Thank you for joining us today, we’ll be starting shortly!

clientsuccess

REDUCE CHURN. INCREASE EXPANSION.
MAXIMIZE REVENUE.

CUSTOMER SUCCESS LEADERSHIP BOOTCAMP
5 PART WEBINAR SERIES

8/3 Part I: How to Design Your Customer Journey

8/10 Part II: Moving to a Partnership Kickoff Framework

8/17 Part III: Anatomy of a High Performing Health Score

8/24 Part IV: Creating a Renewal Process and Revenue Forecast Model That Work

8/31 Part V: Architecting Your CS Interview Process

JOIN US EVERY TUESDAY IN AUGUST
1PM EST/ 10AM PST

KRISTI FALTORUSSO
VP of Customer Success
ClientSuccess

brought to you by

clientsuccess

clientsuccess
Recreational Equipment, Inc.
SuccessCycle
51%
Onboard (6/6)
Deploy (4/5)
Adopt (1/12)
Grow (0/9)
Renew (0/4)
Engagement
Leader
WINTER
2021
Leader
SPRING
2021
Leader
SUMMER
2020
Leader
FALL
2020
Leader
WINTER
2020
Leader
SPRING
2020
clientsuccess

CUSTOMER SUCCESS LEADERSHIP BOOTCAMP

PART II: MOVING TO A PARTNERSHIP KICKOFF FRAMEWORK

TUESDAY, AUGUST 10, 2021
1PM EST/ 10AM PST

KRISTI FALTORUSSO
VP of Customer Success
ClientSuccess

brought to you by

clientsuccess

COMMON POST SALE EXPERIENCE

01

CONTRACT SIGNED

Congratulations! You have a new customer, time to get started!

02

CSM INTRODUCTION

Hello, Mr. Customer, I am your new CSM, let's get started!

03

ONBOARDING KICKOFF

Tactical and technical discussion focused on platform configuration and training.

OPTIMIZED POST SALE EXPERIENCE

CONTRACT SIGNED

Congratulations, you have a new customer! Time to get started!

ACCOUNT TEAM INTRODUCTION

Mr. Customer, meet your account team. These are the people who are going to help ensure your success.

PARTNERSHIP KICKOFF

Let’s embark on this journey. Tell me about your goals and expectations!

ONBOARDING COMMENCEMENT

Let’s discuss how to set up the platform in accordance with your goals.

WHAT IS A PARTNERSHIP KICKOFF?

A formal executive level discussion with your new customer to align on the partnership goals and expectations.

PARTNERSHIP VS. ONBOARDING KICKOFFS

PARTNERSHIP KICKOFF	ONBOARDING KICKOFF
Appropriate discussion for an Executive Stakeholder to participate in	Technical discussion with minimal Executive support
Focus on establishing goals and setting benchmark KPIs	In the weeds discussions focused on tactical tasks and activities
Establish partnership expectations	Meetings structured around assumptions
Review the Customer Journey and Feedback Loop	Short term visibility around onboarding and next steps
Align on the Onboarding program and next steps	One-size-fits-all approach to onboarding and enablement

WHERE DOES IT FIT IN

CSM Introduction

Sales team introduces the CSP and Account team to the customer.

Internal Knowledge Transfer

Pre-Sales Team & Account Team meet to review the customer in detail.

Partnership Kickoff Meeting

Executive kickoff meeting with the customer to align on the partnership.

Memorialized Follow Up

CSP takes lead on memorializing the discussion and sends follow up and materials to the customer.

Onboarding Commencement

Start Onboarding with the customer - Platform configuration, data ingestion, application set up, training and enablement

PARTNERSHIP KICKOFF AT CLIENTSUCCESS

PARTNERSHIP KICKOFF AGENDA

1.

ALIGN ON YOUR BUSINESS

Overview of your business & customers and expectations for the partnership.

2.

PARTNERSHIP INTRODUCTION

Account team review, Customer Journey, engagement and resources.

3.

GOAL SETTING

Establish goals and objectives for the partnership; identify KPIs.

4.

ONBOARDING REVIEW

Review Onboarding, requirements and getting started.

