

Freedom and Control for Customer Success Leaders



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client**success**

What would you do with an extra day during your workweek?



One strategy to rule them all



Worksheet:

bit.ly/csfreedomandcontrol



What is a system?



Be Real and Honest



Escalations



Drop Everything



Escalations System in Place



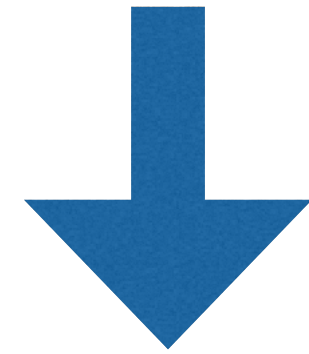
Escalations System
Could Be Run By
Someone Else Today



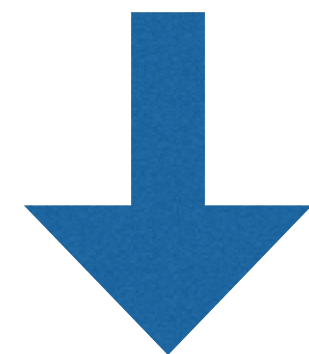
A System has 3 Main Components



Inputs



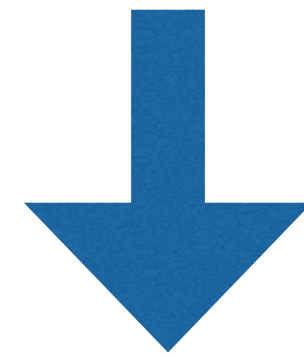
Actions



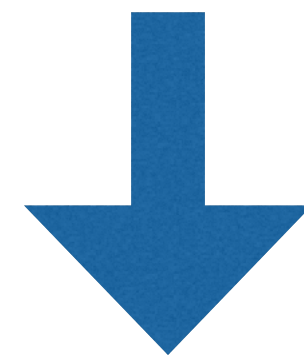
Outputs



Inputs



Actions



Outputs



Trigger Events



Exec sponsor leaves

Low NPS

Product issue

Product usage level

...

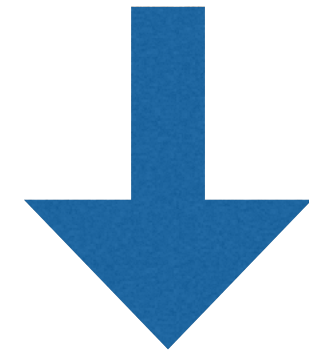
Email from the CSM



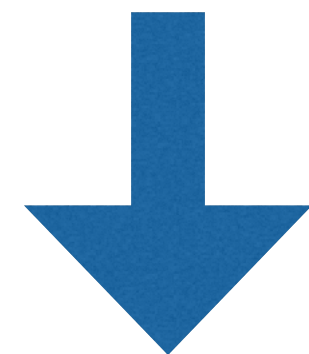
What's the structure of the inputs?



