
CSM						R	R
Solutions Architect				C	C	C	C
Contract Coordinator	R			C			

R

Responsible for doing work

C

Consulted before and after task

of progress/completion

#CST00301M1111

TO: Rules of Engagement



	Buyer Value Journey						
	Identify			Land		Adopt	
	Prospect	Qualify Lead	Strat. Plan	Client Dev. & Scoping	Negotiate & Close	Onboarding & Implementation	Manage Relationships Upsell
Account Executive	A	A / R	A / R	A / R	A / R	C	C
Account Manager			C	C		A	A / R
SDR	R	R	I	I	I		
CSM						R	R
Solutions Architect	R	Responsible for doing work			C	Consulted before and after task of progress/completion	

Job Profile: Account Manager

The Role

- **Reports to:** Managing Director
- **Direct Reports:** N/A
- **Account Load:** TBD - Sizing

Key Outcomes

- Significant growth within segment
- 100%+ retention of current programs
- Trusted partner with client contacts and stakeholders
- Expert on customer challenges and growth opportunities

Mindset & Behaviors

- Strong growth orientation - looks for opportunities to tell a compelling value story and expand FranklinCovey's footprint
- Able to address customers specific needs and goals

Segment Focus



Buyer Value Journey



Key Responsibilities

- **Manage Relationship & Upsell** – Manage and grow relationships to drive expansion and renewals across assigned accounts. Develop business partner relationship with existing clients; interact with multiple buyer groups across the company.
- **Cross-Sell** – Expand and sell new FranklinCovey products and solutions to new users or buyer groups.
- **Renew** – Minimize churn by selling multi-year deals and working with cross functional teams to drive adoption within your accounts.

Core Competencies

- Customer-Centric Approach
- Strategic Thinking
- Customer Relationship Development
- Results Driven
- Proactive Engagement
- Internal quarterback of the account team

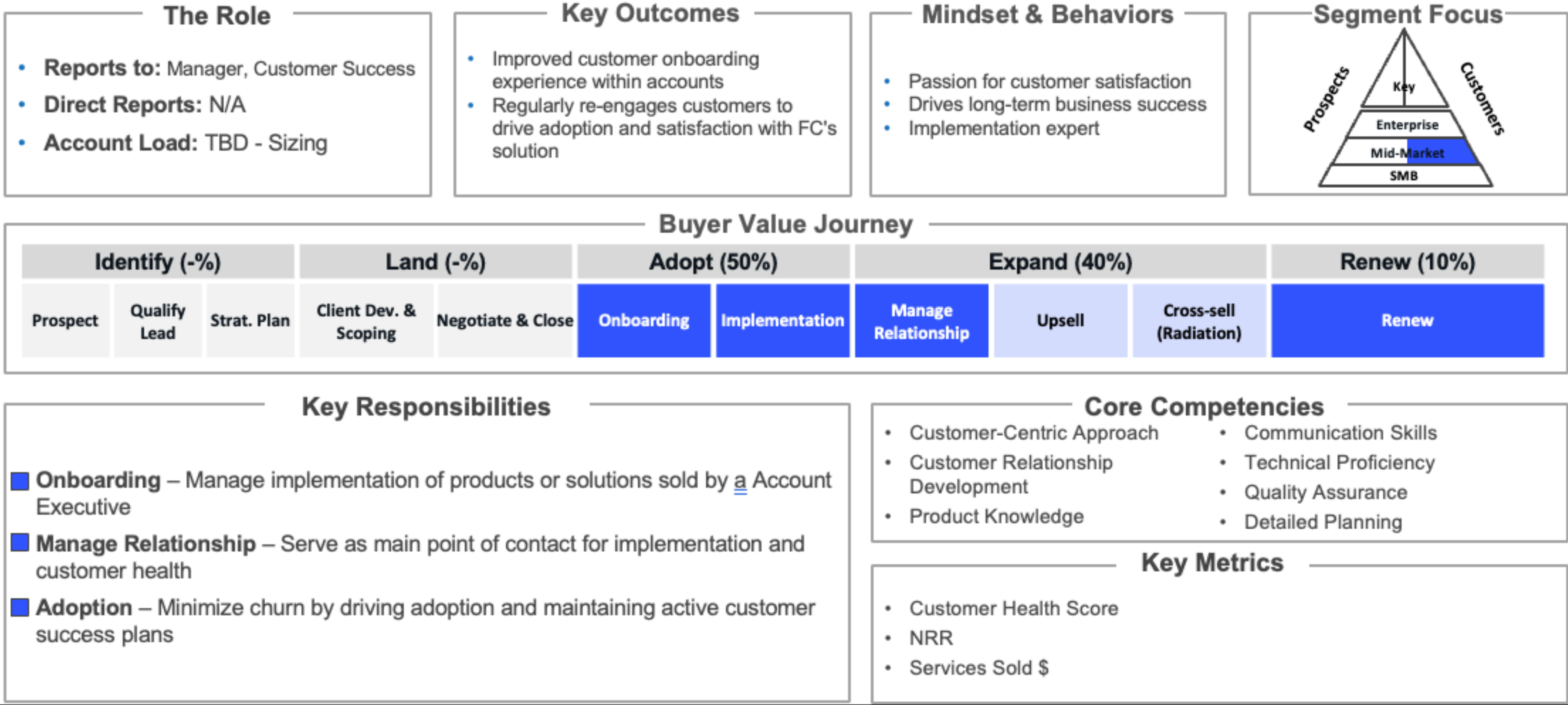
Key Metrics

- Account Retention
- Account Growth
- Cross Sell – product mix
- Revenue Attainment