5.

NEXT STEPS

Establish onboarding kickoff date, and ongoing cadence.

1. ALIGNING ON YOUR BUSINESS

YOUR BUSINESS

WHO YOU ARE

Describe the company - Find insights and information on their website, G2 and other online resources to ensure alignment.

WHO YOU SERVE

Who are their customers? What industries do they support? Size of customers they target - Enterprise or SMB; Examples of marquee brands.

WHAT YOU DO

Talk about what they do - What problems they solve for their customers. Discuss the use cases and other details.

PARTNERSHIP EXPECTATIONS

ENGAGEMENT

What does your ideal engagement model look like for the partnership?

COMMUNICATION

What is your preferred method of communication? Email? Phone? Text? Chat? Video?

SUCCESS

What does success look like for the partnership?

[CUSTOMER NAME] KEY STAKEHOLDERS

EXECUTIVE SPONSOR

[NAME]

[TITLE]

DAY-TO-DAY LEAD

[NAME]

[TITLE]

TECHNICAL RESOURCE

[NAME]

[TITLE]

OPERATIONS

[NAME]

[TITLE]

BILLING

[NAME]

[TITLE]

2. PARTNERSHIP INTRODUCTION

YOUR DESIGNATED ACCOUNT TEAM

[NAME]
[Title]
CUSTOMER SUCCESS

Serving as your primary point of contact and day-to-day lead in the partnership; your strategic platform advisor.

[NAME]
[TITLE]
SUPPORT

Technical support resource available to answer technical platform related questions.

[NAME]
[TITLE]
CUSTOMER SUCCESS

Executive resource committed to the overall success of the partnership.

[NAME]
[TITLE]
SERVICES

Consulting resource available as a premium service for project based work and platform configuration.

support@clientsuccess.com

help.clientsuccess.com

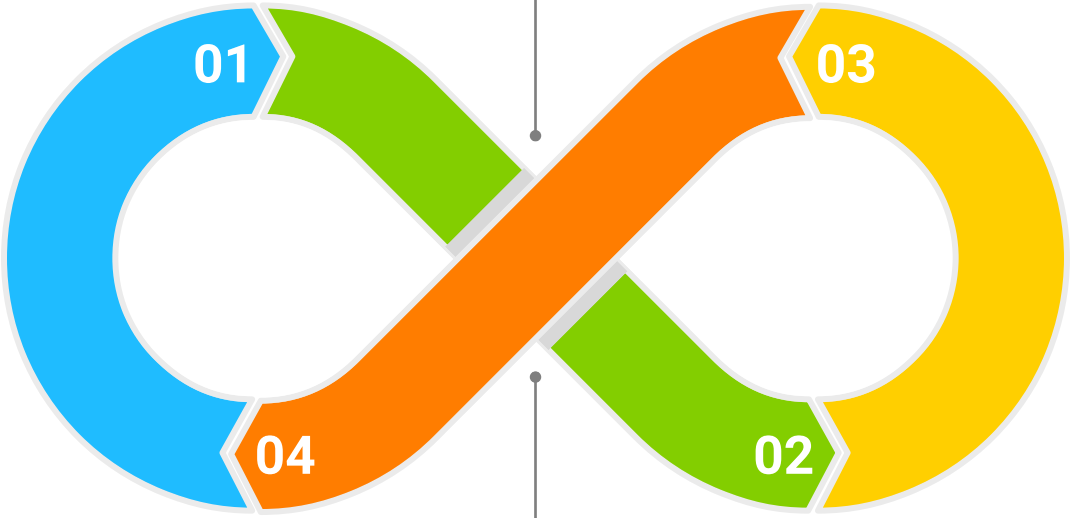
CUSTOMER JOURNEY

2. EXECUTE

Customer and User onboarding and training. Assist with strategy and configuration to align with core use cases. Establish an initial win.

1. ALIGN

Confirm success criteria and align on measurement of KPIs. Set proper expectations for the partnership and establish clear roles and responsibilities.



3. REALIZE

Customer has adopted ClientSuccess into their workflow. Product usage is in line with their business objectives and they are working towards their goals.

