CUSTOMER SUCCESS LEADERSHIP BOOTCAMP

DESIGNING PLAYBOOKS TO POWER YOUR CUSTOMER JOURNEY

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A playbook is a series of actions meant to be executed to help a customer achieve a goal or objective in a scalable manner.

ELEMENTS OF A PLAYBOOK

1.

A Defined Success Outcome or Goal

2.

Criteria on who to target, when and why

3.

A list of predetermined steps and activities

4.

Required assets including templates, scripts, decks, etc.

5.

A tracking mechanism

PLAYBOOK CATEGORIES

LIFECYCLE

RISK

GROWTH & ADVOCACY

OBJECTIVE

PLAYBOOK CATEGORIES

LIFECYCLE PLAYBOOKS

Lifecycle Playbooks support the execution of the standard strategic motions over the course of the partnership.

GROWTH AND ADVOCACY

Opportunity and Advocacy Playbooks support the proactive motions to capitalize on the success and health of your customer.

OBJECTIVE PLAYBOOKS

Objective Playbooks support our success framework which will ensure we have properly helped guide our customer through the tasks and activities that will achieve these outcomes.

RISK PLAYBOOKS

Risk Playbooks support the intervention and mitigation of risk behaviors and activities your customers demonstrate.

LIFECYCLE PLAYBOOKS

Budget Planning	CES Survey Follow Up	Churn Customer Interview
Customer Objectives Review (COR) Meeting	Executive Sponsor Engagement	Churn Customer Offboarding
Post-Sales Survey Follow Up	Post-Onboarding Survey Follow Up	New Customer Partnership Kickoff
Account Transition	Marketing Engagement	Renewal Management
New Contact	Customer Onboarding	Post-Onboarding Review
Product Release		

RISK PLAYBOOKS

Budget Constraints	Competitive	Loss of Power User/Champion
Lack of Product Adoption	Loss of Executive Stakeholder	Poor Engagement
Inadequate License Consumption	Passive NPS Score	Non-Intent to Renew
Onboarding > 100 Days	Detractor NPS Score	Merger & Acquisition (M&A)
Technical Support Risk	No Response NPS	Payment Delinquency
Poor Fit Customer	State of Business	Resell Playbook

GROWTH & ADVOCACY PLAYBOOKS

NPS Cross-Sell Opportunity	Case Study
Promoter NPS Score	Speaking Engagement
End User Licence Expansion	Customer Reference

TOP 5 PLAYBOOKS EVERY SAAS COMPANY SHOULD HAVE

PARTNERSHIP KICKOFF

1. Send email to customer following up on AE intro
2. Schedule internal handoff with Sales & Onboarding
3. Schedule the Partnership Kickoff meeting with the customer and the account team
4. Review contract and SFDC notes
5. Prepare kickoff materials - deck
6. Schedule a deck review meeting with account team
7. Host kickoff meeting with customer and account team
8. Follow up with customer - share deck and success plan
9. Schedule onboarding kickoff meeting

ONBOARDING

1. Schedule the onboarding kickoff meeting with the customer and all relevant stakeholders
2. Prepare the customer’s onboarding tracker and share it with them in advance of kickoff
3. Send over documentation to begin the data collection process and CRM integration
4. Host the onboarding kickoff meeting
5. Establish the onboarding cadence and make sure that the customer understands what’s expected for each session
6. Memorialize the discussion and start the process

BUSINESS REVIEW

1. Reach out to business sponsor and schedule EBR
2. Review customer record for usage, NPS, open cases, program/project status, success stories
3. Build EBR deck with emphasis on value, goals & project status using template
4. Circulate presentation internally for review - including management
5. Meet with customer champion to align on message
6. Executive Business Review with customer
7. Log in CRM
8. Send meeting summary and next steps