■ Primary ■ Secondary / As Needed



Job Profile: CSM



■ Primary ■ Secondary / As Needed



Capacity/ Headcount Modeling

Customer Engagement Model

- Onboarding
- QBRs
- Implementation Check Ins
- Customer Support/ Resolution
- Proactive Engagement

Time Allocation

- Preparation
- Customer Facing Meetings
- Internal Time
- Strategic Activities

CSM to Customer Ratio

Capacity per CSM

Headcount Modeling

- Number of Customers
- Capacity per CSM



Massive Change to Achieve Massive Growth

From 33 to
46 CSMs

From 3 to 6
CS
Managers

\$2.4m
invested in
CSM
growth

\$200K in
CS tech

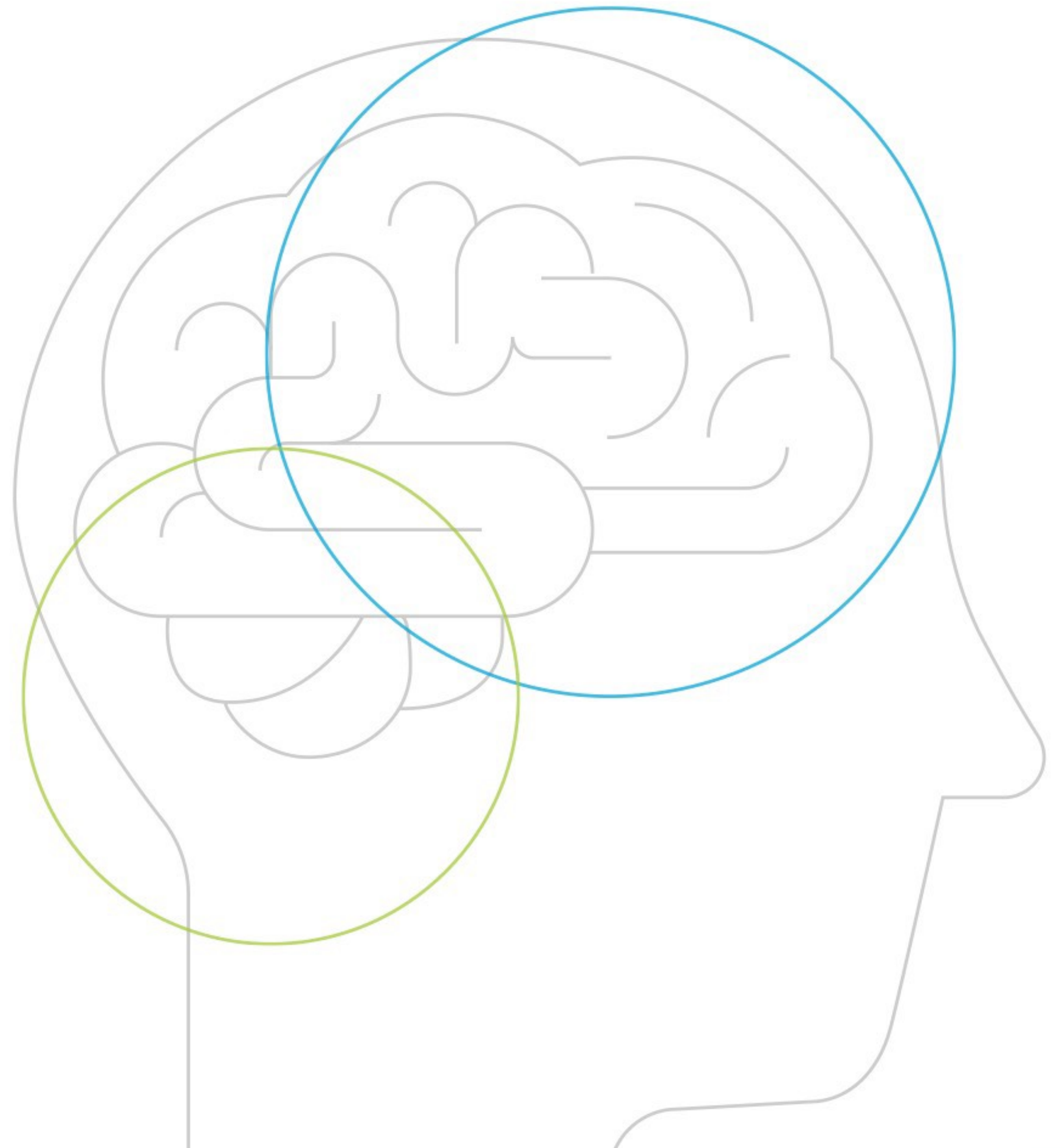


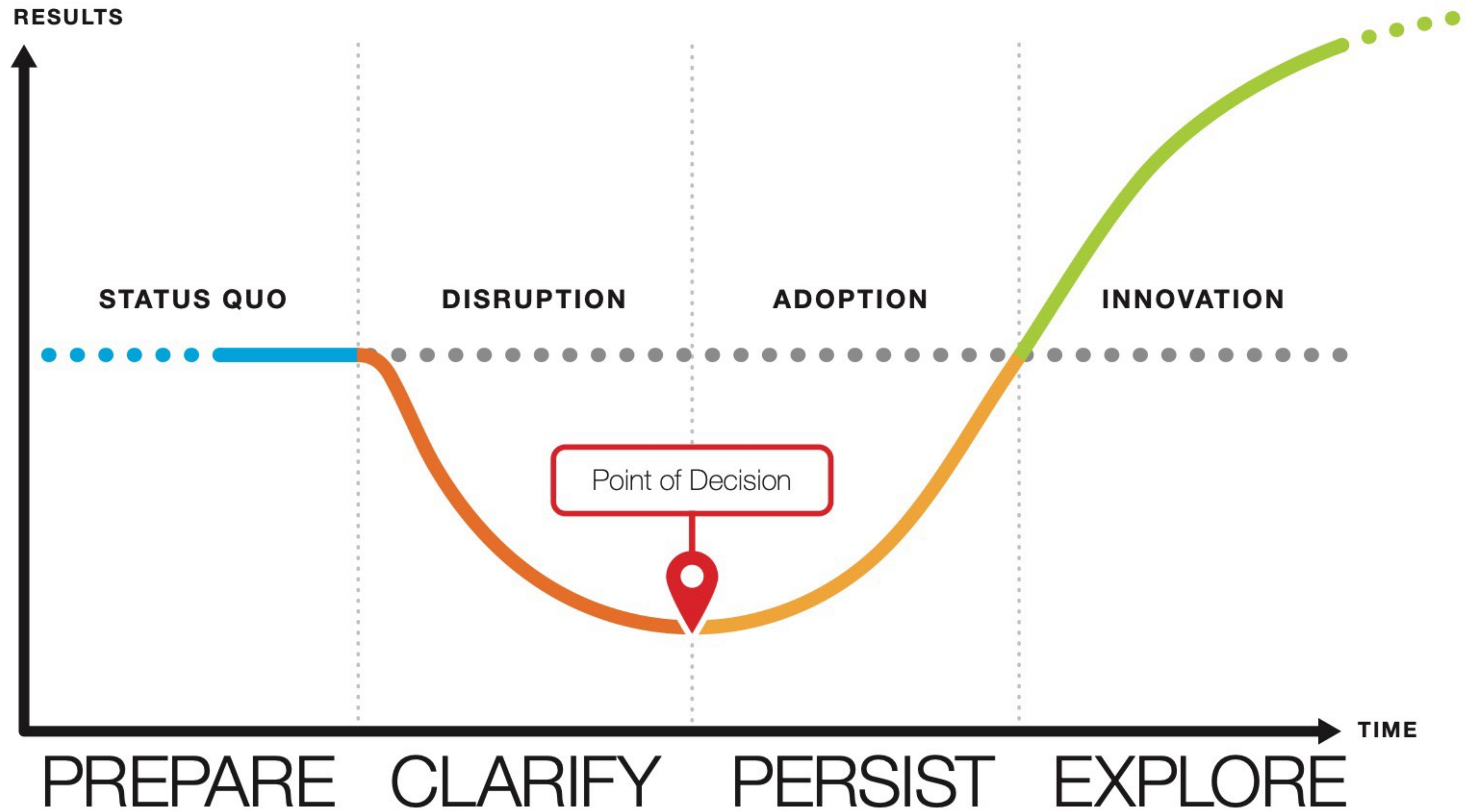
Every organization has strategic moments of disruption.

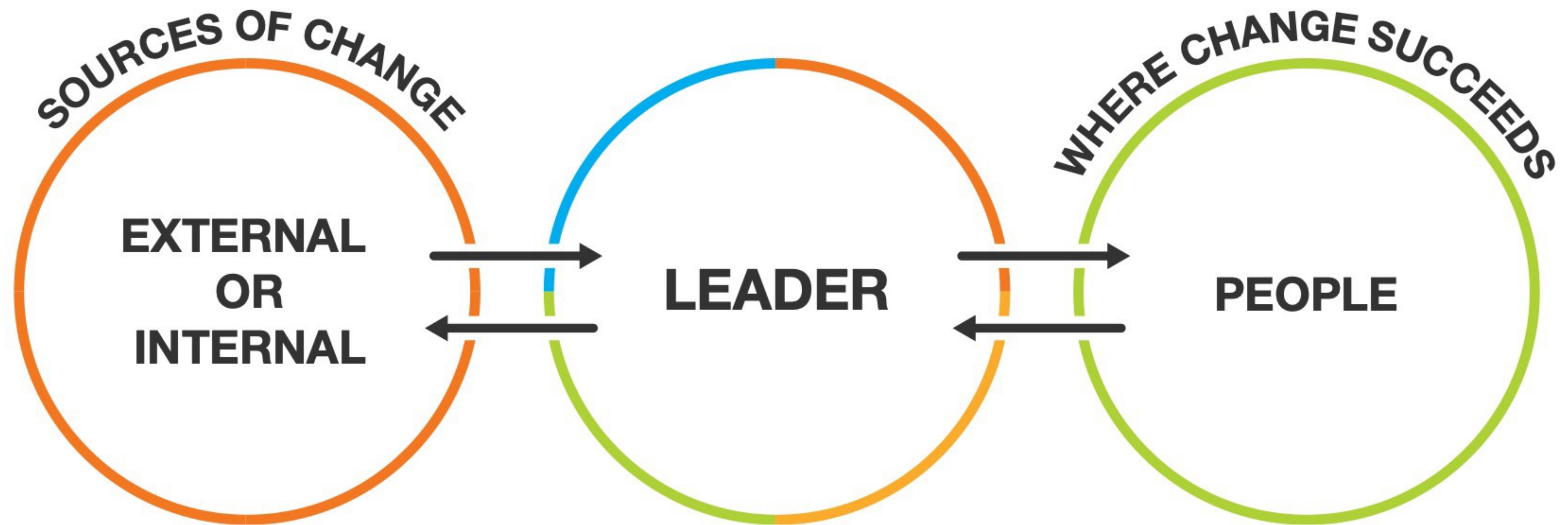
What is the change you are leading through today or in the near future?



