5 Elements of a Successful Partnership Kickoff

CLIENTSUCCESS.COM

Learn More ⟶

Kristi Faltorusso
VP of Customer Success
ClientSuccess

#1 Align on the Business

Lead with gratitude and make sure to thank your customer for the partnership. Align on their business - who are they, what do they do, and who do they serve? Review the organization - who are the key players in the partnership, roles & responsibilities, and go broader with the org chart.

Confirm what was shared in the sales cycle and with the Account Executive and set the foundation.

#2 The Current Subscription

Take time to map out the details of what was purchased and what is included in their subscription. Walk through and review the details around any custom work that is required - ensure alignment on SOW.

Map out the business goals associated with what has been purchased, ask their preferred method of communication, and review their tech stack to understand possible integrations.

#3 Partnering Together

Take time to introduce your commitment to the partnership, make account team introductions, outline roles & responsibilities and resources they would have access to during the partnership.

Review the customer journey, survey/VOC program and establish mutual expectations. By the end of the discussion they should understand what to expect every step of the way.

#4 Customer Onboarding

Walk the customer through the details of onboarding and what will occur during the next XYZ days. If there are documents and materials needed in advance, make sure the customer is very clear on this.

Present the project management approach, key milestones and expectations during this stage in the journey. Set up the recurring meetings if possible.

#5 Q&A and Next Steps

Make sure to leave plenty of time for questions about the partnership, onboarding etc. Summarize everything you discussed and recap any action items. Ensure everyone is clear on ownership and timelines, especially if there are things needed prior to the commencement of onboarding.

Close with gratitude and get started!

PARTNERSHIP KICKOFF PLAYBOOK

01 WELCOME EMAIL

AE to send a welcome email to the customer contacts introducing the account team to the customer and high level next steps and timeline to set expectations.

02 CSP EMAIL

CSP (Customer Success Professional) to reply to the AE email within 24 hrs to welcome the customer and to align on next steps. The intention is to set up the partnership kickoff with the customer in the next few days.

03 COMPLETE KNOWLEDGE TRANSFER

AE to complete the Customer Knowledge Transfer document ensuring all of the necessary and appropriate information is being captured for the account team to review. This can live in your CRM or Customer Success Platform to streamline the process.

04 SALES TO CS (ACCOUNT TEAM) HANDOFF

CSP to schedule an internal meeting with the AE and any other key players from the sales process to review the details from the knowledge transfer document/content. Good opportunity to ensure all information is shared to facilitate a strong and efficient kickoff.

05 SCHEDULE THE PARTNERSHIP KICKOFF

Make sure that the meeting is scheduled for the appropriate amount of time to cover your content. Make sure the correct people have been invited and that they have accepted. Lastly, make sure the agenda has been shared and that the customer is aligned.

06 CSP TO BUILD THE DECK

CSP to prepare the deck for the meeting. Ensure that all of the important elements have been added and that everything reflects reality. Use a template if one is available.

PARTNERSHIP KICKOFF PLAYBOOK CONT.

07 SHARE THE DECK

CSP to share the deck with the account team so that everyone is clear on the content and has the ability to lean in with recommendations or edits prior to the meeting.

---

08 PARTNERSHIP KICKOFF MEETING

Today is the big day! Execute the meeting with the customer following the conversation flow outlined in the above guide. Keep track of time - Start on time and end on time. Leave time for questions.

---

09 MEMORIALIZE THE DISCUSSION

Following the discussion, prepare a follow up email for your customer. Include a summary of the conversation as well as all next steps that were discussed. Attached the deck (PDF) and the recording if one is available.

---

10 SCHEDULE YOUR NEXT MEETING

Make sure to always get your next meeting in the books. For many organizations the next meeting will be the official start of the formal onboarding process. Lock in the meeting, provide the agenda and be sure to share any materials in advance if necessary.