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# **Monetizing Post-Sales: Working Hard for the Money**



CS100SUMMIT

# Monetizing Post-Sales



- Problem: CS is not driving value
- Solution: Monetizing your post-sales offers
- Pre-Reqs: Self-assessment & finding friends
- Investigative Journalism: 5Ws & an H
- GTM: Welcome to the matrix to Target Well
- Show me the MONEY
- Non-Monetization, Monetization (Know your CoGS)
- Putting it all together



# QUICK POLL

Are you....

- A. Currently monetizing offers post-sale
- B. Being asked to monetize to improve my numbers
- C. Thinking of monetizing to show what we can do
- D. Sales owns all of revenue / CSMs don't want to sell



# Problem: CS Not Driving Value



- Both Customer & Company
- Poor Margins
- No Headcount
- Metrics Below Target
- CS as a Casualty



# Solution: Monetizing Your Post-Sales Offers



- You're already doing the hard work
- Be intentional
- Fit the need
- Be a bridge-builder
- 2% & 10%



# Pre-Reqs: Self-Assessment & Finding Friends



Assess where you are:

- P&L / Financials
- Know your company
  - CS Maturity
  - Product
  - Gaps you're filling (SMF)
- Know your customer
  - What's your mandate?

# Pre-Reqs: What's Your Mandate?



## What is your customer looking for you to provide?

Mandate	Description
Solution Ownership	Own the solution and achieving the outcome for them. Provider accountable and executes.
Thought Leadership	Expert insights on how to achieve the outcomes. Provider recommends; Customer approves and executes.
Operate	Run the solution to meet the goals & metrics. Customer governs and provider executes.
Support	Educate and guide on using the solution. Provider supports; Customer executes.