Inputs



Actions



Outputs



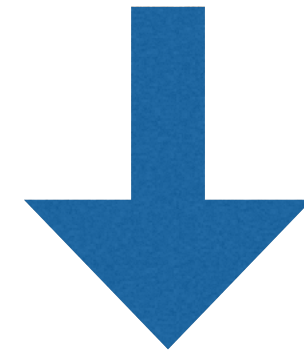
Step 1: Prioritization



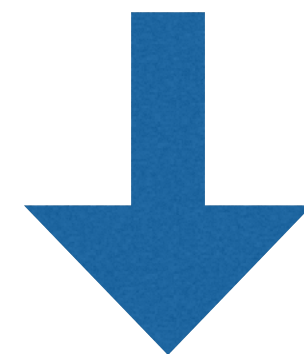
Step 2: Processing/Acting



Inputs



Actions



Outputs

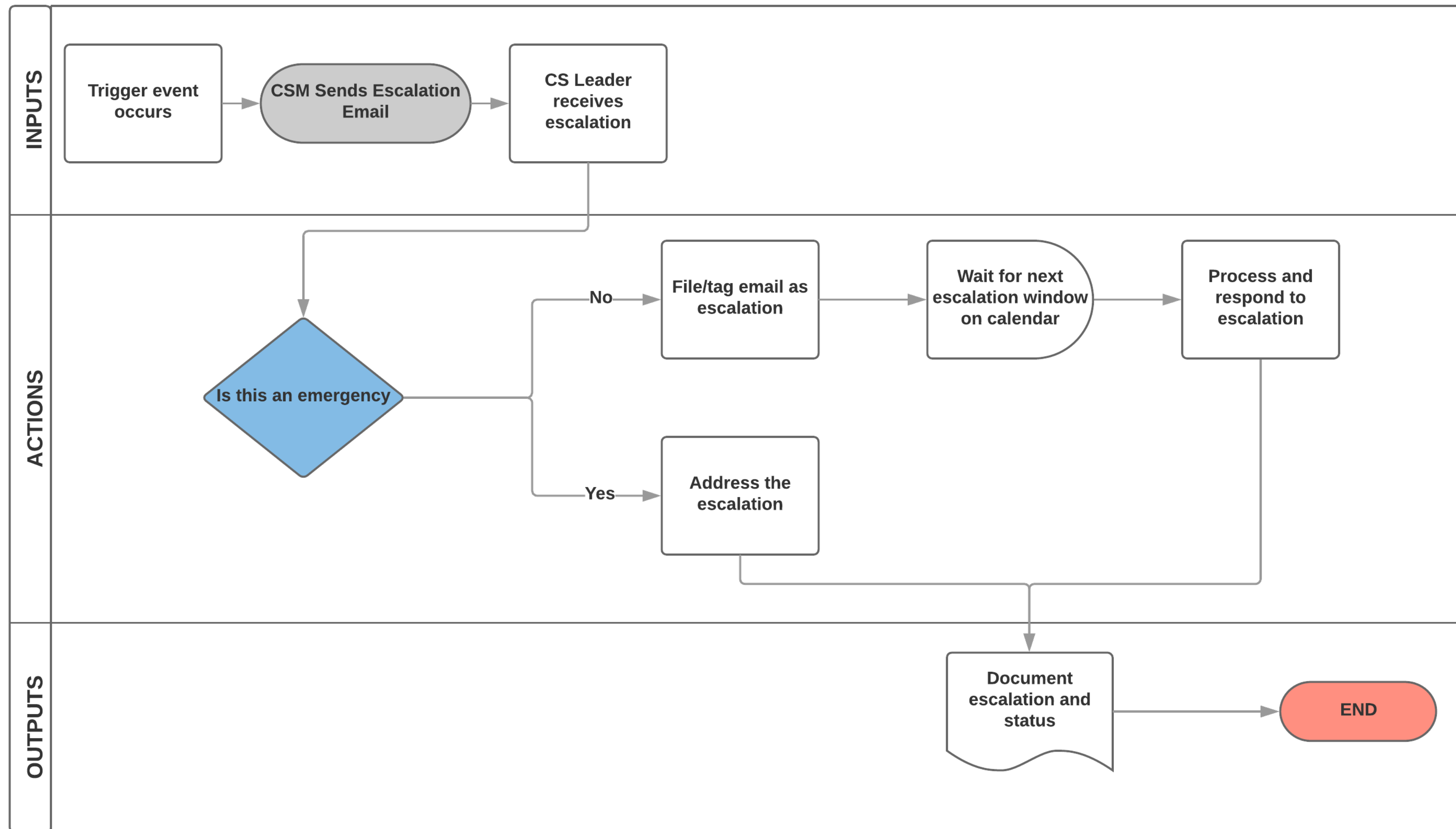


Your Response and Next Steps



Tracking the Status of the Escalation





Which area will you

- 1) Take control
- 2) Build a system

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