



NICOLE ALRUBAIY

SVP CUSTOMER SUCCESS

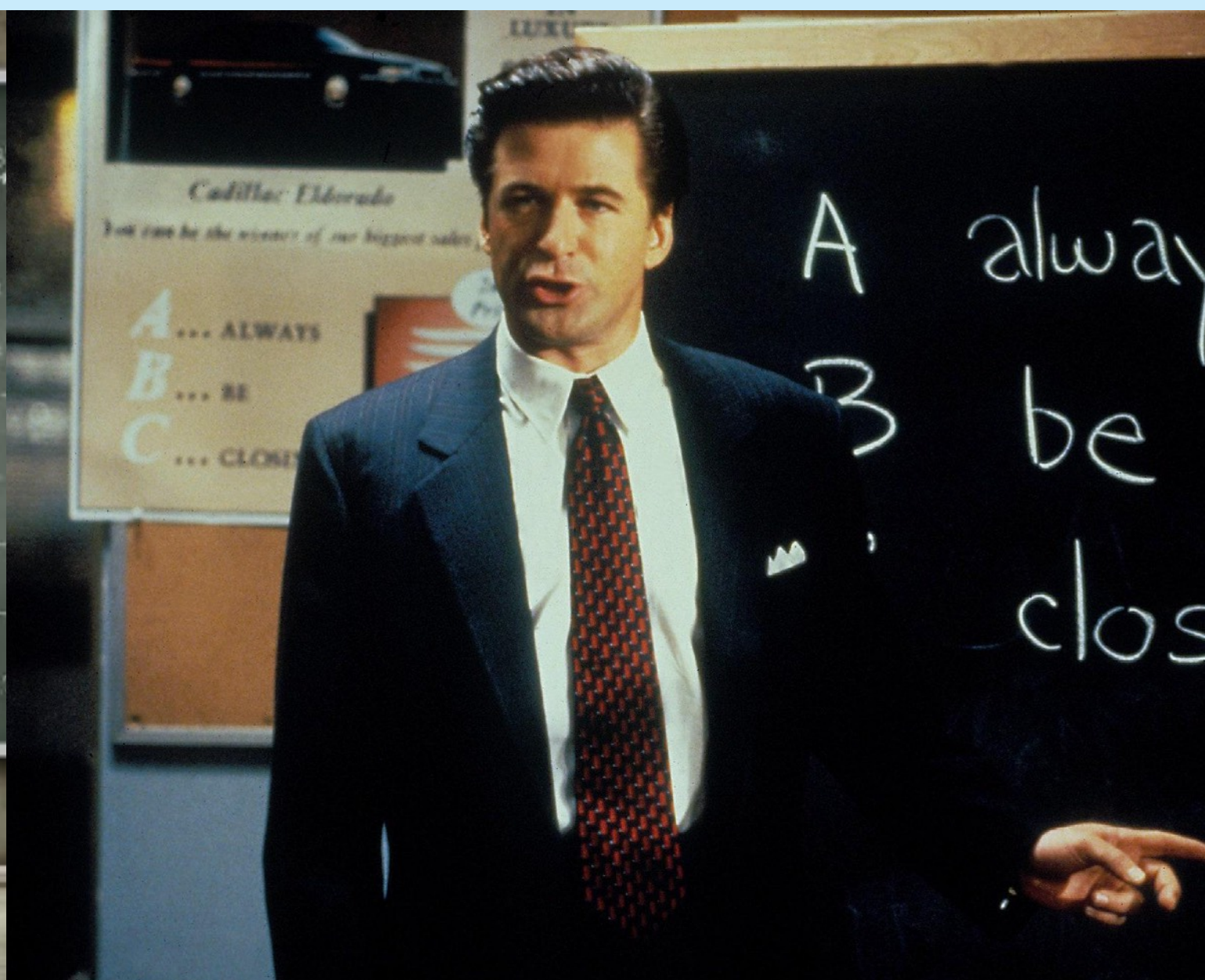
