

**Thank you for joining us today,
we'll be starting shortly!**

client **success**

REDUCE CHURN. INCREASE EXPANSION.
MAXIMIZE REVENUE.

CUSTOMER SUCCESS LEADERSHIP BOOTCAMP

PART I: HOW TO DESIGN YOUR CUSTOMER JOURNEY

TUESDAY, AUGUST 3, 2021
1PM EST/ 10AM PST



KRISTI FALTORUSSO

VP of Customer Success
ClientSuccess

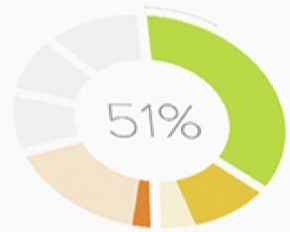
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Recreational Equipment, Inc.

AMOUNT \$75,000 OPEN \$0 SEGMENT Enterprise SALES REP 164/1600
MADE \$6,250 ACY \$75,000 CSM Dave Blake SPEC

SuccessCycle



Start	3 Nov 2014
Onboard (6/6)	14 Nov 2014
Deploy (4/5)	28 Nov 2014
Adopt (1/12)	No due date
Grow (0/9)	No due date
Renew (0/4)	6 Mar 2015



Engagement (6-4)

Search	23 Aug @ 3:47 pm
Janet Williams Vortex project kick-off Had a meeting Lance Springer and Bob Maxwell to discuss their Vortex deployment. They're excited about what is coming...	Roger Hamilton Vortex project kick-off
Janet Williams, Blake Shelton (?) Weekly check-in	Yesterday Lance is out of town but I spoke with Bob. He's used the new resource planning feature each day this past week and is really enjoying how



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WHAT IS A CUSTOMER JOURNEY?

A map of engagements and activities that guide your customers through the partnership while focusing on their achievement of value realization.

CUSTOMER JOURNEY OBJECTIVES

Provide a prescriptive and intentional journey for your customers to ensure a successful, long-term, predictable and mutually beneficial partnership.



Bridge the gap
between
cross-functional
teams



Better
understanding
of your
customers



Establish
mutual
alignment with
your
customers



Predictive
patterns of
behaviors



Opportunities
to delight your
customers



Built in Voice
of the
Customer

5 STEPS TO BUILD YOUR CUSTOMER JOURNEY



USE AN
OUTSIDE-IN
APPROACH



DEFINE THE
KEY
MILESTONES



ALIGN ON
OWNERSHIP



SHARE WITH
YOUR
CUSTOMERS



MEASURE
AND
OPTIMIZE



USE AN OUTSIDE-IN APPROACH

Start designing your customer journey from the viewpoint of your customer. Begin by listing out all of the steps they will need to go through in order to advance to the next stage. Go as far as interviewing a customer and designing the journey with them to ensure their voice and needs are accounted for.



DEFINE THE KEY MILESTONES

Map out the key milestones along the journey map. These are the points in time that will have meaningful impact on the partnership and your customers. These milestones can be tasks, activities, achievements etc. Make sure that they are milestones that will be meaningful to all customers.



ALIGN ON OWNERSHIP

Every step in the journey should have a clear owner. Some organizations go as far as building out a RACI model to use alongside their journey which helps organizations understand who is responsible, accountable, consulted and informed on the various tasks. Some actions will be owned by your customer so make sure you are crystal clear on this.



SHARE WITH YOUR CUSTOMERS

Transparency is key. Make sure to design a customer journey you feel proud to share with your customers that will evoke excitement and confidence in the partnership. Your customers should have a solid understanding on what will happen, when and why. It will help keep both parties stay accountable.



MEASURE AND OPTIMIZE

It's critical that you have the ability to track your customer through the journey. Outline clear entrance and exit criteria by stage and have the ability to indicate if each of the milestones has been completed or achieved. Beyond tracking and measuring the journey it's important to go back and make the necessary adjustments to optimize it over time.