**As humans, we're
wired to react to
change to survive.
We're also amazingly
adaptable.**







Envision

↳ to help your team **PREPARE.**

Dialogue

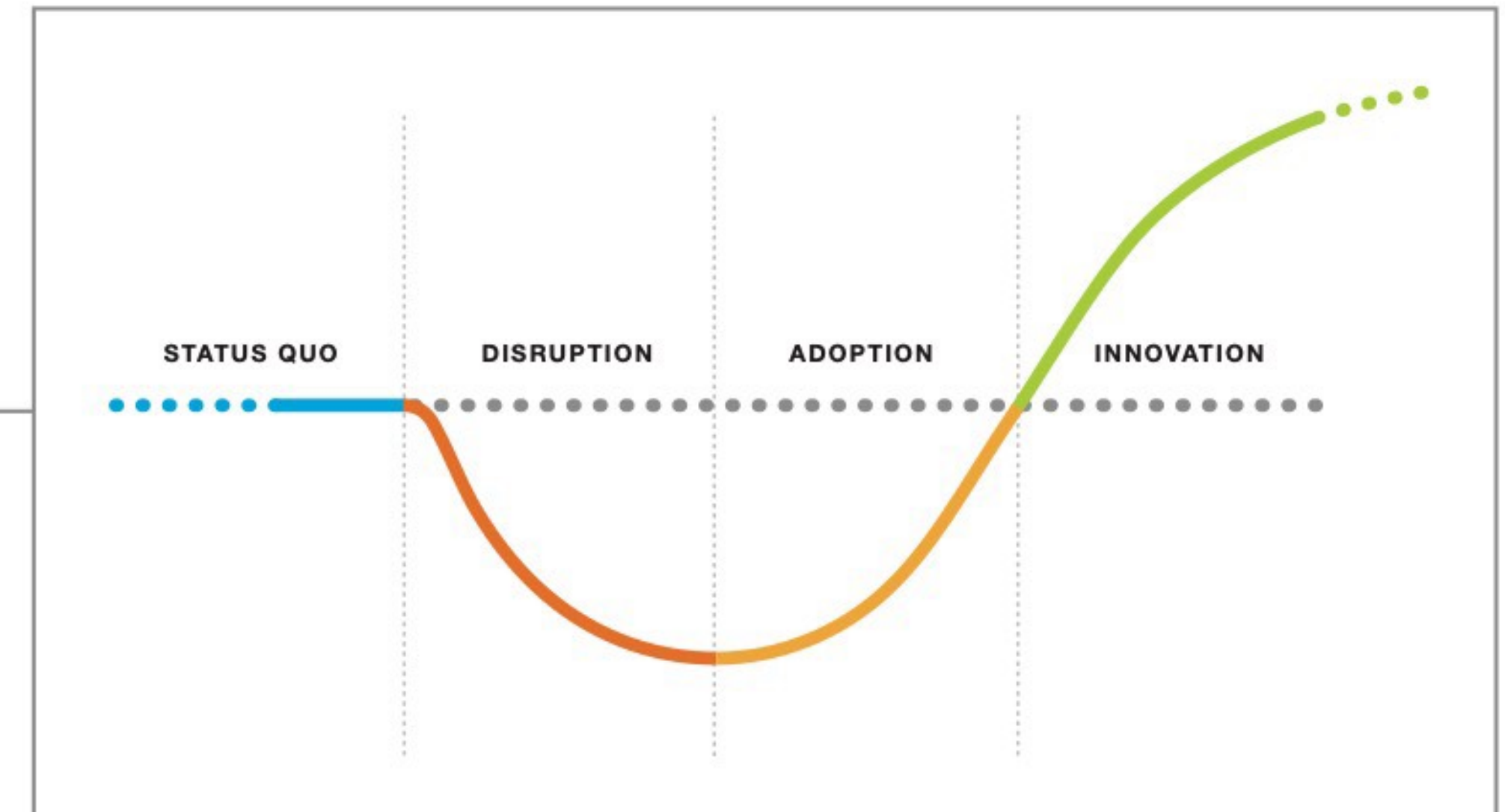
↳ to help your team **CLARIFY.**

Engage

↳ to help your team **PERSIST.**

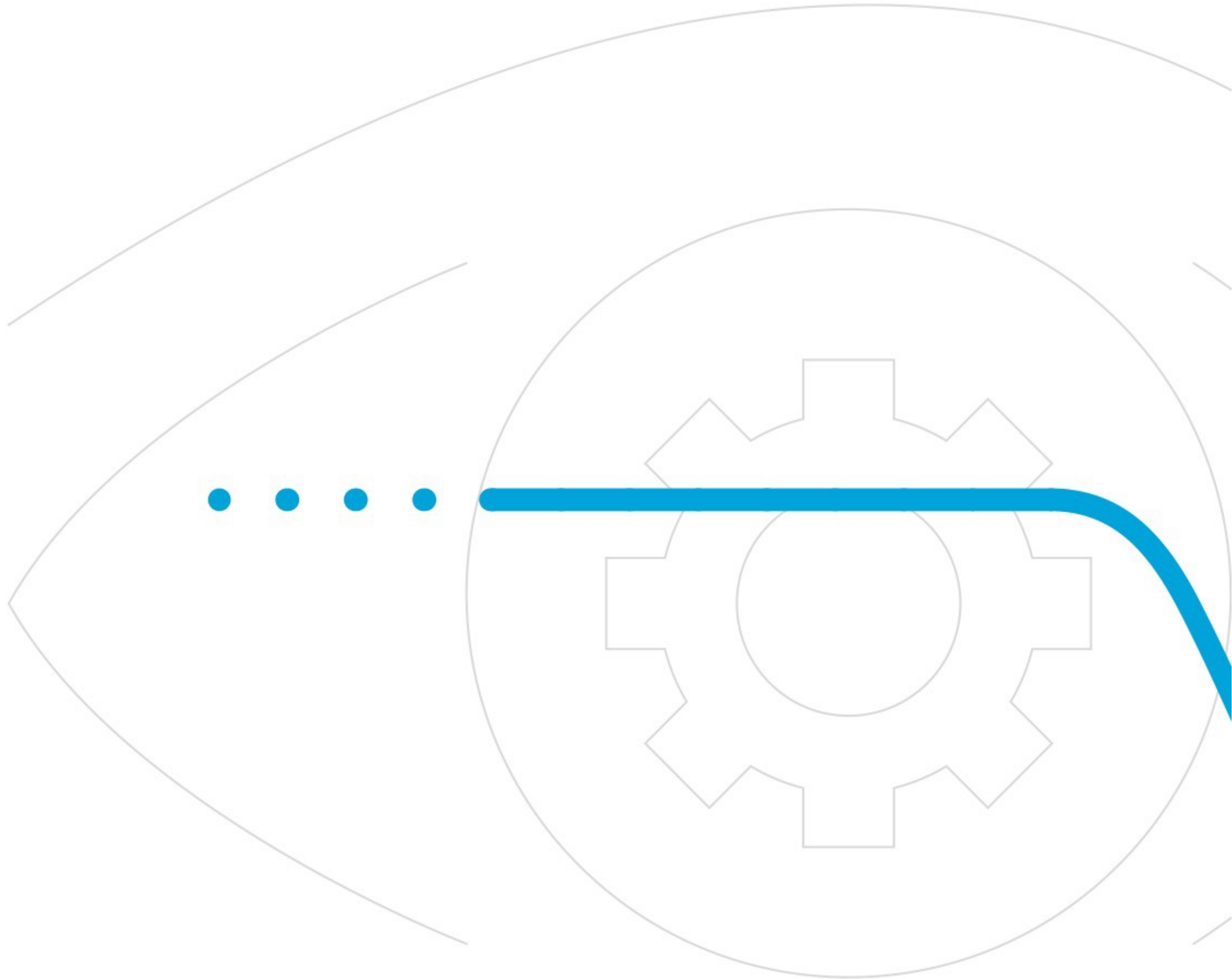
Inspire

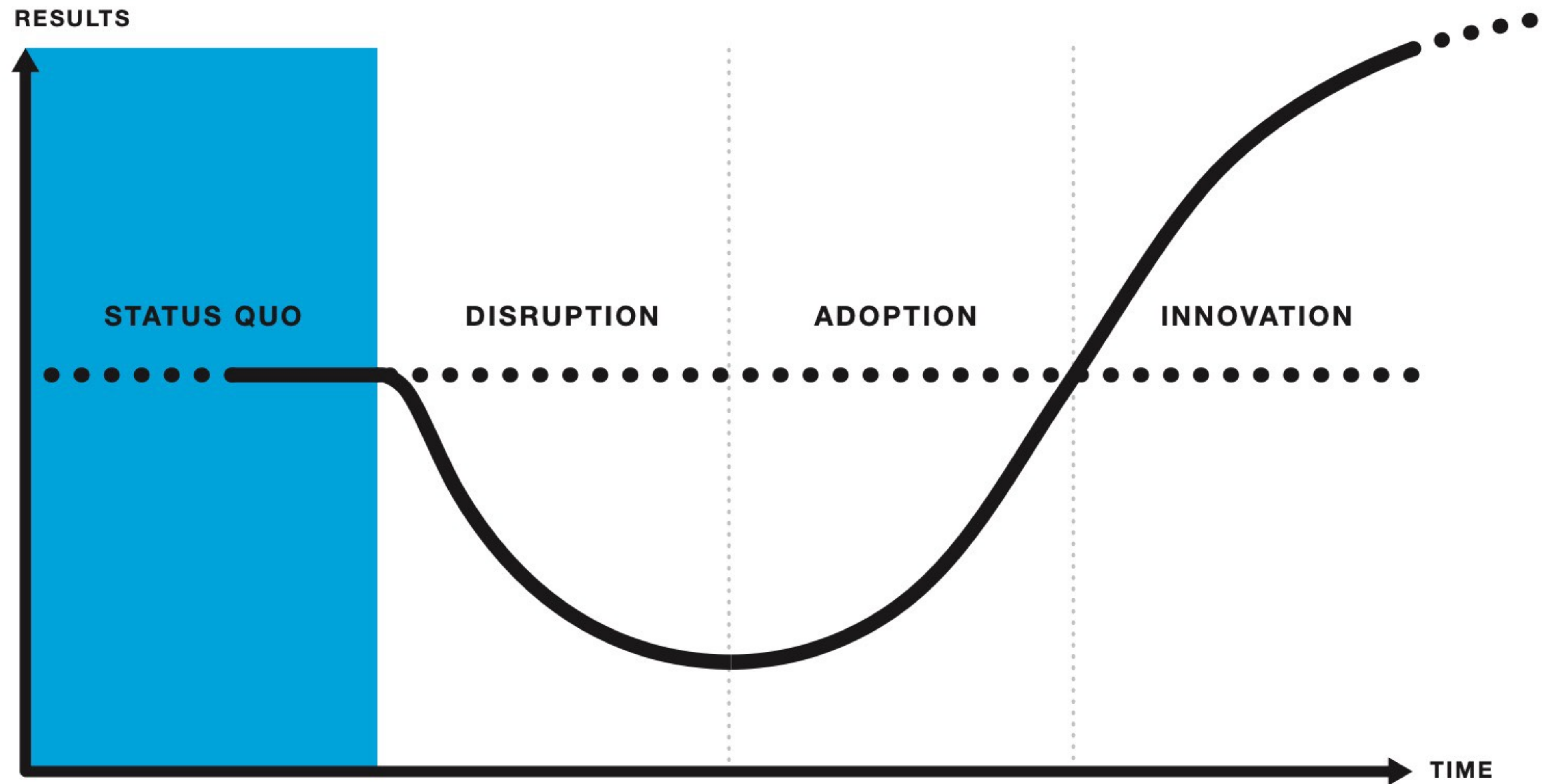
↳ to help your team **EXPLORE.**



REMEMBER

**Envision,
Don't Just
Convey**





CHANGE TALK

PREPARE FOR CHANGE

CHANGE TALK—FOR LEADERS

PREPARE FOR CHANGE

Use this Change Talk to have open-ended conversations that help team members prepare for change while in the Zone of Status Quo.

Your team members learned to:

SCAN trends, patterns, or plans.

ASK for others' perspectives.

ACT to get better organized.

When team members ASK for your perspective, use the questions on the other side of this card to help them SCAN or ACT.

PREPARE FOR CHANGE

When team members ASK for your perspective, use these questions.