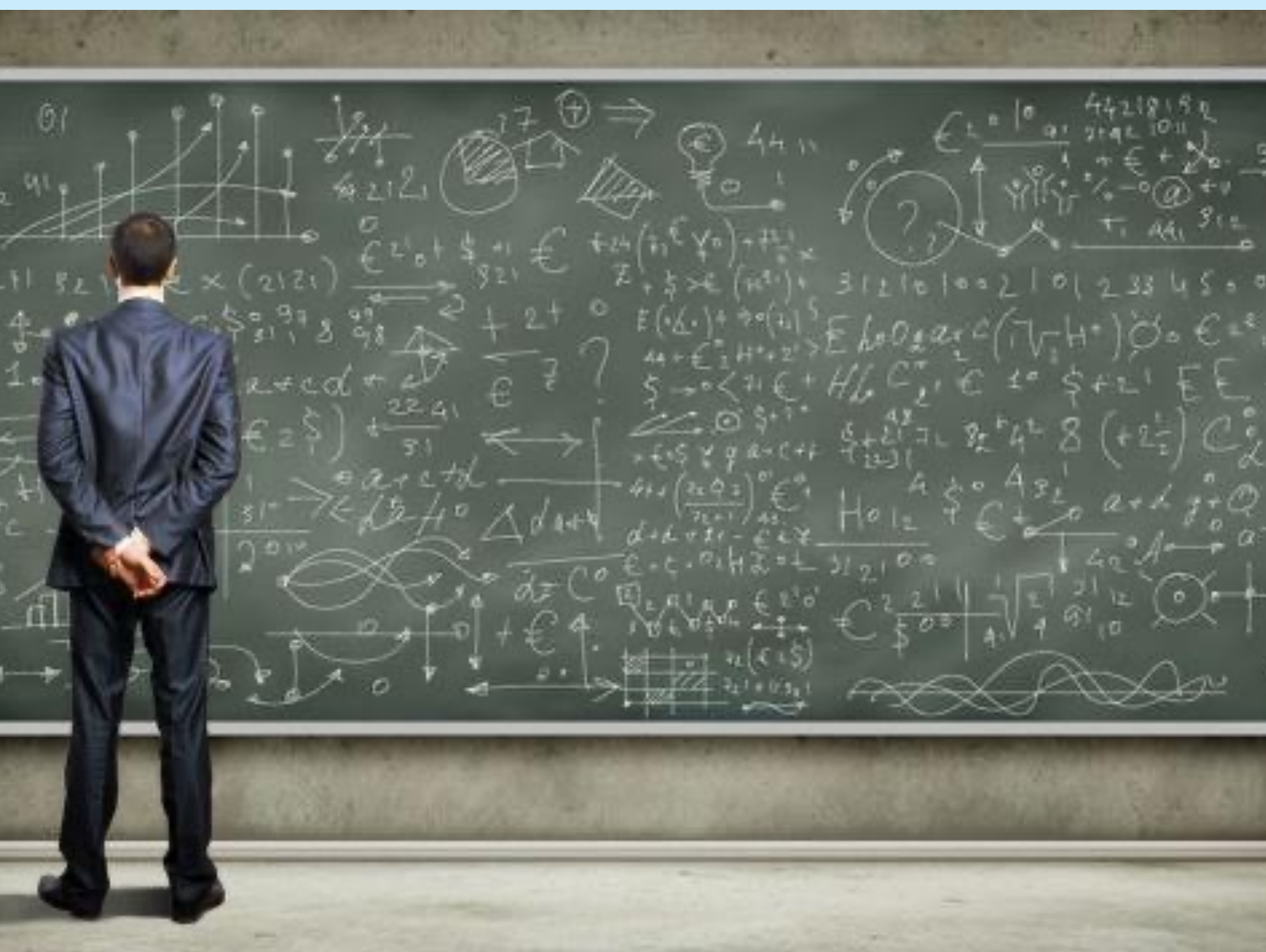
JELLYFISH