4. ADVOCATE

Customer has expressed their intention to renew and/or grow and has agreed to serve as an advocate for ClientSuccess.

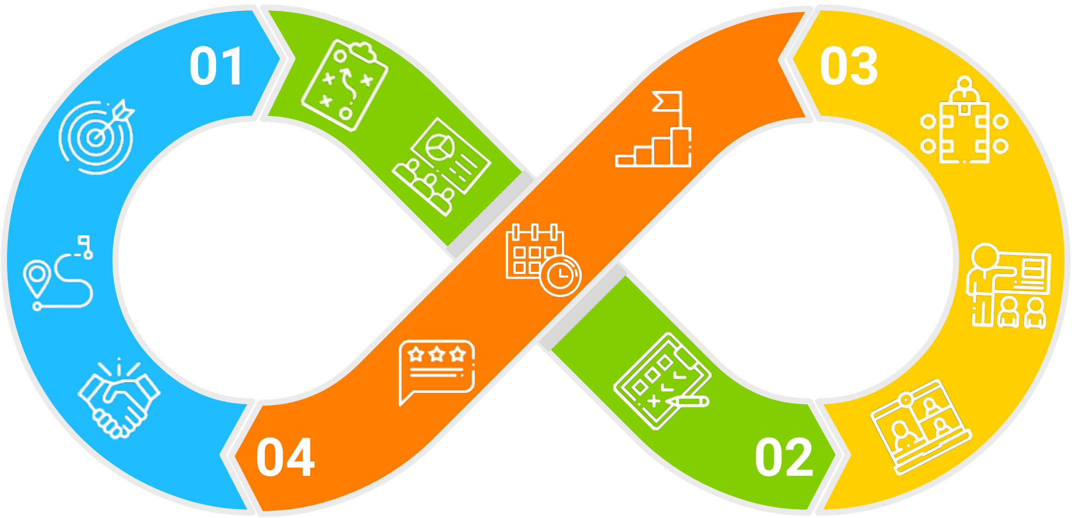
CUSTOMER JOURNEY

1. ALIGN

Welcome email
Complete prep documents
Partnership kickoff meeting
Goal and Expectation setting
Onboarding Preparation

2. EXECUTE

Onboarding kickoff
Platform configuration
Training and Enablement
End User Training
Post-Onboarding Review