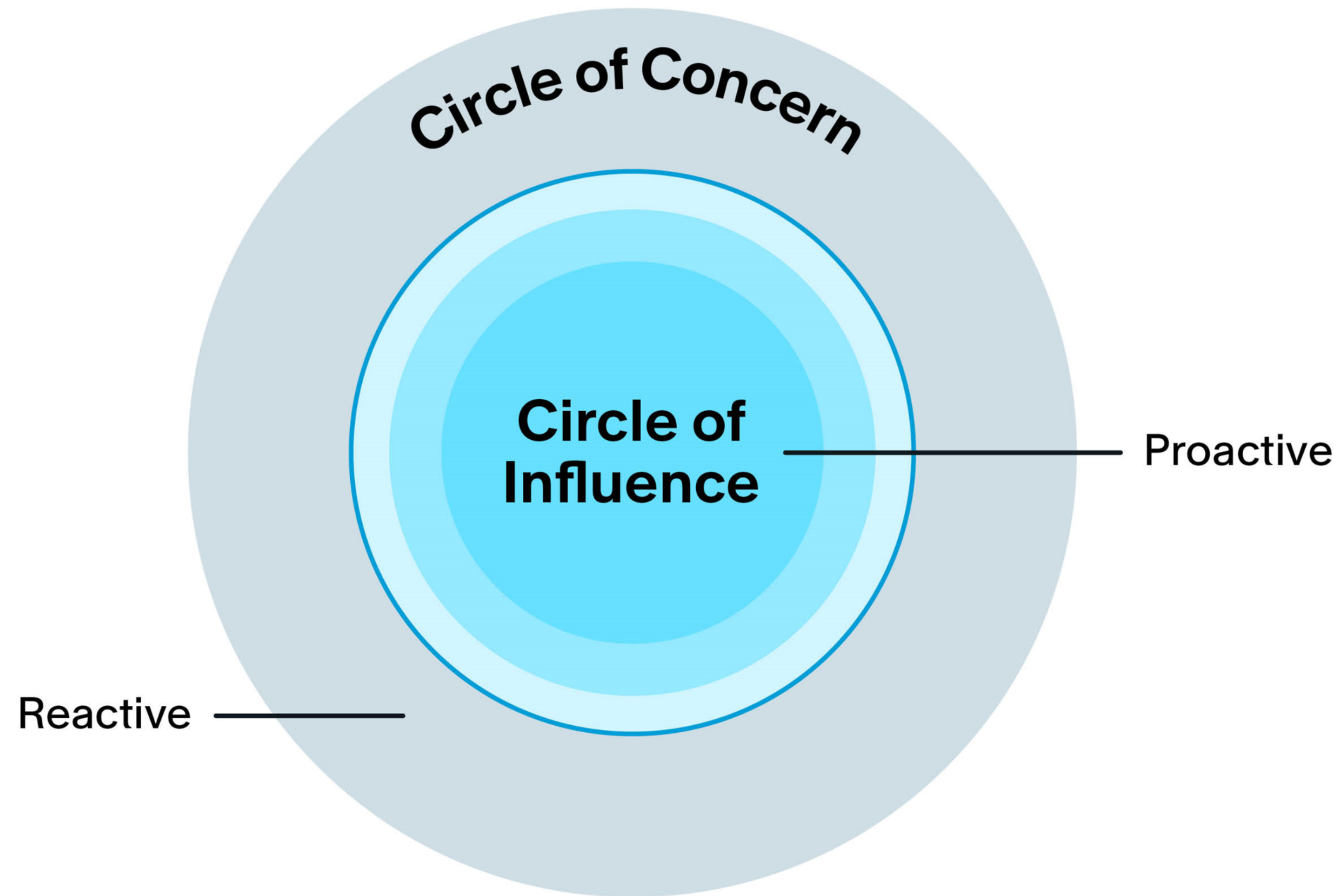
SCAN

- How do we contribute to our organization's strategic plan?
- What industry trends or patterns might affect us?
- What is happening that we should not ignore?

ACT

- How ready do you feel for change?
- What can we do today to prepare for tomorrow?