Max Retention

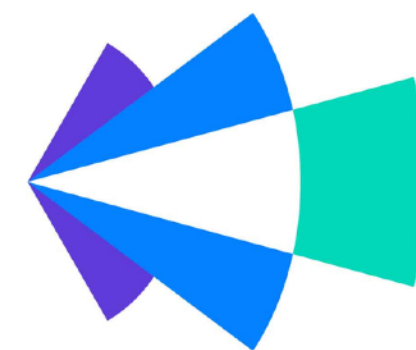
***A Tactical Guide To Aligning Your Company
Around Revenue And Customer Retention***



CS100SUMMIT



Why Listen to Me?



Clari



JELLYFISH

Dig Deep in Why

Make a Plan and Forecast

Storytelling: Past and Future

Repeat



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Dig Deep into Why



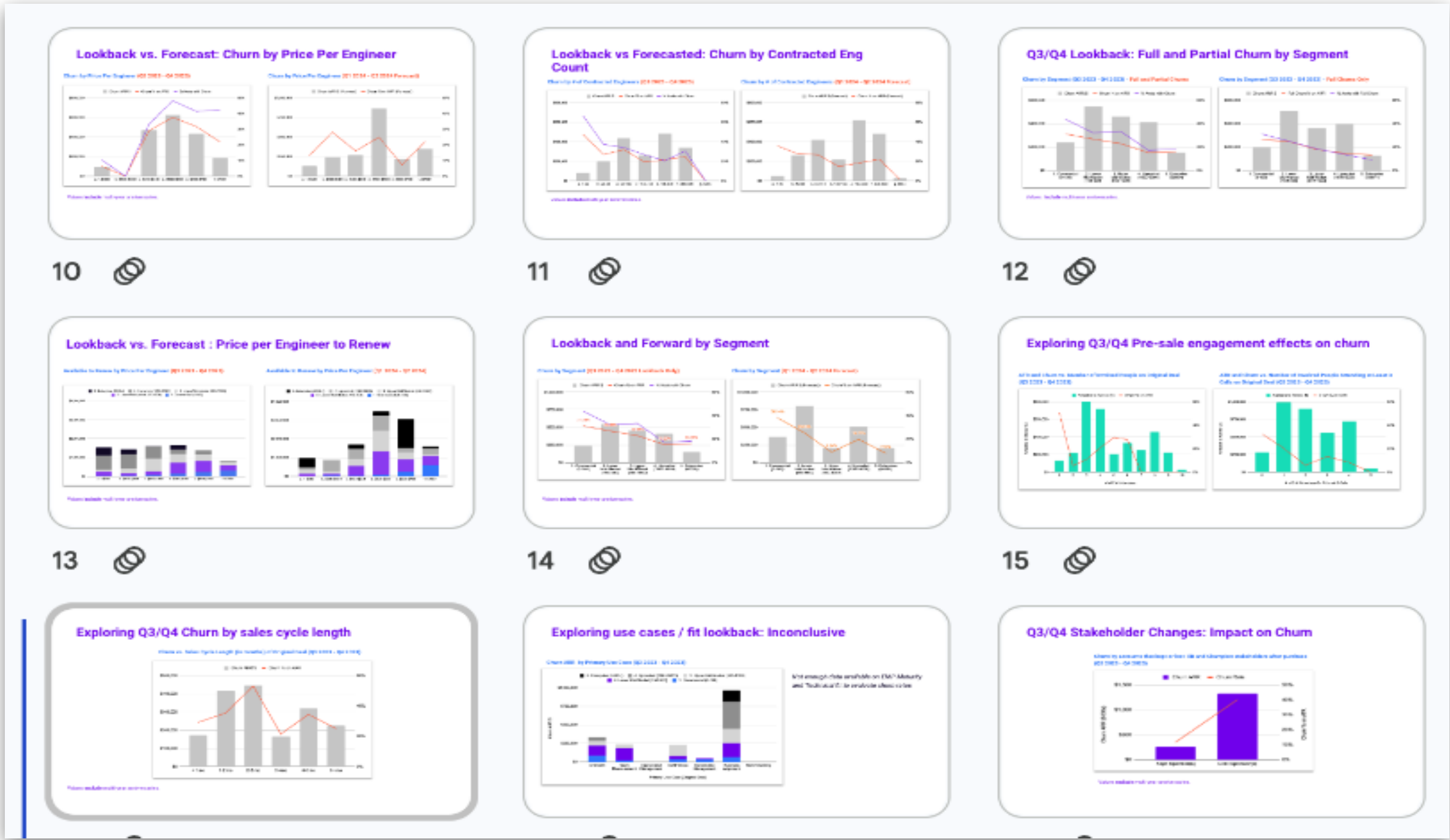
- 1. Review every churn in recent history
- 2. Build risk/churn reasons into CRM

Loss Reason Auto populates	Renewal Primary Risk Reason Pick One	Renewal Secondary Risk Reason Select All Applicable	Example Situation
Value Price Mismatch	Value Price Mismatch	Value Price Mismatch	Their weighted cost per engine
		Lack of Impact / ROI	ROI/Impact too low to renew
	Bought too many licenses	Bought too many licenses	Thought they needed 100 for
Launch and Adoption	Stakeholder Engagement	Engineering Managers Disengaged	Managers haven't engaged, no
		Economic Buyer Turnover	EB has changed
		Economic Buyer Disengaged	EB won't engage
		Champion Disengaged	Champion won't engage
		Champion Turnover	Champion has changed
		Single Threaded	We only have 1 solid relations
	Launch Issues	Only partially rolled out	Didn't roll out to the other 3 d
		Delayed onboarding	Onboarding took too long, not
	Product Engagement	Users not adopting	Rolled out but user adoption is
		Lack of product know how	Customer doesn't know how t
		Bugs/Poor Experience	Consistent bugs or data issues
	Maturity	Poor Jira hygiene	Customer's JIRA doesn't align
		Low EMP maturity	Customers biz process doesn't
Fit	Technical Fit (Platform or Data)	Technical Fit (Platform or Data)	They're moving off of JIRA
	Product - Lacking Features	Product - Lacking Features	They really needed a feature v
Economic	Economic Factors	Headcount Reductions	They cut 30% of their Eng staff
		Financial Issues	They're going bankrupt
		Acquisition	They were acquired by anothe

Spreadsheet Time!