CUSTOMER JOURNEY AT CLIENTSUCCESS

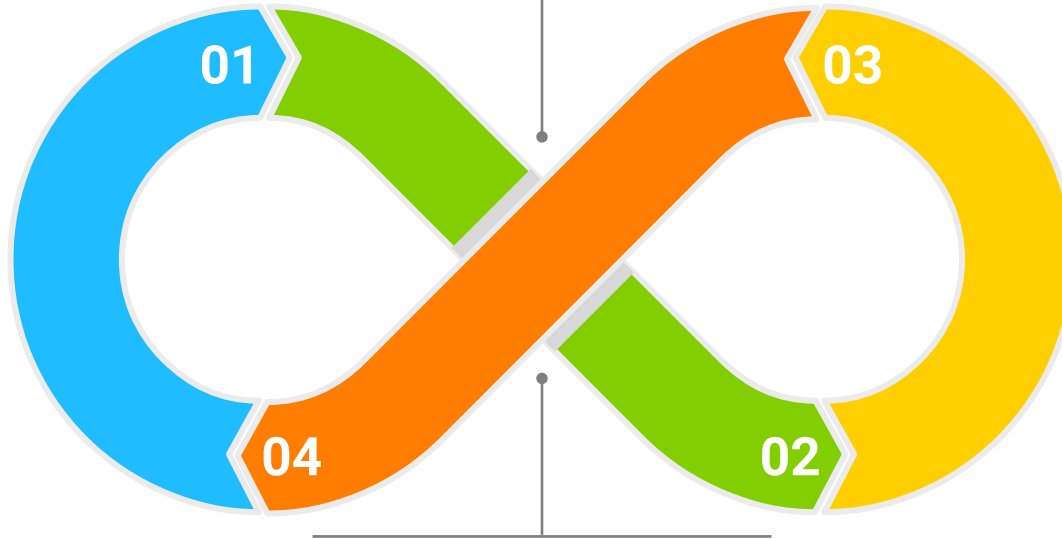
CUSTOMER JOURNEY STAGES

2. EXECUTE

Customer and User onboarding and training.
Assist with strategy and configuration to align with
core use cases. Establish an initial win.

1. ALIGN

Confirm success criteria and
align on measurement of KPIs.
Set proper expectations for the
partnership and establish clear
roles and responsibilities.



3. REALIZE

Customer has adopted
ClientSuccess into their workflow.
Product usage is in line with their
business objectives and they are
working towards their goals.

4. ADVOCATE

Customer has expressed their intention to
renew and/or grow and has agreed to serve
as an advocate for ClientSuccess.