POOR HEALTH SCORE

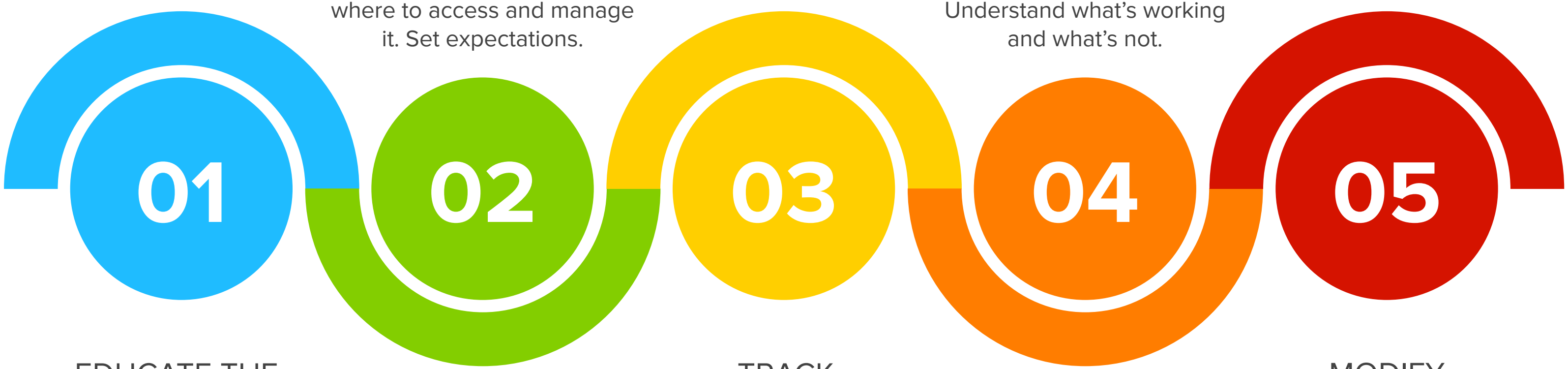
1. Review the data to understand the risk signals and behaviors associated with the score
2. Reach out the to customer to schedule a discussion to better understand the situation
3. Prepare for the discussion - build slides to highlight data and insights and prepare recommendations
4. Design a plan with your customer to get things back on track
5. Send a follow up email with the plan detailed and ask for confirmation
6. Create the plan in your system of record for tracking and managing
7. Monitor improvement over time

RENEWAL

1. Review customer data - product usage, engagement, relationship, program/success
2. Check for and manage auto-renewal
3. Send Auto Renewal email to the customer
4. Meet with customer to discuss the renewal - follow MEDDPICC
5. Review and address any areas of risk - fire risk playbook
6. Prepare renewal paperwork in accordance with customer feedback
7. Contact business sponsor to confirm the renewal and review details and process
8. Send renewal paperwork
9. Upon signed renewal, close the renewal opp and update appropriate systems

DRIVING PLAYBOOK ADOPTION

PLAYBOOK ADOPTION STRATEGY



EDUCATE THE TEAM

Educate your team on the need and value of the playbook. Make sure they understand why this will help them.

ROLL IT OUT

Train the team on how and when to use the playbook. Make sure they understand where to access and manage it. Set expectations.

TRACK ADOPTION

Make sure to have a way to track the usage and adoption of the playbook. Understand where they are getting stuck or skipping steps.

COLLECT FEEDBACK

After the team has been using the playbook for a while solicit feedback from them. Understand what’s working and what’s not.

MODIFY

Playbooks, like most processes should be revisited every so often. Take the feedback from the team and update accordingly.