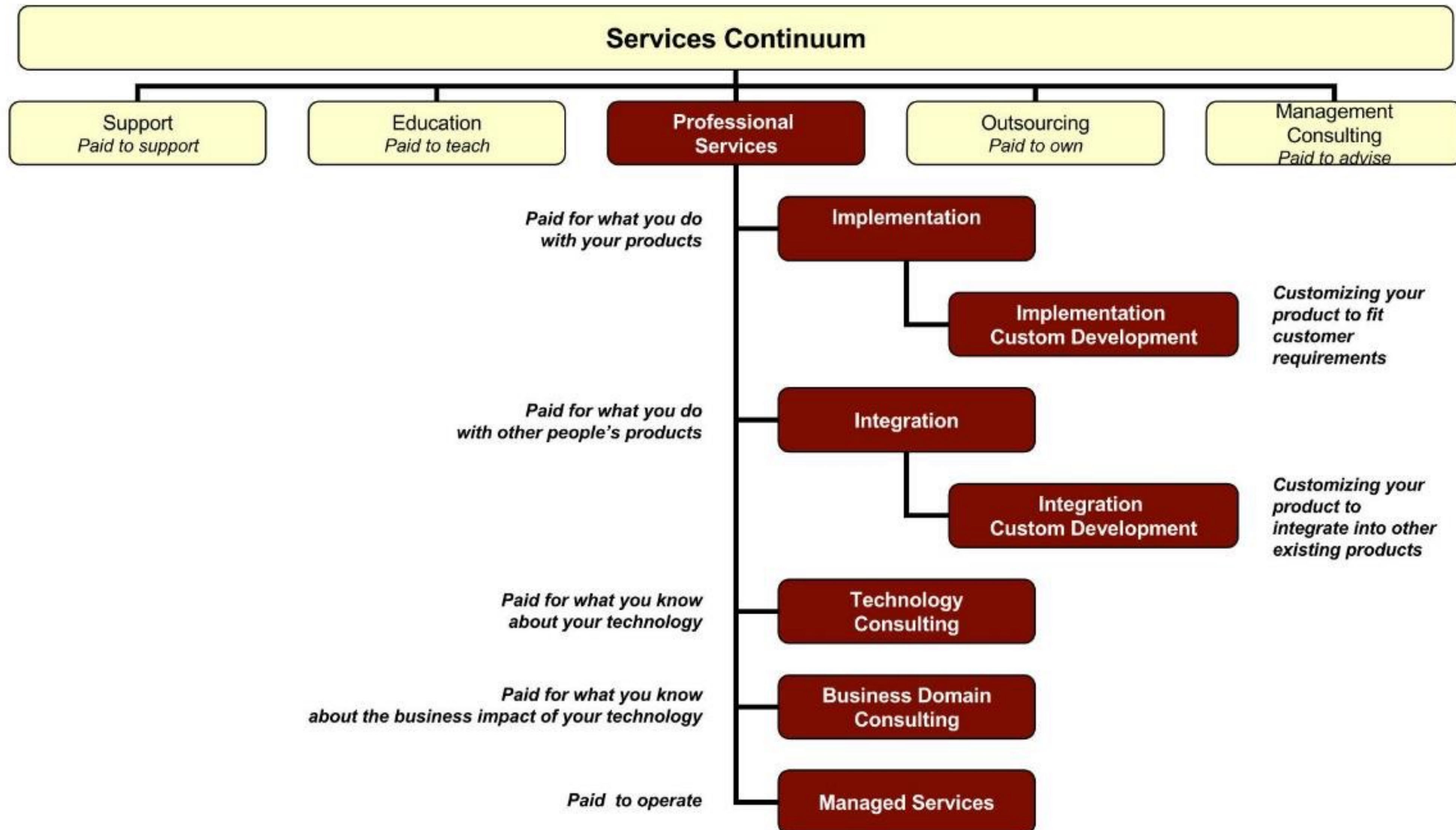


# Investigative Journalism\*: the 5 W's & an H





# Investigative Journalism\*: What Type of Offering?





# Investigative Journalism\*: What Does the Offering Include?



5 Ws & an H	Details
What it is	Description
What they get	Deliverables
Why they buy it	Value Proposition or Compelling Reason to Buy
Who decides to buy it	Targeted Buyer
How we deliver it	Delivery Phases
Where we deliver it	Delivery Model – On-site or Remote
Who needs to deliver it	Delivery Resource Requirements
How long it will take	Duration
How much will it cost	Pricing – both amount and model
How will we benefit from it	Retention Impact & Expansion Business Upside

*\* And a little bit of Product Management with a whole lot of discovery and iterations*