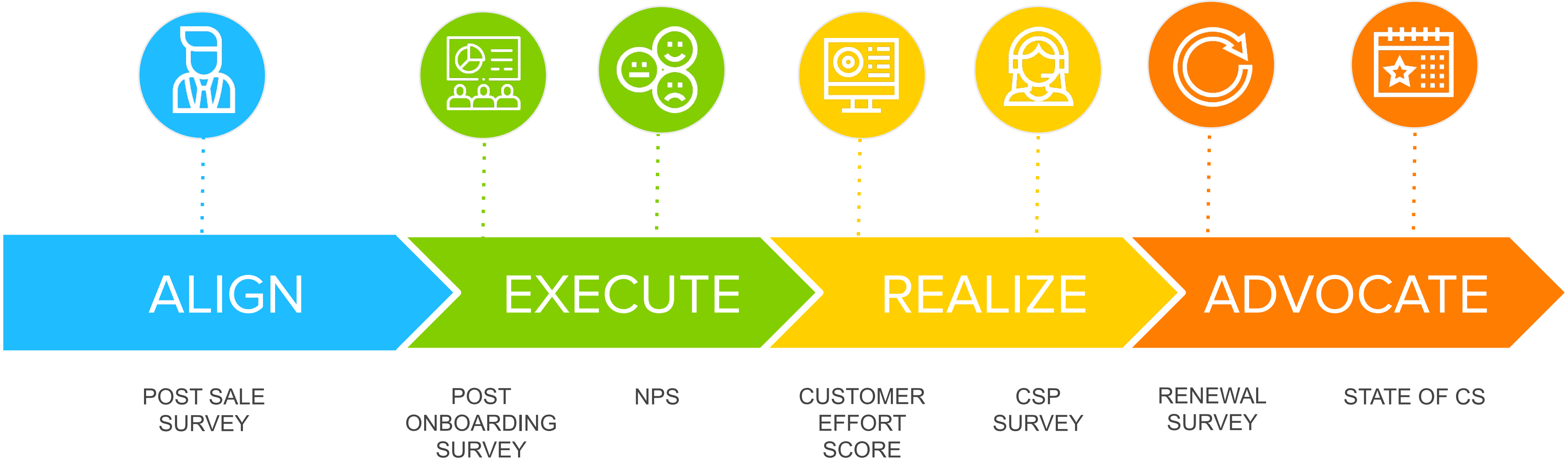
4. ADVOCATE

Case Study
Customer Advocacy Engagement - Referral & Reference
Customer Reviews
Renewal and Growth Plan

3. REALIZE

Recurring strategy sessions
Program management
Best practice recommendations
Customer Objective Review (COR)
Success Stories

CUSTOMER JOURNEY FEEDBACK



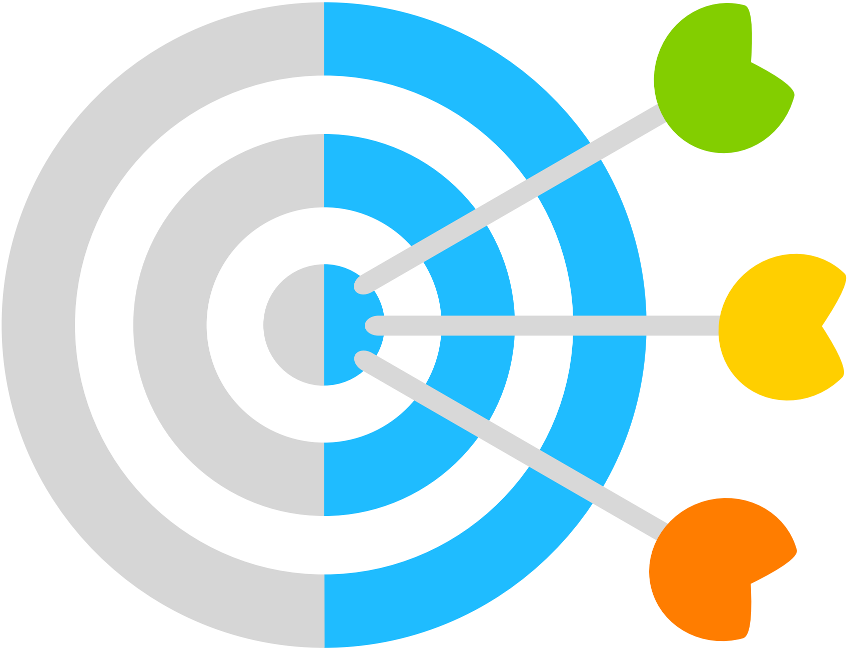
3. GOAL SETTING

BUSINESS OBJECTIVES FOR CLIENTSUCCESS

Which of these best aligns with your business needs and supports the partnership with ClientSuccess?

- DEMOCRATIZE DATA
- OPERATIONALIZE PROCESS
- DRIVE EFFICIENCY
- MITIGATE RISK
- IDENTIFY GROWTH
- INCREASE VISIBILITY
- SCALE WITH EASE

YOUR TOP 3 PARTNERSHIP GOALS



GOAL 1

Please define your core KPIs for tracking the success of this goal.

GOAL 2

Please define your core KPIs for tracking the success of this goal.

GOAL 3

Please define your core KPIs for tracking the success of this goal.

4. ONBOARDING REVIEW

ONBOARDING WITH CLIENTSUCCESS

KICKOFF

Partnership kickoff meeting facilitates introductions, allows us to align on expectations and goals and starts the onboarding process.

CONFIGURATION

Add users to your platform instance, set up profiles and passwords and connect your email integration.

DATA INGESTION

Review your CRM data, set up filters, map custom fields and import customer and contact data into ClientSuccess.