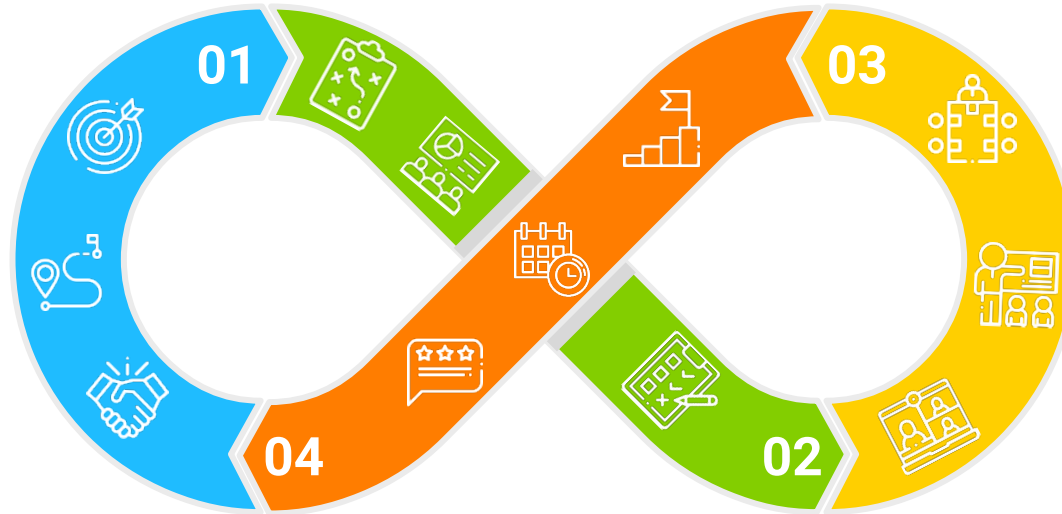
CUSTOMER JOURNEY

1. ALIGN

- Welcome email
- Complete prep documents
- Partnership kickoff meeting
- Goal and Expectation setting
- Onboarding Preparation

4. ADVOCATE

- Case Study
- Customer Advocacy
- Engagement - Referral & Reference
- Customer Reviews
- Renewal and Growth Plan



2. EXECUTE

- Onboarding kickoff
- Platform configuration
- Training and Enablement
- End User Training
- Post-Onboarding Review

3. REALIZE

- Recurring strategy sessions
- Program management
- Best practice recommendations
- Customer Objective Review (COR)
- Success Stories

ALIGN

Days 0-5

Confirm success criteria with the customer and align on measurement of KPIs. Set proper expectations for the partnership and establish clear roles and responsibilities.

Objective:

Mutual alignment between ClientSuccess and the customer on their success criteria and partnership expectations.

Entrance Criteria:

- Signed contract – New customer or existing customer post renewal/upsell

Exit Criteria:

- Confirmed business goals with the customer
- Baseline benchmark of KPIs
- Mutual alignment of partnership expectations and requirements
- All pre-onboarding materials received and complete
- Onboarding kickoff call scheduled

EXECUTE

Days 6-60

Customer and User onboarding and training. Assist with strategy and configuration to align with customer use cases. Establish an initial win.

Objective:

Onboard the customer and train the end users on how to leverage ClientSuccess to achieve their business goals. Configure the platform to align with their core use cases.

Entrance Criteria:

- Confirmed business goals with the customer
- Baseline benchmark of KPIs
- Mutual alignment of partnership expectations and requirements
- All pre-onboarding materials received and complete
- Onboarding kickoff call scheduled

Exit Criteria:

- Platform configured in accordance with their business goals and requirements
- End user training and enablement completed
- Onboarding sessions concluded with a successful review and neutral to positive survey score

REALIZE

Days 61 - 245

Customer has adopted ClientSuccess into their workflow. Product usage is in line with their business goals and are working towards their goals.

Objective:

Customer has adopted ClientSuccess into their workflow and process and have operationalized their CS Program through the platform. Have achieved a meaningful win.

Entrance Criteria:

- Platform configured in accordance with their business goals and requirements
- End user training and enablement completed
- Onboarding sessions concluded with a successful review and neutral to positive survey score

Exit Criteria:

- Customer has regular adoption of the platform
- Have had engagement with with their Executive stakeholder(s) who have confirmed that they are seeing value from the platform AND partnership
- Achieved meaningful win which aligns with their goals and objectives
- Have completed NPS survey and CSP has followed up on the feedback

ADVOCATE

Days 246 - 365

Customer has expressed their intention to renew and/or grow and has agreed to serve as an advocate for ClientSuccess.

Objective:

Customer has confirmed that they have achieved value from the partnership aligned with their business goals. Renewal and growth discussions have been favorable and we have a known champion advocating for ClientSuccess.

Entrance Criteria:

- Customer has regular adoption of the platform
- Have had engagement with with their Executive stakeholder(s) who have confirmed that they are seeing value from the platform AND partnership
- Achieved meaningful win which aligns with their goals and objectives
- Have completed NPS survey and CSP has followed up on the feedback

Exit Criteria:

- Customer has executed a renewal or upsell
- Champion has agreed to serve as an advocate on our behalf
- Prepared to align on new goals and priorities

THANK YOU