CUSTOMER SUCCESS LEADERSHIP BOOTCAMP

How to Execute a Customer Objectives Review (COR) Meeting that Executives Will Want to Attend

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1PM EST/ 10AM PST

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ClientSuccess

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WHAT IS A CUSTOMER OBJECTIVES REVIEW (COR) MEETING?

WHAT'S WRONG WITH HAVING A QUARTERLY BUSINESS REVIEW (QBR) OR EXECUTIVE BUSINESS REVIEW (EBR)?

SETTING THE STAGE FOR THE COR

GET BUY-IN EARLY

Introduce the COR meeting early in the partnership. Make everyone aware of the intention, timing and value of this discussion. Seek alignment and support for future discussions.

SET EXPECTATIONS

When the time comes for your COR meeting, make sure to set the right expectations for the meeting - be clear in establishing the agenda AND the objective.

THE RIGHT PEOPLE

Ensure the right individuals are available to participate and that each person is clear on the value they will receive from the meeting. Participation at all levels is key to COR success.

BE COGNIZANT

Make sure to think about the audience and what they will expect to, need to and want to see. Watch the clock and make sure you have a clear understanding of participation and timing.

EXECUTION

Execute flawlessly. The best COR meetings we've seen, we don't get through the whole deck, the customer talks more than the CS team and everyone feels good about moving forward.

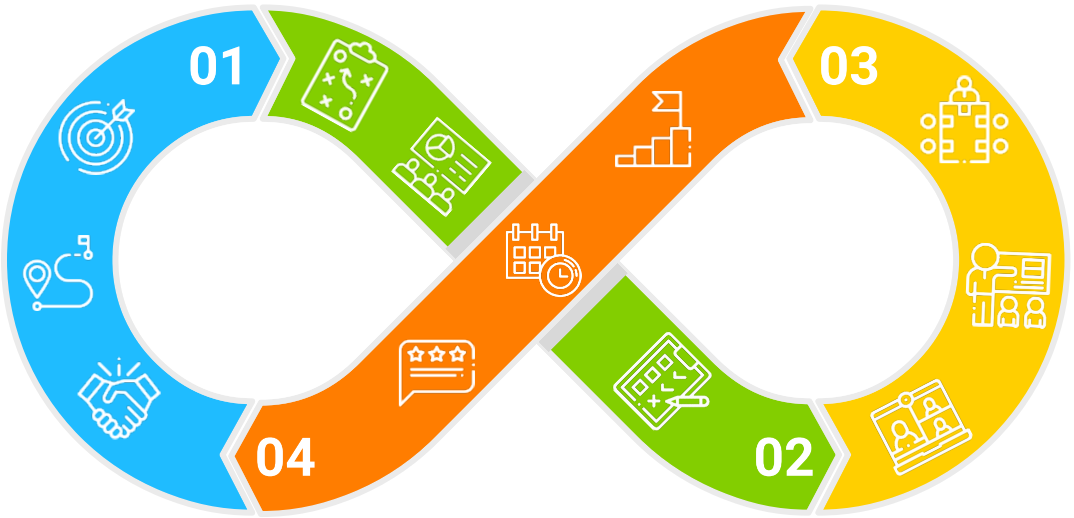
CUSTOMER JOURNEY

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



3. REALIZE

Recurring strategy sessions
Program management
Best practice recommendations

Customer Objective Review (COR)

Success Stories

4. ADVOCATE

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

THE MAKINGS OF AN EFFECTIVE COR MEETING

COR PREP

- Start planning at least 4 weeks in advance - schedules are hard to nail down
- Make sure to have joint alignment on the agenda and objective of the meeting
- Do your homework
- Allow your main POC to review the data in the presentation with you in advance - it's more effective when you co-present it
- Confirm attendance, participants and time allocation 48 hours in advance
- Have someone proof your deck

COR EXECUTION

- Arrive 5-10 minutes prior to the start to ensure audio and video work properly
- Be the first on to welcome guests and build some rapport - don't just ask about the weather
- Before starting, make sure to confirm that everyone has the appropriate time allocated and ask about hard stops
- Make this a discussion, draw the attendees into the conversation, don't talk at them
- Watch the clock

COR FOLLOW UP

- Send a follow up within 24 hours of the meeting - the sooner the better
- Include a summary of the discussion, clear next steps with owners and timelines, a PDF version of the deck and a recording (if you have)
- Make sure to manage the execution of the next steps - don't let these fizzle
- Ask the team for feedback - modify accordingly for next time
- Ask when they would like to meet again - then lock it down

SAMPLE COR MEETING DECK

REPLACE WITH CUSTOMER LOGO

[CUSTOMER NAME] + ClientSuccess
Customer Objectives Review Meeting
May 2021

clientsuccess

REDUCE CHURN. INCREASE EXPANSION.
MAXIMIZE REVENUE.