- What have we put off that we need to prioritize?

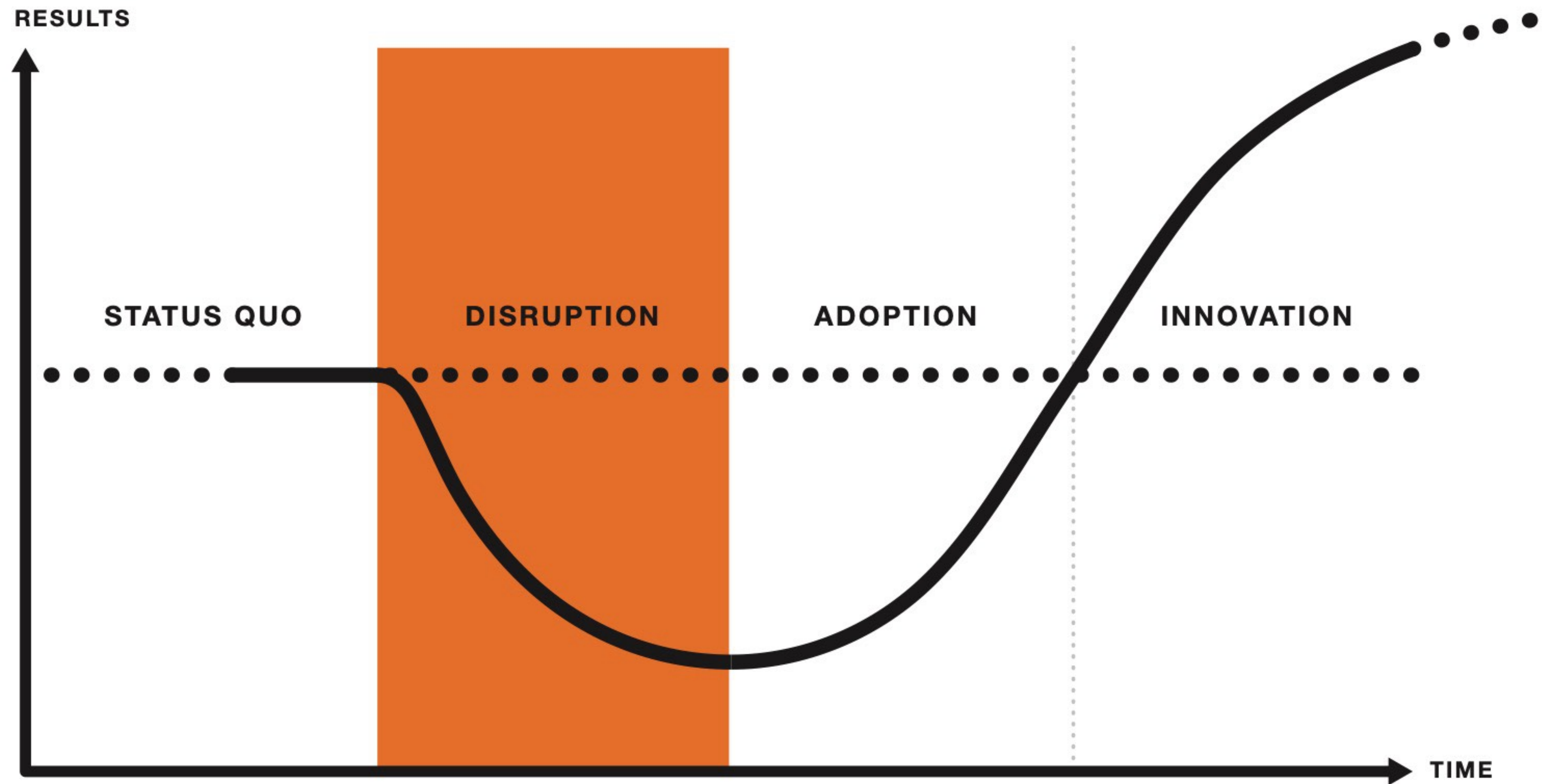




REMEMBER

**Dialogue,
Don't Dictate**





CHANGE TALK MANAGE REACTIONS

CHANGE TALK—FOR LEADERS

MANAGE REACTIONS

Use this Change Talk to dialogue with your team about their reactions to a change so they can clarify and make progress on the change.

