

CUSTOMER SUCCESS LEADERSHIP BOOTCAMP

Customer Off-boarding and Exit Interviews to End on a High Note



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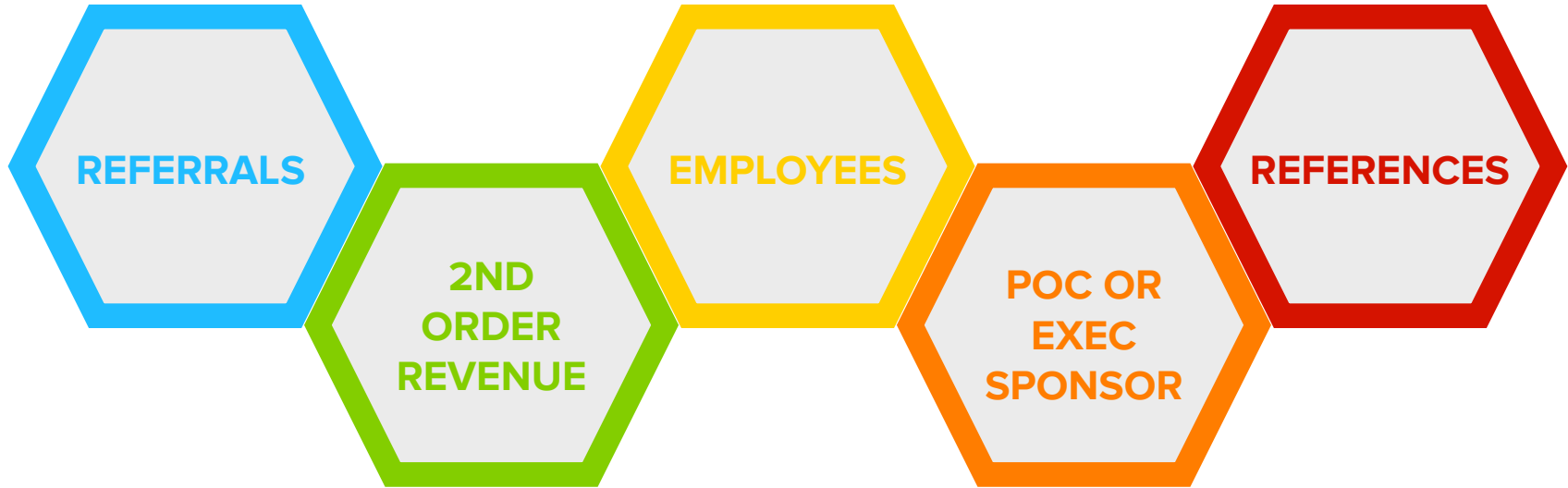
TUESDAY, OCTOBER 19, 2021
1PM EST/ 10AM PST

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**WHY IS IT IMPORTANT TO
INVEST IN CUSTOMER
OFF-BOARDING AND
EXIT INTERVIEWS?**

CUSTOMERS WHO LEAVE CAN BE ...