COR MEETING AGENDA

1.

COMPANY AND BUSINESS UPDATE

Review the state of your business and overall performance. Align on priorities.

2.

GOALS AND PERFORMANCE UPDATE

Discuss your partnership goals and progress to date.

3.

PARTNERSHIP ENGAGEMENT

Recap of the work we have done together and platform adoption.

4.

IDEAS & RECS

Recommendations on how to optimize your instance for optimal performance.

5.

SENTIMENT AND NEXT STEPS

Align on current sentiment and next steps for the partnership.

1.COMPANY AND BUSINESS UPDATE

WHAT WE'VE HEARD

Clora Acquires Legit.ai to Accelerate Talent Acquisition Across the Life Sciences Industry

- Clora is building the future of work in the life sciences. By combining the two companies, Clora will continue to expand its global talent operations within the life sciences by creating the industry's leading marketplace of industry professionals.
- The venture-backed Legit team built a proprietary Natural Language Processing engine to identify the right expert for a task by mining 40 million scientific publications, patents, and clinical trials as well as 2.1 million expert profiles.
- The acquisition further positions Clora as a global leader in the life science talent market.

Two leading marketplaces have partnered to help life science researchers fill talent gaps and accelerate R&D pipelines

San Diego, CA and Boston, MA - October 20th, 2020 - Scientist.com, the healthcare industry's leading marketplace for life science research, today announced a strategic partnership with Clora, the best place to discover, build and manage on-demand life science teams. Marketplace users now have access to over 6,000 registered life science experts within Clora's global network that spans all areas of therapeutic discovery and development.