# Investigative Journalism\*: What Does the Offering Include?



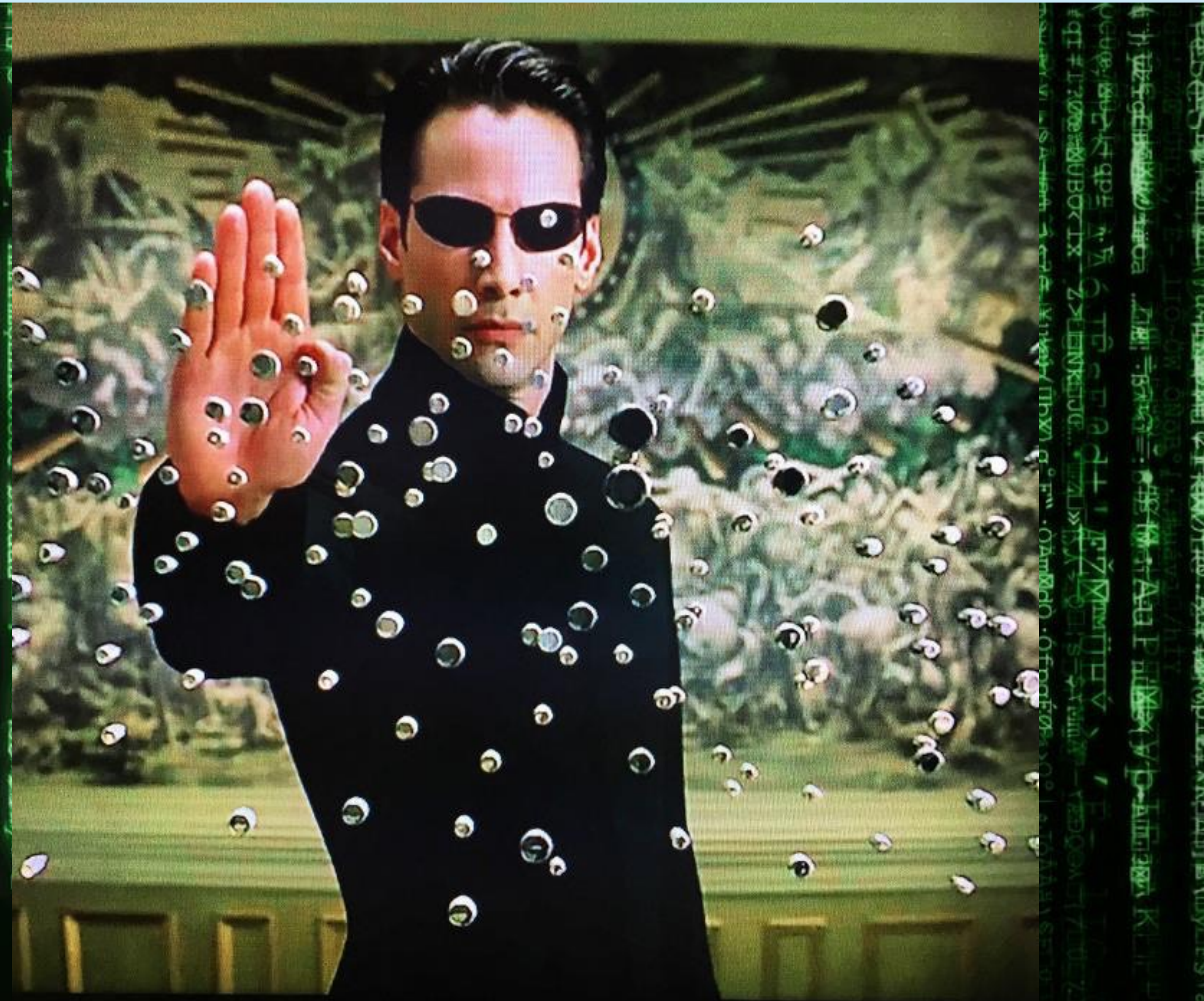
	Customer Success Solution Offering Overview
<b>Solution Offering Title</b> Updated dd-Mmm-20xx	
<b>Problem / Opportunity:</b> (What is wrong)	The customer needs to SOLVE THIS TYPE OF PROBLEM.
<b>Summary:</b> (What it does)	The SOLUTION_OFFERING_TITLE service offering helps customers quickly SUMMARY OF SOLUTION.
<b>Description:</b> (What it is)	SOLUTION_OFFERING_TITLE is an education, mentoring, support and consulting project which includes: <ul style="list-style-type: none"><li>BULLETED LIST OF WHAT IT IS IN PLAIN, NON-TECHNICAL LANGUAGE</li><li>THIS IS NOT A LIST OF THE DELIVERABLES</li></ul>
<b>Value Proposition / Compelling Reason to Buy</b> (What it means & why they buy it)	SOLUTION_OFFERING_TITLE will: <ul style="list-style-type: none"><li>Quickly provide PRIMARY VALUE PROPOSITION.</li><li>Ideal for customers TRYING TO SOLVE OR DO THIS.</li></ul>
<b>Deliverables:</b> (What they get)	This offering will deliver the following: <ul style="list-style-type: none"><li>BULLETED LIST OF SPECIFIC DELIVERABLES</li><li>THIS IS NOT A LIST OF SPECIFIC TASKS TO BE DONE</li><li>IF THERE IS A CONCLUDING REPORT USE THE NEXT BULLET</li><li>A SOLUTION_OFFERING_TITLE Report which details:<ul style="list-style-type: none"><li>Description of the customer's ENVIRONMENT SPECIFICS</li><li>List of any issues encountered during the project</li><li>Implementation and configuration details of the PRODUCT LINE</li><li>Summary of resource skills and development work review findings</li><li>Any recommendations for future improvements to add</li></ul></li></ul>