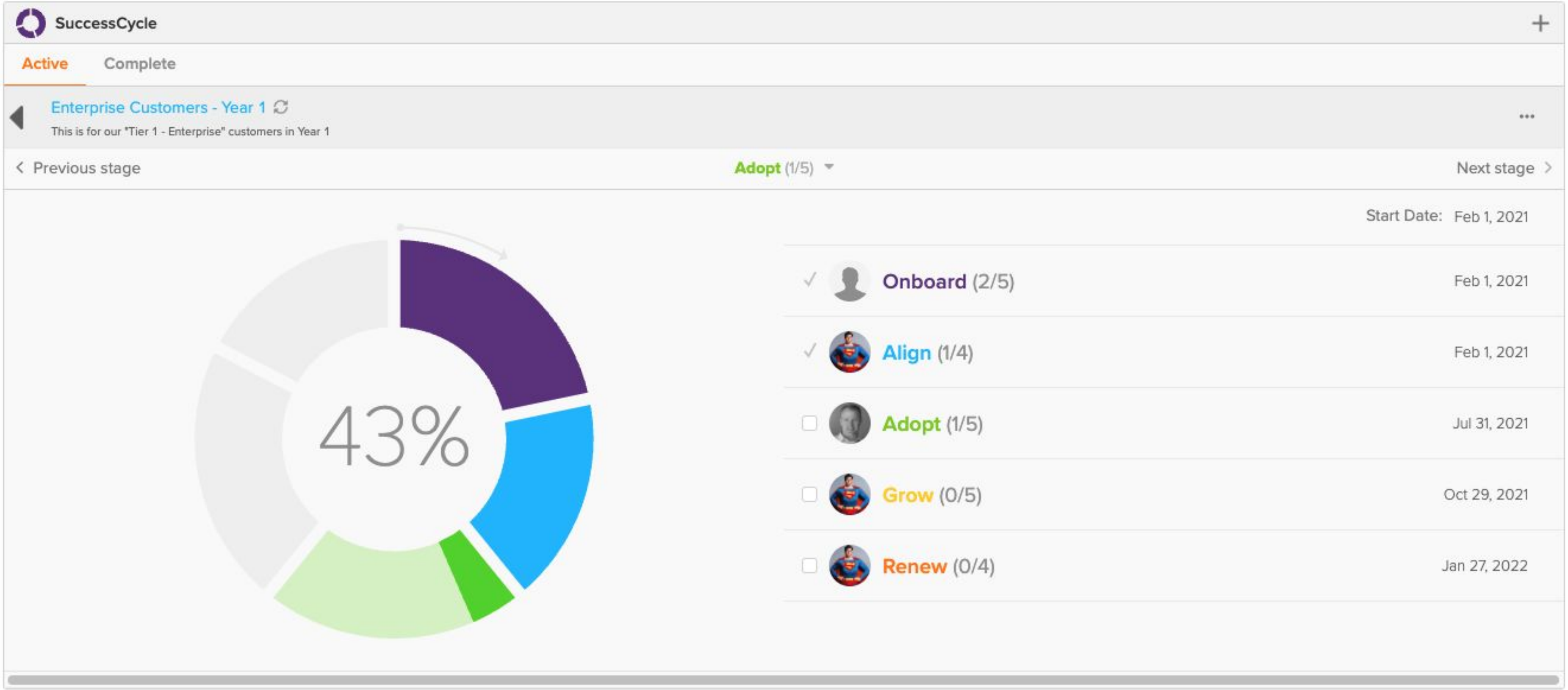
PLAYBOOK OPERATIONS

TECHNOLOGY POWERED PLAYBOOKS

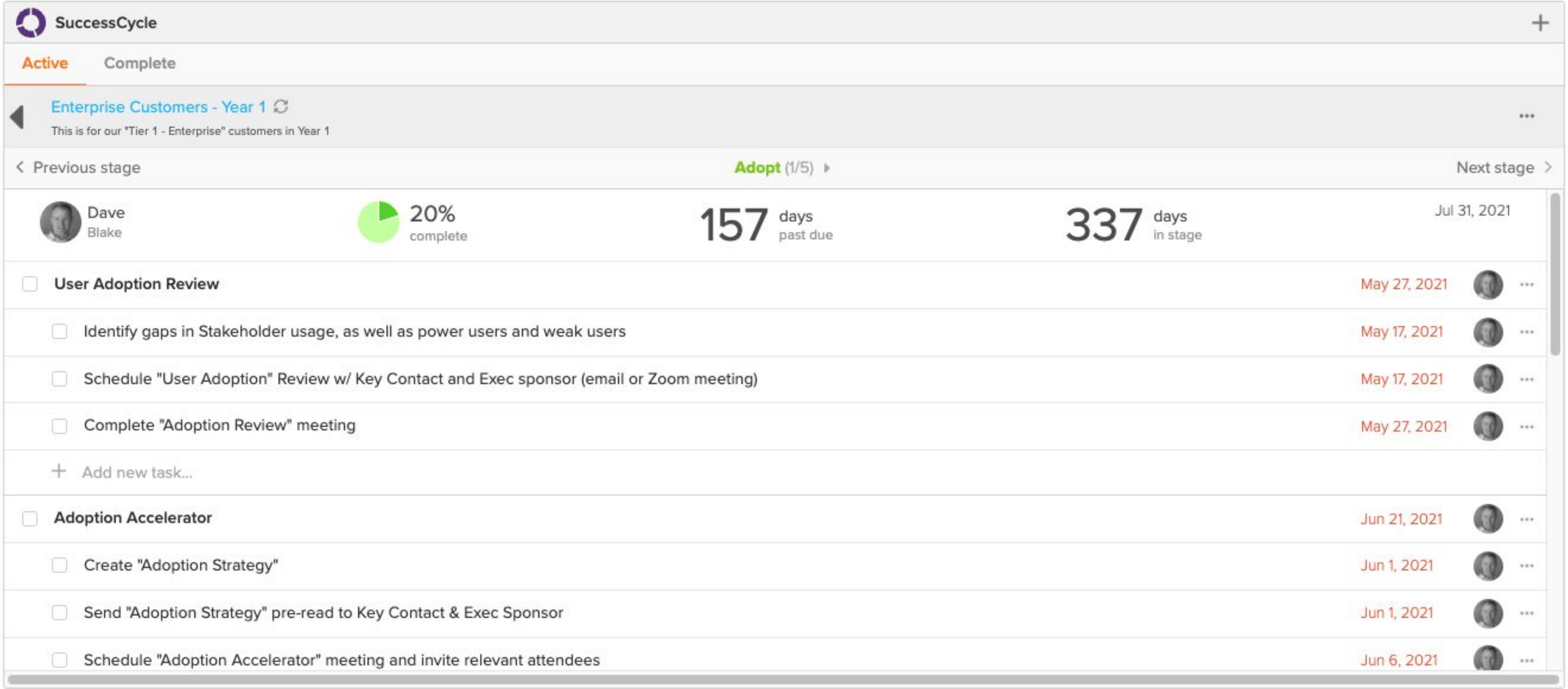
SuccessCycles

- **Pre-Sales** (2)
  - **AE to send the New Customer Survey https://forms.gle/tBWtPZQpgKTkmxHp6** (2)
  - **AE to complete the Sales to CS Handoff form https://docs.google.com/document/d/1kH2VNvYdUnIPkogYyEh4HuChzufOgrB2fw2tyruKo48/edit?usp=sharing** (2)
  - + Add new activity...
- **Post-Sales** (4)
  - **AE to Send Introductory Email https://docs.google.com/document/d/1T9z5LsLIoDIMWyqiBwTACDUjzKSEtLDWnE-4cZKBf7I/edit?usp=sharing** (2)
  - **CSP to Reply to the Introductory Email https://docs.google.com/document/d/1hrHO9mXkSVgdoc1NwOWTjuGz34QzLmsih1RIApg4iTk/edit?usp=sharing** (1)