COMPANY UPDATE

INSERT COMPANY LOGO IN PLACE OF THIS YELLOW BOX

2.GOALS AND PERFORMANCE UPDATE

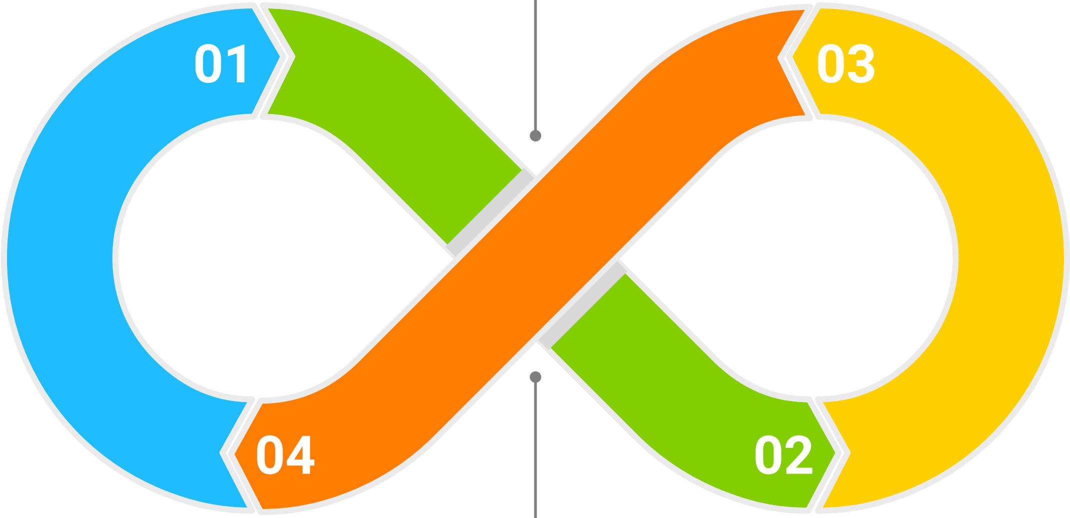
CUSTOMER JOURNEY STAGES

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

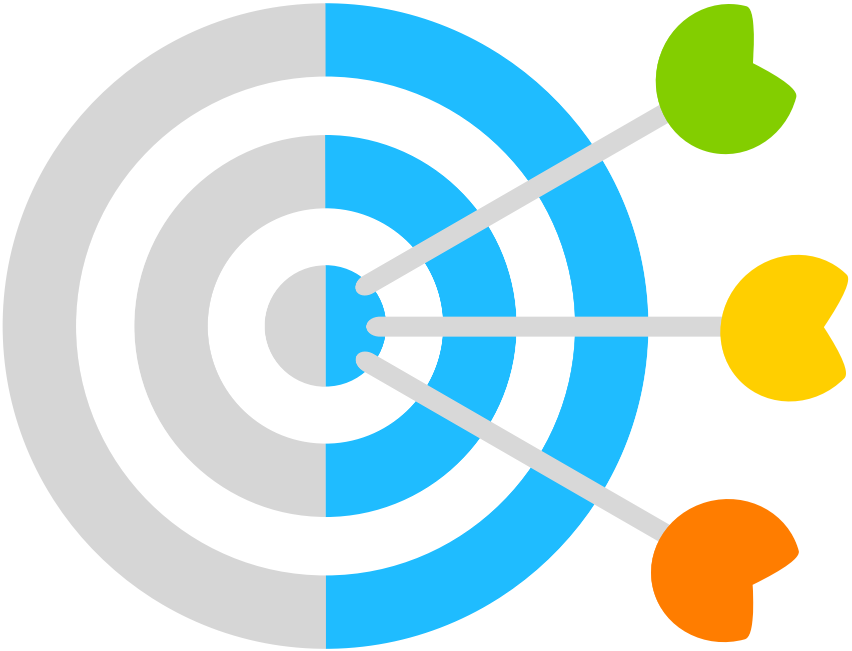
Customer has expressed their intention to renew and/or grow and has agreed to serve as an advocate for ClientSuccess.

BUSINESS OBJECTIVES FOR CLIENTSUCCESS

What challenges did you partner with ClientSuccess to solve?

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.

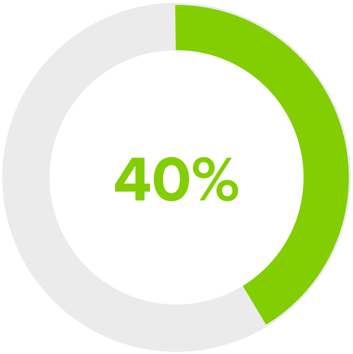
GOAL 2

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

GOAL 3

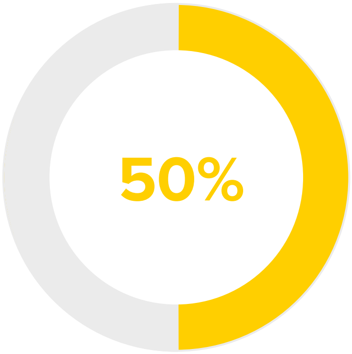
Please define your core KPIs for tracking the success of this goal.

PROGRESS TO DATE



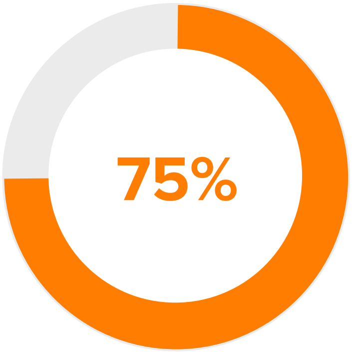
GOAL 1

Please provide some context as to the progress we’ve made and what we need to do next - keep it high level.



GOAL 2

Please provide some context as to the progress we’ve made and what we need to do next - keep it high level.



GOAL 3

Please provide some context as to the progress we’ve made and what we need to do next - keep it high level.

3.PARTNERSHIP ENGAGEMENT

PROGRESS TO DATE

COMPLETED

- Make a list of the work that has been done
- List of projects
- Tasks
- Activities
- Key Milestones

IN PROGRESS

- Make a list of the work that has been done
- List of projects
- Tasks
- Activities
- Key Milestones

NOT STARTED

- Make a list of the work that has been done
- List of projects
- Tasks
- Activities
- Key Milestones

DEFERRED

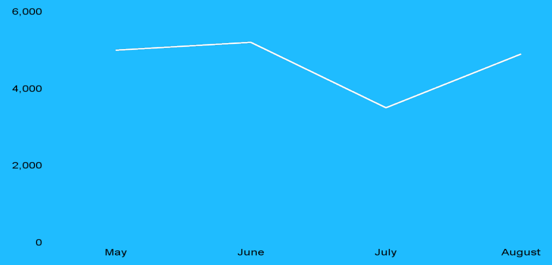
- Make a list of the work that has been done
- List of projects
- Tasks
- Activities
- Key Milestones

AT RISK

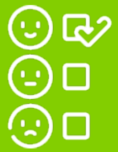
- Make a list of the work that has been done
- List of projects
- Tasks
- Activities
- Key Milestones

CLIENTSUCCESS USAGE AT [CUSTOMER NAME]