**ARE YOU HOLDING THE
DOOR OPEN FOR YOUR
CUSTOMERS?**

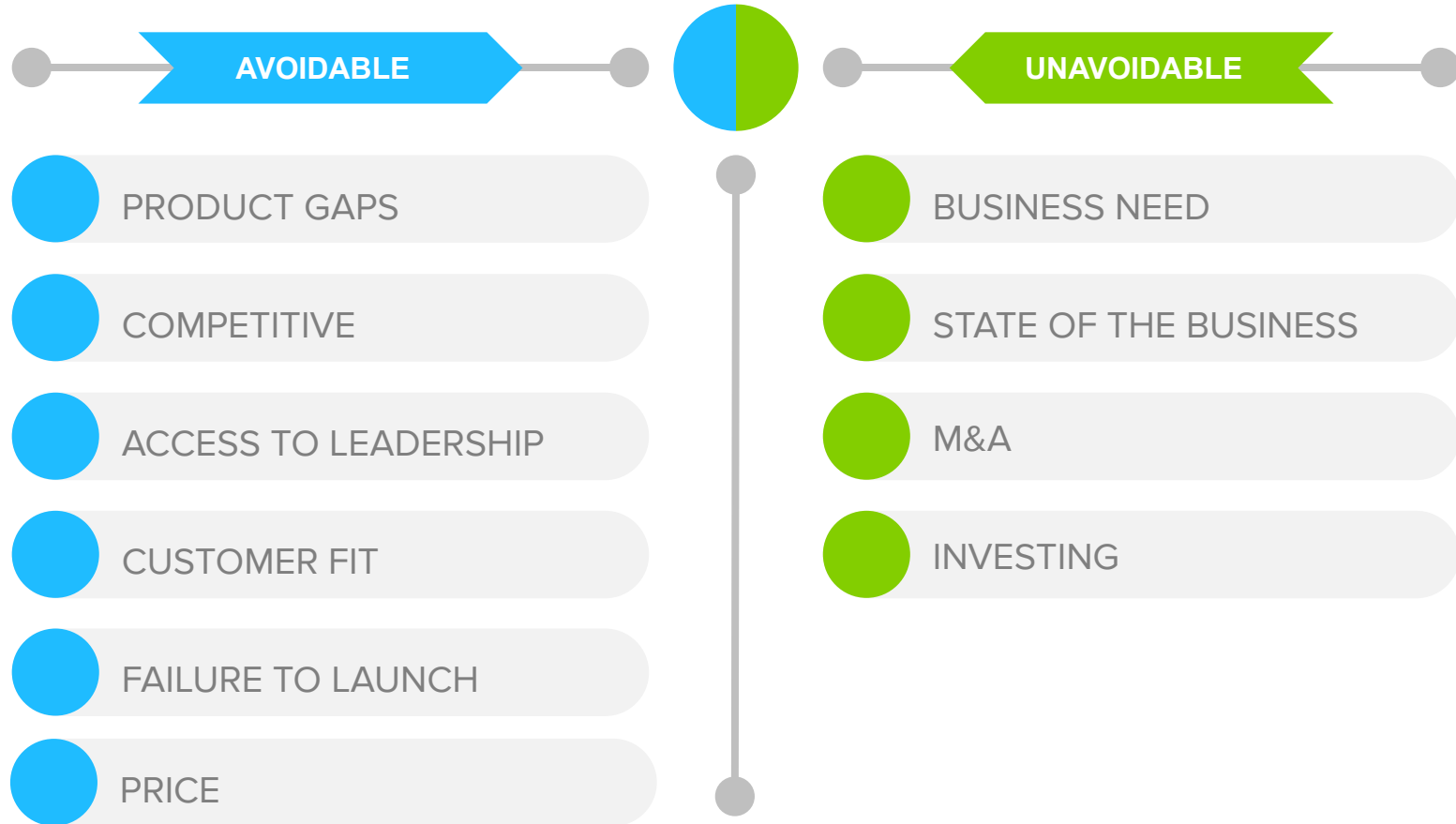


“I’ve learned that people will forget what you said, people will forget what you did, but people will never forget how you made them feel.”

-MAYA ANGELOU

**CUSTOMERS RENEW AND
GROW WHEN THEY ACHIEVE
VALUE (ROI) AND HAVE A
GOOD AND CONSISTENT
EXPERIENCE.**

CHURN ATTRIBUTES



MANAGING CUSTOMER CHURN



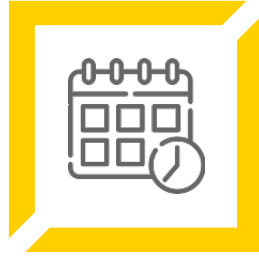
PROPOSE A SAVE PLAN

As the CSP on the account, it's your responsibility to do everything possible to retain your customers. Even when your customer has communicated their intention to leave, you have to see if there is anything you can do.



ESTABLISH TIMELINES

Whether or not there is a plan to preserve the partnership, you will need to establish a timeline for what will happen next. There will likely be a series of tasks and activities that will need to be managed.



SCHEDULE OFF-BOARDING

Off-Boarding will include actions like exporting data, turning off access, deleting the tenant/instance, and then destroying the data.