- Pro Tips:
- Engage Finance or Ops for churn data
 - Show your work
 - Check results vs. Intuition

1. Find the Hotspots
2. Build 100 Cuts (You'll need them)
3. Draw Some Conclusions



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Forecasting Churn: Two Flavors

Pro Tips:

- Track changes to forecast fields
- Have YOUR forecast in addition to rep/manager
- Limit reactivity

Bottoms Up

At risk Yes/No
Risk Amount
Churn Fcst Amount
Risk Reason + Notes



Tops Down

Product Line
Segment
Health Score
Historical Actuals



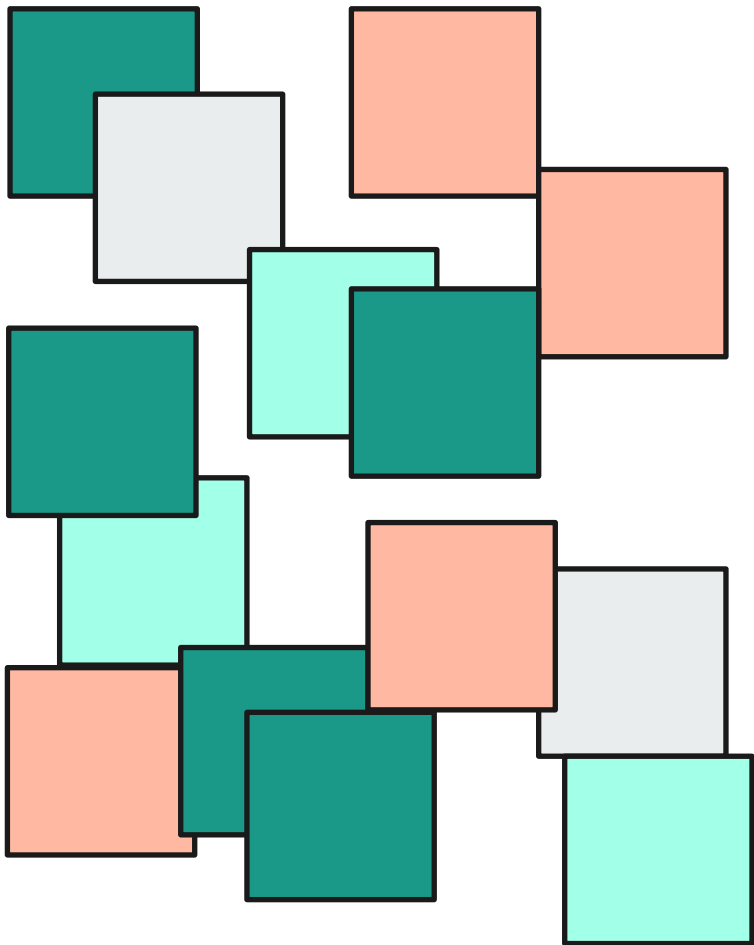
Make a plan



But Why?

What is Addressable?

How?
Brainstorm



Make a plan

Pro Tips:

- Bring people along *strategically*
- Engage the whole company
- Be Realistic



Big Categories	Root of the Problem	Solutions	Impact to Churn	Lift to v1	Begin	Target Complete v1	Leading Indicators to Watch	Churn Impact	Status	Ops Owner
Improve Engagement with Key Stakeholders	Not enough engagement with other stakeholders (single thread), messaging up/down-org on Why I Value	Better processes and data capture for multi-threading during sale (Customer Journey work)	Med	Med (20-60 hrs)	2024-Q1	5/1/2024	Exec engagement, engagement score, launch/adoption	2025-Q2	In Progress	Ryan
		Uplevel EBR process (and measure) and content to engage x-func leaders	High	Med (20-60 hrs)	2024-Q1	6/30/2024	Exec engagement	2024-Q4	In Progress	Nicole
		Clarify motions and roles in expanding relationships within existing accounts	High	Med (20-60 hrs)	2024-Q2	5/30/2024	[proposed] # of Execs engaged per account	2024-Q3	Planning	Nicole
	Not effectively scrubbing in new tech leaders (insights from JF)	Multi-thread and increase engagement across stakeholders in top customer accounts; measure engagement (Marketing angle)	Med	Light (< 20 hrs)	2024-Q2	5/30/2024	"Engagement score" by contact records (new)	2024-Q4	Planning	Kyle
		Improve signal, playbooks, reporting and supporting materials (e.g. CTO Welcome) for stakeholder transitions	High	Med (20-60 hrs)	2024-Q1	5/30/2024	Exec engagement	2024-Q4	In Progress	Nicole
Deliver a Measurable Impact Quickly	No consistent quick win / quick insight early in journey	Define and Measure time to first value(s) in Onboarding	High	Light (< 20 hrs)	2024-Q1	5/30/2024	[new] Time to First Value	2025-Q1	In Progress	Nicole
		Improve alignment of use cases to strong impact in deal cycle - orient the deals around what we do well	High	Heavy (80+ hrs)	2024-Q2	5/30/2024	Launch and adoption, engagement score	2024-Q4	In Progress	Ryan
	Jellyfish Impact isn't easily measured, clear to customers (or our team)	Product support							Deferred	Krishna
		Customer Journey				5/30/2024	[proposed] % accounts with JF	2024-Q4	Planning	Nicole
		Target DFO ad			7/15/2024		DFO Adoption	2024-Q4	Not Started	
Bolster Adoption of the Masses Reduce Dependency on the Few	Poorly messaged roll-outs - comms, making sure ppl engaged and bought in at multiple levels Big Brother news	Improve rigor d				4/15/2024	Launch and adoption, engagement score	2025-Q2	Complete	Ryan
		Improve playbo				5/15/2024	Time in Onboarding	2025-Q2	Planning	Nicole
	Users (esp. non-exec) don't understand how to turn JF insights into action	v2 Roll-Out and messaging)				6/30/2024	Product Engagement Score (Breadth)	2024-Q4	Not Started	Nicole
		Firm up IC use				9/30/2024	IC and Manager NPS	2025-Q4	Not Started	Krishna
Create a Retention Focused Culture at Jellyfish	Not engaging users directly to drive their adoption (and data not actionable yet)	Produce + Distribute more educational content tying Jellyfish insights to action	Med	Med (20-60 hrs)	2024-Q2	7/30/2024	Product Engagement Score (Depth) Views of the content	2024-Q4	Planning	Nicole
		Understand key stickiness indicators in usage data thru Persona lens (e.g. Managers using monthly = sticky) and build motions to support	High	Med (20-60 hrs)	2024-Q1	5/31/2024	Identified 2 personas Mapped at least 1 use case to each Built motion for use case - persona	2025-Q1	In Progress	Krishna
		Plan for how to action persona-related data across functions (marketing to them, leveraging the data in CS motions, etc.)	High	Med (20-60 hrs)	2024-Q2	5/15/2024	Views of the outreaches Product Engagement Score (Breadth and Depth)	2024-Q3	In Progress	Nicole
	Product confusing	Improve Info Architecture in Jellyfish	Med	Heavy (80+ hrs)	2024-Q1	5/31/2024	WAU for new cohorts	2024-Q4	In Progress	Krishna
		Improve New User experience in Jellyfish	Med	Heavy (80+ hrs)	2024-Q1	5/31/2024	New user return rate	2025-Q2	In Progress	Krishna
Create a Retention Focused Culture at Jellyfish	Ops Team lacks visibility to GRR impacting numbers	Reporting on customers falling off path (e.g. EBR, Onboarding, Usage problems)	Med	Med (20-60 hrs)	2024-Q2	4/30/2024	Ops team sentiment	2024-Q3	In Progress	Nicole
	We don't broadcast learnings from Churn	Highlight churn stories via anti-gong slack channel and/or retrospectives on accounts that churn w/ x-func	Med	Med (20-60 hrs)	2024-Q1	5/15/2024	Ops team sentiment	2024-Q3	Planning	Nicole

Sample Max Retention Plan



Important: Stop the Leak



Address in-flight risks

- Obsess over risk signals
- Visibility on Churn Forecast
- Heal Desk / Swarm
- Throw execs in the mix
- Coach the team



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Storytelling: We can do this!



Executive Team

Success Team

Whole Company

Board



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Maintenance

Weekly

Forecast Review
New Risks Review
Heal Desk
Lite Program Updates

Monthly

CRM Churn Clean-Up
Recent Churns Review
Heavy Program Updates
Reassess Forecast

Quarterly

Educate the Company
Assess Annual Forecast
Refresh Churn Analysis
Reprioritize Initiatives
Assess Churn Codes





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