CUSTOMER SUCCESS LEADERSHIP BOOTCAMP

# Executing Account Transitions that Excite Customers and Reduce Risk

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ClientSuccess

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# WHEN MIGHT YOU HAVE TO TRANSITION A CUSTOMER FROM ONE CSP TO ANOTHER?

# NEED FOR CHANGE

# WE NEED TO MAKE A CHANGE, NOW WHAT?

# MANAGING THE TRANSITION PROCESS

## HAVE A PLAN

Establish a plan to manage the internal communication, customer communication and project management to ensure everything happens correctly.

## MANAGE INTERNAL COMMS

Make sure that everyone in the company is aware of the change; you may not need to broadcast the changes but minimally ensure that if anyone needs to know who is managing the customer, they can find that.

## TRACK YOUR ACTIVITY

Have a way to track all of the tasks and activities - internal and with customers. You cannot manage what you can't measure.

## MANAGE CUSTOMER COMMUNICATION

Communication is key here. You need to make to manage communication with customers and set proper expectations.

## EXECUTE WITH EASE

You have your plan, and now it's time to execute flawlessly. Make sure everyone knows what to do, when and with whom.

# DESIGNING YOUR TRANSITION PLAN

### WHO IS THE NEW OWNER?

Each customer should have an "owner", make sure this is identified before getting started.

### WHO IS MANAGING THE COMMS?

Determine who will be managing communications to your customers and what that message will be.

### WHAT DO WE NEED TO KNOW?

Before you can effectively transition any customer, you need to get up to speed. AS the new CSP, take the time to get caught up on all the details.

### WHAT'S NEXT?

You need to manage this transition with the customer effectively. This will include an alignment meeting with the customer to continue to move forward.

# INTERNAL COMMUNICATION MANAGEMENT

## CUSTOMER SUCCESS ORG

Customer Success, Technical Support, Onboarding, Professional Services etc.should all have visibility into all account team changes.

## LEADERSHIP

All of your leaders should be aware that changes are taking place. As they connect with customers they will want to know who is leading the partnership.

## SALES

Your sales counter parts need to know who will be managing the customers they brought onboard.

## MARKETING

Your marketing team needs to know who to go to when they are looking for speakers, references, case studies etc.

## PRODUCT

Your product team should know who to partner with on roadmap discussions, product ideas, bugs etc.

# TRACKING THE TRANSITION

| Client | SuccessScore | ARR | Renewal (days | Pulse | Last Engaged ( | Last Touch (UT | Assigned CSM | NEW CSP | Exec Sponsor | Email Sent |
|---|---|---|---|---|---|---|---|---|---|---|
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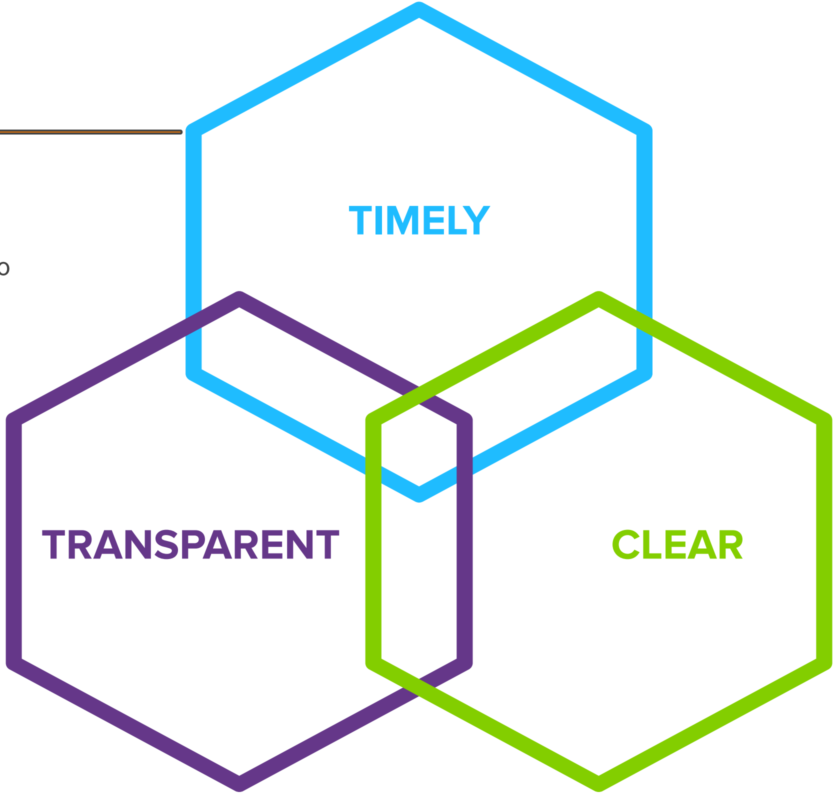
Design an easy to use template that will ensure that everyone had visibility into the initial steps in managing the transition. The tracker becomes your quick view to see who was the owner and who is the new owner along with a few tasks and activities.