MANAGE CUSTOMER COMMUNICATION

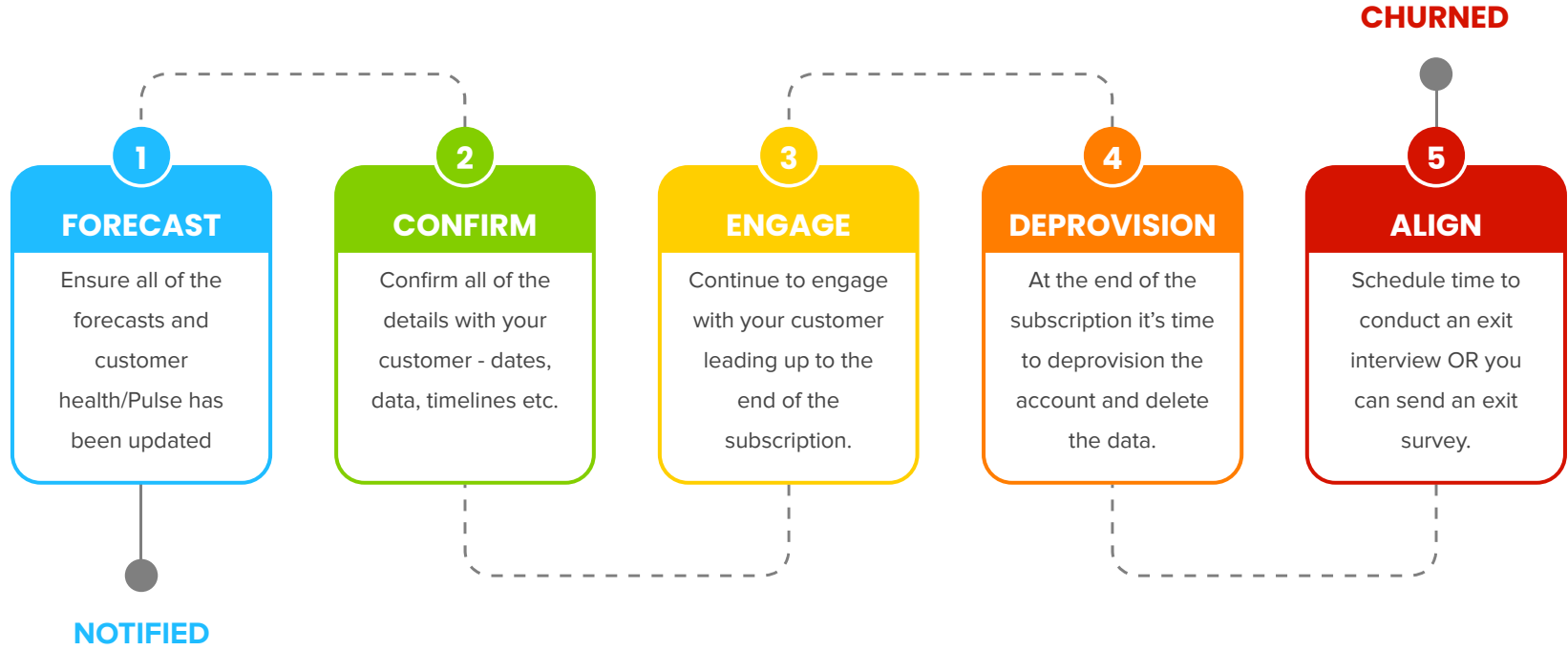
Communication to your customer should be managed before and after their end date. On the day their subscription ends, it's time to part ways. You need to communicate that everything has been turned off and give details on next steps.



EXIT INTERVIEW

Set up an interview with your customer as the partnership is coming to a close or once things have concluded. The interview should not be about why they left, you should know this already, this should be to hear their overall feedback on product and partnership.

DESIGNING YOUR PLAYBOOK



Lifecycle: Customer Churn Process and Off-Boarding



Cycle Active

Process for completing all formal steps following a customers communication to not continue the partnership

⊖ Collapse all

⊕ Expand all

+ Add stage

☰ ▶ **Intention to Not Renew Communicated** (2)

Due date ...