<b>Targeted Buyer</b> (Who decides to buy it)	NORMAL TITLE AND LEVEL OF BUYER PLUS WHAT THEY ARE RESPONSIBLE FOR
<b>Delivery Phases:</b> (How we deliver it)	<b>Pre-Engagement: Contracts and Planning</b> A properly executed Master Professional Services Agreement (MPSA) and Statement of Work (SOW) is required for this engagement.
<b>Delivery Phases – cont.</b>	A preparation conference call should take place between the account team and the customer team prior to the start of the engagement.  <b>Phase 1: PHASE TITLE (LOCATION – estimated #-# days)</b> The delivery resource will perform the assessment with the following steps:
	<ul style="list-style-type: none"><li>FORMAL TRAINING COURSE TITLE training course</li><li>FORMAL TRAINING COURSE TITLE training course</li><li>(Optional) FORMAL TRAINING COURSE TITLE training course</li></ul> Note: The training phase should be spaced out in parallel to phases 3 and 4 to allow the customer resources to better learn and then immediately apply their new skills.  <b>Phase 4: SOLUTION OFFERING Report (off-site – estimated 1-2 days)</b> The delivery resource will document the recommendation made as a result of the SOLUTION OFFERING TYPE..
<b>Duration</b> (How long it will take)	The engagement is estimated at ## to ## days (##-## days on-site, #-# days off-site) delivered by a single Technical Consultant.
<b>Delivery Resource Requirements:</b> (Who needs to deliver it)	This offering needs the following minimum qualifications: <ul style="list-style-type: none"><li>TITLE, level #</li><li>PRODUCT product positioning and concepts, level 3</li><li>PRODUCT implementation and education experience, level 3</li></ul> This offering may need the following optional qualifications, depending upon the scenario: <ul style="list-style-type: none"><li>PRODUCT implementation and education experience, level 4</li></ul>
<b>Pricing</b> (How much will it cost)	The engagement should be priced at ##-## days of time and material (T&M) services at the prevailing daily rate, plus travel and living expenses
<b>License Impact &amp; Progression Business</b> (How we benefit from it)	License Impact: This promotes adoption of: <ul style="list-style-type: none"><li>PRODUCT</li></ul>
	Progression Business - Licenses: This is baseline for future additional PRODUCT
	Progression Business - Services: This is the ba: OFFERING OR PRODUCT projects

\* And a little bit more Product Management



# GTM: Welcome to the Matrix – Target Well



- Categorize Offerings
- Separate Sales vs Delivery Story
- Targeted Solutions improve your credibility



# GTM: Welcome to the Matrix – Target Well



Journey Stage	Onboarding	Adoption	Optimize
Support (paid to support)			
Education (paid to teach)			
PS: Implementation (paid to for what you do with your products)			
PS: Integration (paid to for what you do with other people's products)			
PS: Tech & Domain Consulting (paid to for what you know about your technology & domain)			
Managed Services (paid to operate)			