  - **CSP to Set Up the Partnership Kickoff Call** (2)
  - **AE to CSP Handoff Meeting** (3)
  - + Add new activity...
- **Partnership Kickoff Prep** (1)
  - **CSP to Create the Partnership Kickoff Deck** (3)
  - + Add new activity...
- **Partnership Kickoff Meeting** (1)
  - **CSP Hosts the Partnership Kickoff Meeting with the Customer** (5)
  - + Add new activity...
- **Partnership Kickoff Follow Up** (1)
  - **Send the Memorialized Summary of your Meeting** (5)

TECHNOLOGY POWERED PLAYBOOKS



TECHNOLOGY POWERED PLAYBOOKS

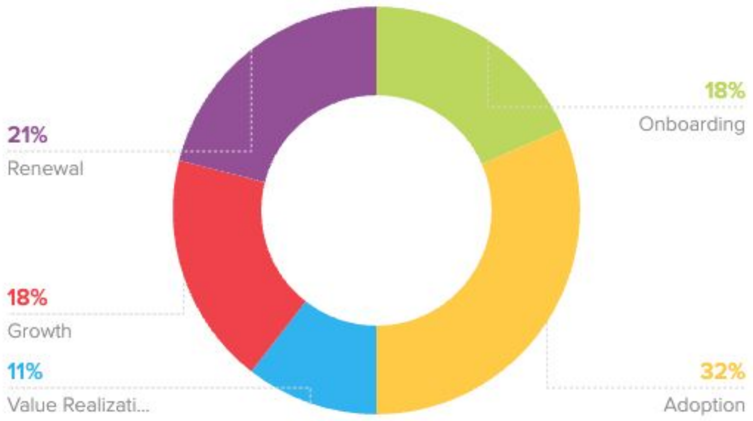


TECHNOLOGY POWERED PLAYBOOKS

SuccessCycle

Strategic - Tier 1 Customers - Year 1

SuccessCycle By Stage



Onboarding
7
Adoption
12
Value Realization
4
Growth
7
Renewal
8

THANK YOU