Declare your intent to understand their perspective. Then:

ASK AND LISTEN to learn their thoughts about the change.

SUPPORT them by identifying specific ways you can help.

PLAN how to move forward together.

Use the questions on the other side of this card.

MANAGE REACTIONS

ASK AND LISTEN

- What concerns you most about the change?
- What clarity do you need?
- What would success look like for you?

SUPPORT

- What will help you feel more confident about the change?
- How can the team or I support you in moving forward?

PLAN

- What can we do to make progress?
- When will we check in again?



Envision

↳ to help your team **PREPARE.**

Dialogue

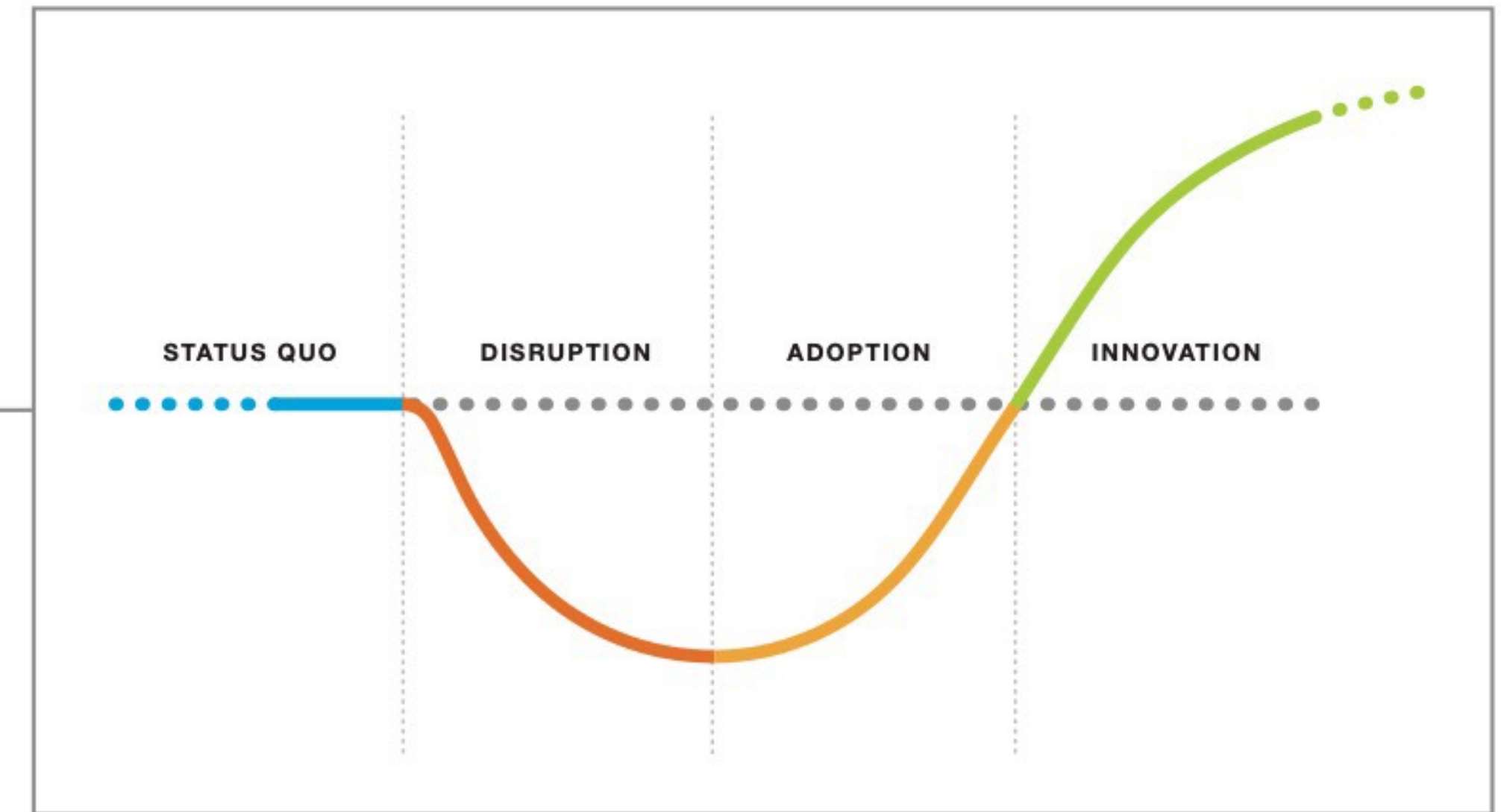
↳ to help your team **CLARIFY.**

Engage

↳ to help your team **PERSIST.**

Inspire

↳ to help your team **EXPLORE.**



CHANGE LEADERSHIP MINDSET
**I am the key to change
success—no matter where
change starts.**