- Align to where in the cust. journey



# GTM: Welcome to the Matrix – Target Well



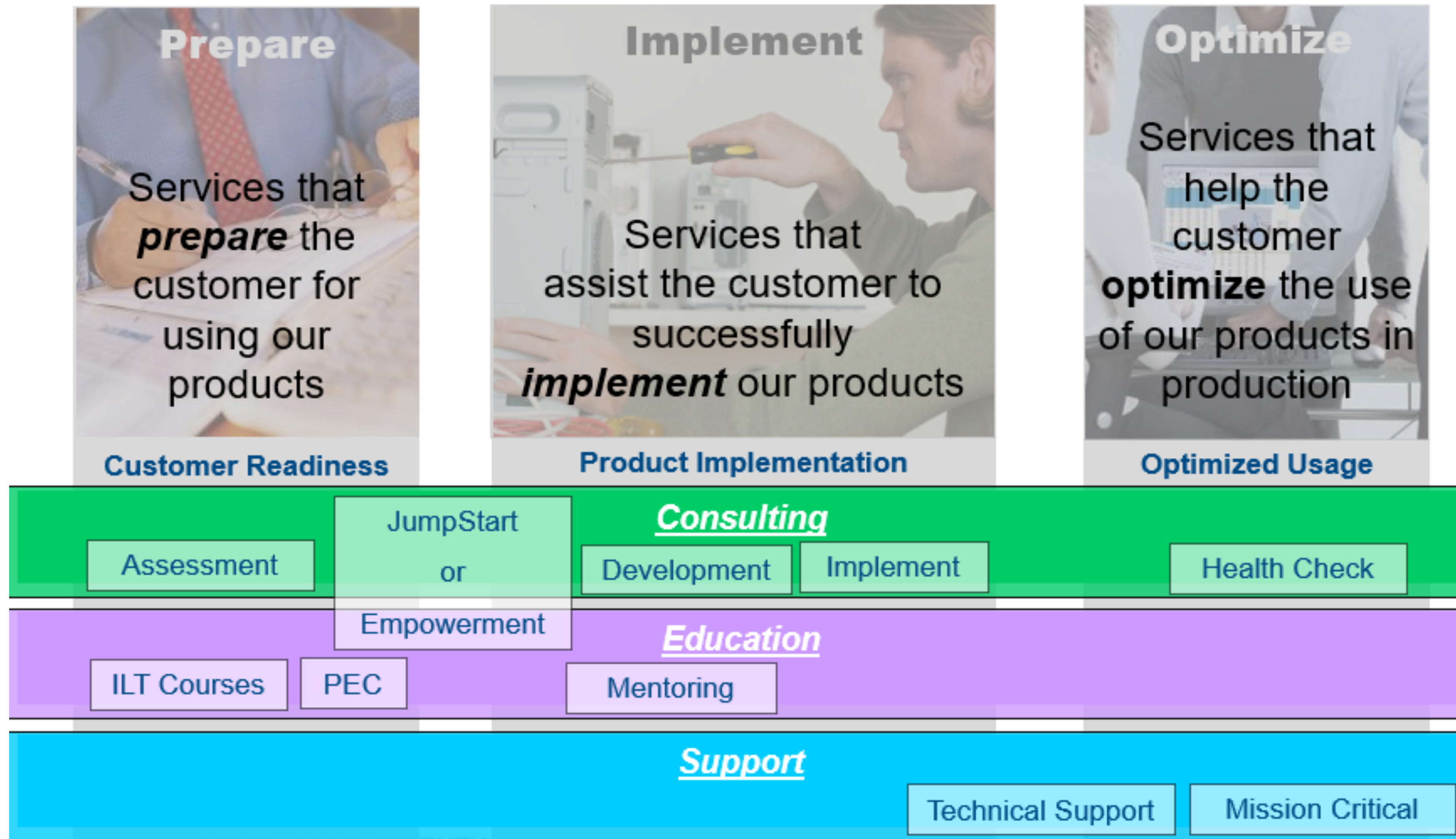
Mandate & Offering Type

Journey Stage		Onboarding	Adoption	Optimize
Support	Support (paid to support)			
	Education (paid to teach)			
Own	PS: Implementation (paid to for what you do with your products)			
	PS: Integration (paid to for what you do with other people's products)			
	PS: Tech & Domain Consulting (paid to for what you know about your products)			
Thought Ldr	Managed Services (paid to operate)			
Operate				

- Align to where in the cust. journey
- Consider your mandate
- Use the matrix to narrow down & target



# GTM: Welcome to the Matrix – Target Well



- Align to where in the cust. journey
- Consider your mandate
- Use the matrix to narrow down & target





# How Much Should I Charge?



- It depends....

		Custom Offer	Standard Offer
	Differentiated	Value based pricing <i>Managed services, adoption services</i>	Premium Pricing <i>Info services, premium support</i>
	Competitive Parity	Cost-based pricing <i>Professional Services</i>	Commodity Pricing <i>Core offers</i>



# Non-Monetization: Know Your CoGS



- Track costs by type of work
- Make friends in finance
- Don't pay for someone else's work



# Putting It All Together



Step 1:

- **Know why you're monetizing**  
Clean up your finances first (found money!)

Step 2:

- Do some self-reflection and assessment.
- **Know your Company** - Strengths, Weaknesses, Gaps
- **Know your Customer** - What's your mandate?
- **Know your team** - Who can help me plan it? build it?



Step 3:

- **Start with the things you are good at**
- Target things customers cannot or do not want to do (**go back to your mandate**)
- Capture how to deliver it, price it and bill for it
- Typical first offerings with highest value:
  - Adoption services
  - Premium support\*
  - Info/insights services\* (\* subscription these)





# Questions



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