SAMPLE PLAYBOOK TEMPLATES

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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