DAILY PAGEVIEWS



NPS



83

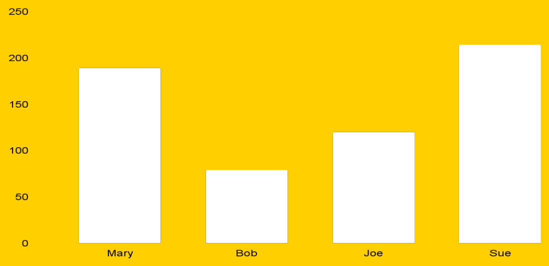
USERS

12 OF 15

INTEGRATIONS

3

ACTIVE USERS



MODULE USAGE

CUSTOMERS

2,321

[CUSTOMER NAME] ADOPTION SCORECARD

SCORECARD ELEMENT	DEPLOYED	SCORE
SuccessCycle Live	YES	100%
Usage Data Ingested and Live	YES	100%
Support App Enabled	YES	100%
Email Integration Configured	YES	100%
Pulse Reason Codes Configured	YES	100%
Custom Fields Configured and Populated	NO	0%
Subscriptions Data Live	NO	0%
Scorecard Configured and Enabled	YES	100%
CRM Actively Syncing Data and/or Client/Contact Data Imported	YES	100%
SuccessScore Profile Live	YES	100%
Automation Rule Live	NO	0%
NPS Survey Sent	NO	0%
TOTAL SCORE		**67%**

4.IDEAS AND RECOMMENDATIONS

SuccessCycles

Increase the number of SuccessCycles deployed to support your customer journey

What are SuccessCycles and the benefit?

SuccessCycles are prescriptively designed playbooks that help deliver a consistent customer experience by defining, managing, and measuring your methodology for driving success. SuccessCycles help ensure that all the members of your team are executing the right tasks and activities at the right time to advance the customer lifecycle, mitigate risk, capitalize on opportunity and support advocacy all while saving time and driving efficiency.

What does your deployment look like?

[Customer Name] currently has 2 SuccessCycles active in ClientSuccess - Onboarding and Renewal.

What do we recommend?

Most customers design SuccessCycles which fall into 4 buckets - LifeCycle, Risk, Opportunity and Advocacy and identify and build “playbooks” to support them. You might want to create SuccessCycles for CS to Sales Handoff, Business Review, Lack of Engagement, Low Adoption etc.

Think about the various repeatable activities your team is responsible for and map them out using SuccessCycles.

NPS

Collect customer sentiment by leveraging our native NPS technology.

What is NPS and the benefit?

Native NPS application enables you to get feedback from your entire customer base in real time. Use this information to determine customer health, renewal forecast accuracy, and validate product roadmap decisions.

What does your deployment look like?

[Customer Name] is not currently using any survey tool to capture this critical customer feedback.

What do we recommend?

We recommend you leveraging our native NPS solution to develop and deploy your NPS strategy. Based on your intended playbooks for managing customer follow-up, we can assist in designing the appropriate SuccessCycle to ensure your customers are 1) Reviewing the data coming in an mapping this into their account management strategy 2) Closing the loop with customers in a timely manner 3) Using this data to help influence your customer health score and forecast risk.

Most customers who have deployed NPS with ClientSuccess have created a quarterly or semi-annual NPS strategy to ensure data is being captured and managed correctly.

5.SENTIMENT AND NEXT STEPS

PARTNERSHIP SENTIMENT

WHAT IS YOUR OVERARCHING SENTIMENT ON THE PARTNERSHIP TO DATE?

IF YOUR RENEWAL WAS TODAY, WOULD YOU RENEW?

HOW CAN WE BE BETTER PARTNERS TO YOU?

WHAT FEEDBACK WOULD YOU LIKE TO SHARE WITH US TODAY?

PARTNERSHIP NEXT STEPS

Follow up on Recommendations

- Complete the 30 point inspection
- Identify additional areas to optimize the use of the platform

Complete the SFDC data ingestion

- Set up a meeting with Consulting to review the current configuration and devise next steps
- Consolidate the open Support tickets on this

Send over best practices on Journey Maps

- Send over best practices on how other companies are setting up their journey map
- Schedule a call with Kristi and their leadership team to discuss strategies

KEY TAKEAWAYS

1.

Introduce the concept of this meeting early in the partnership and set proper expectations around timing and participation.

2.

Allow yourself enough to plan and execute the meeting. It's not just about "building a deck" it's about preparing for an engaging discussion.

3.

Focus on the discussion and the value for your customers; don't worry about getting through the presentation.

4.

Ask for feedback! This, like most programs you will deploy, should be an evolution. Your customers will force you to be better, let them tell you how.

5.

Not all customers will want to engage with you this way, and THAT'S OK! Don't force customers to be a part of a conversation that will not serve them well.

Q & A