TRAINING

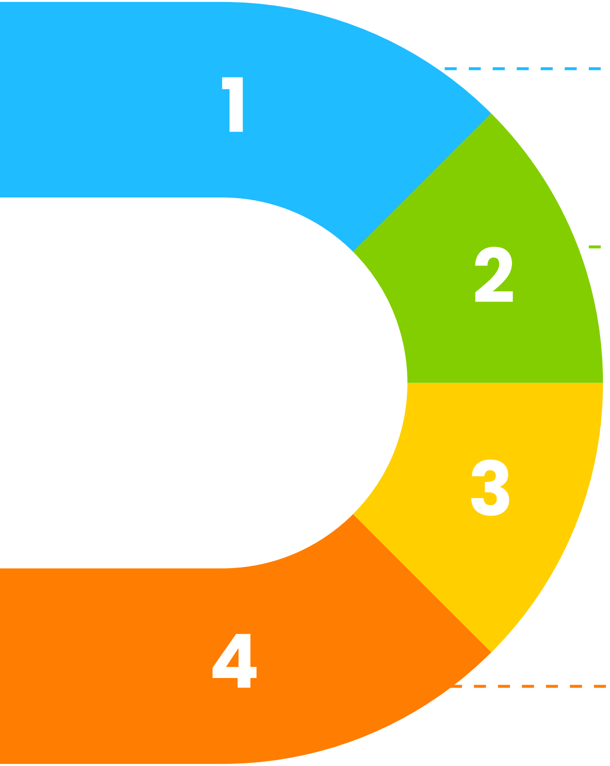
A series of hands on training and enablement sessions aligned to your CS framework supporting your core use cases and business goals.

WRAP-UP

Conclude onboarding with an Executive alignment meeting to review your deployment, reconfirm goals and align on next steps.

YOUR FIRST 90 DAYS WITH CLIENTSUCCESS

GETTING STARTED



ONBOARDING SURVEY

Share more with us about your business and your customer success organization/ This insight will help guide un in our implementation.

LIST OF END USERS

Let us know who will be using the ClientSuccess platform so we can get them provisioned as soon as possible.

YOUR CUSTOMER SUCCESS JOURNEY

Have you already designed your Customer Journey framework? If so, share that with us so we can reference this while building out your program.

HEALTH SCORE FRAMEWORK

What criteria do you use to determine customer health? If you have a few data points already in mind, please let us know so we can help you build this out.

TRACKING YOUR ONBOARDING

Tailored Onboarding tracker for collaboration and alignment throughout the onboarding process.

Easy, in-line access to training and enablement documentation.

Clear management of tasks and activities to ensure on-time progress and accountability.


clientsuccess and [insert client logo over cell]

ENABLEMENT START DATE: ________

Project status: On track

ENABLEMENT GOAL DATE: ________

Account Set-up	Instructional Documents	Owner	Due Date	Status	Stage	Notes
Add Team Members as Users	Adding and Managing Team Members	Admin		Incomplete	Getting Started	
Set password		All team members		Incomplete	Action Item	
Add profile picture		All team members		Incomplete	Action Item	
Connect email integration	Email integration with ClientSuccess	All team members		Incomplete	Action Item	

Topic #1 - Data Ingestion Prep	Instructional Documents	Owner	Status	Stage	Notes
Review Data Ingestion Plan for Client and Contact Data	Salesforce Integration Center		Incomplete	Planning	
Authenticate SFDC and CS integration	Salesforce Authentication to ClientSuccess		Incomplete	Action Item	
Decide on import filters to ingest Clients/Contacts	Salesforce Import Filter		Incomplete	Action Item	

5. NEXT STEPS

NEXT STEPS

- **SCHEDULE YOUR ONBOARDING KICKOFF**
  Get your initial onboarding kickoff meeting scheduled as well as lock down the recurring cadence.

- **COMPLETE THE SURVEY AND SHARE ASSETS**
  Complete your new customer survey and be sure to share all of your assets with your CSP.

- **REVIEW THE ONBOARDING TRACKER**
  Once your CSP shares your onboarding tracker, review the steps and stages and familiarize yourself with it.

- **PREPARE DATA FOR INGESTION**
  Review all data sets that will be ingested into ClientSuccess; Assess accuracy and currency.

Q & A