☰ ▶ **Customer Communication** (2)

Due date ...

☰ ▶ **Engage** (1)

Due date ...

☰ ▶ **Deprovision the Account** (1)

Due date ...

☰ ▶ **Align** (1)

Due date ...

+ Add new stage...

☰	▼ Intention to Not Renew Communicated (2)	Due date ...
☰	▶ After the customer has expressed intention to not renew (3)	Due date ...
☰	▶ Adjust the Forecast (3)	Due date ...
	+ Add new activity...	
☰	▼ Customer Communication (2)	Due date ...
☰	▶ Memorialize the discussion and next steps (3)	Due date ...
☰	▶ Communicate Important Details, Dates and Timelines (2)	Due date ...
	+ Add new activity...	
☰	▼ Engage (1)	Due date ...
☰	▶ Monthly Check-Ins (5)	Due date ...
	+ Add new activity...	
☰	▼ Deprovision the Account (1)	Due date ...
☰	▶ Once the End Date is Here (5)	Due date ...
	+ Add new activity...	
☰	▼ Align (1)	Due date ...
☰	▶ Host the Post-Churn Interview (3)	Due date ...

EXIT INTERVIEWS TO PROMOTE GROWTH

INCREASE LONG TERM NET AND LOGO RETENTION

Understanding why customers go is as important as understanding why they leave. If you can address thematic issues you can get ahead of churn and promote a growth model.

PEOPLE AND PROCESS

At times, your inability to provide your customers with the service and support necessary to drive their success. Listen for opportunities to coach your team and enhance your processes.



FEED PRODUCT ROADMAP AND FUNCTIONALITY

Customers and former customers have a lot of real world feedback on the product. Allow customers as they leave to provide feedback, challenges and successes to feed the roadmap.

EXIT INTERVIEW PROCESS



Make sure you are clear on who will manage the interview. Having someone other than the CSP might facilitate a more transparent discussion.

Exit interviews should be no longer than 30 minutes - treat time as currency. Make sure to schedule the meeting with correct person, not just the most senior.

Prepare for the discussion. Make sure to have all of the details about the customer and their decision; do not ask them to repeat things you know - go deeper.

This discussion should be led with gratitude, remember feedback is a gift. Be open minded and open hearted. If possible provide them with a token of appreciation.

SAMPLE EXIT INTERVIEW QUESTIONS

PEOPLE

- Describe your engagement with our teams.
- How instrumental was the Customer Success team in helping you drive value from the partnership?
- How would you describe your interactions with our support team?
- What could we have done better to support you and the team?
- What should our team stop doing right now?

PROCESS

- Describe your onboarding experience.
- How would you describe your experience doing business with us?
- What were the biggest points of friction in the partnership?
- Can you share with me things you felt we did exceptionally well?
- What process would you recommend I focus on enhancing for customers?

PRODUCT

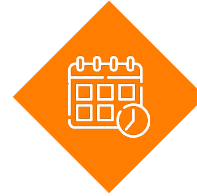
- Describe your experience using our platform.
- What were the most challenges workflows for the team?
- If you had a magic wand, what one feature would you build or enhance?
- What aspects of the platform will you miss?
- How would you describe your level of expertise in using the technology?

END USER SURVEY



KEEP THE QUESTIONS BROAD

Remember if you are sending this out to various end users with different use cases and needs, make sure the questions are applicable.



BE TIMELY

Be sure to send this out as soon as possible. I would recommend sending this out within 24 hours of the subscription end date.



DETERMINE THE BEST FORMAT

Do you want rating information, short answer, scale etc. What will be the most valuable for your business?



BE GENUINE

Share with them how you intend to use the information to improve or enhance your business. If possible send out future communication as you make changes based on their feedback.



KEEP IT SHORT

This should not take more than 5-10 minutes to complete. Remember, time is currency - KISS.



EXPRESS GRATITUDE

Your customers are not required to complete this survey so keep expectations low. But for anyone willing to take the time, find a way to express your appreciation.

Q



A