# COMMUNICATION IS EVERYTHING

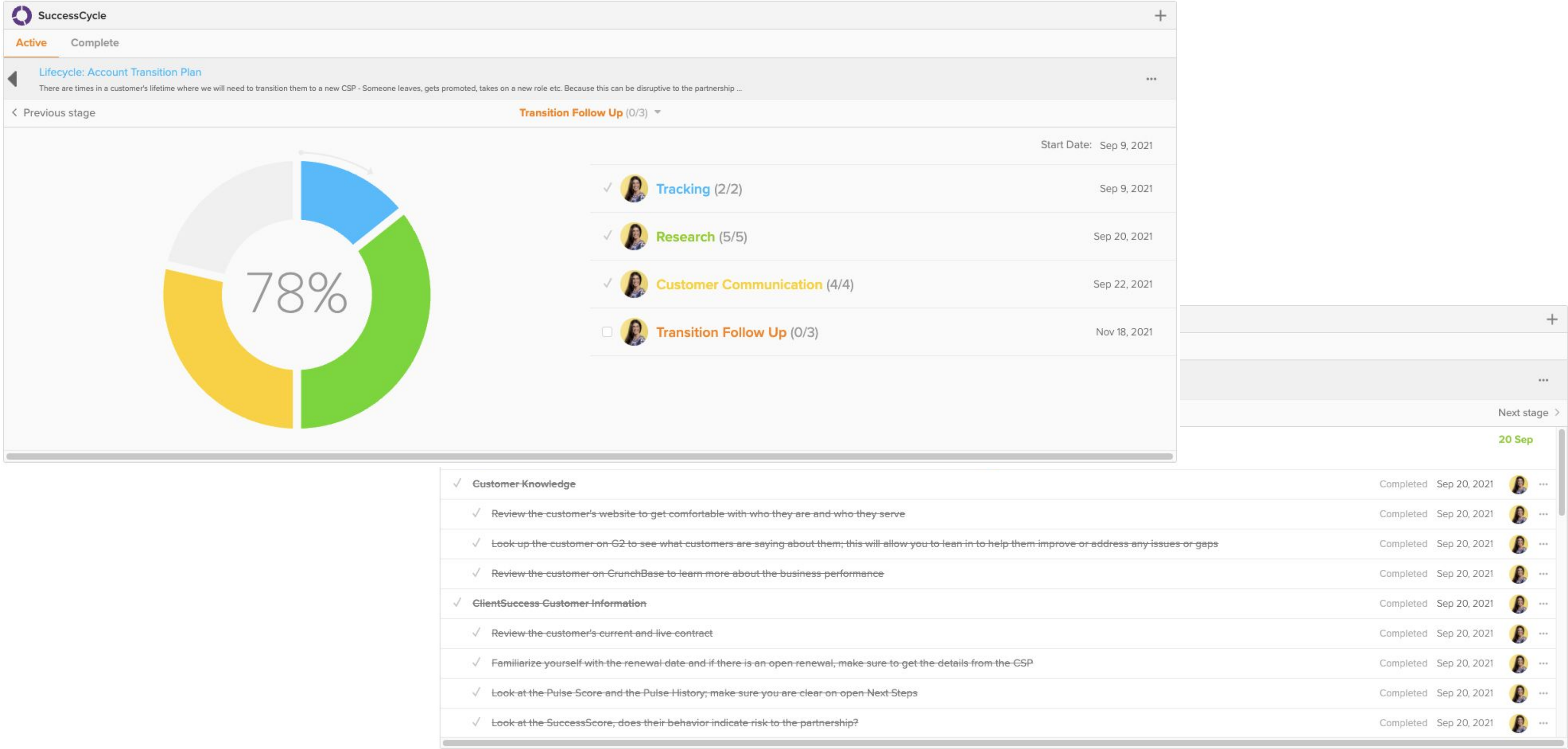



Make sure you are communicating change to your customers first.

Be honest about what is happening, good, bad or otherwise.

Make sure your communication is effective is setting clear expectations and next steps.

# EXECUTE WITH EASE



# SAMPLE CUSTOMER ALIGNMENT MEETING

Thank you, we appreciate your partnership.

# MEETING AGENDA

## 1.

### ALIGNING ON YOUR BUSINESS

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

## 2.

### TEAM INTRODUCTION

Account team review, Customer Journey, engagement and resources.

## 3.

### CONFIRMING YOUR GOALS

Confirm or establish goals and objectives for the partnership; identify KPIs.

## 4.

### PARTNERSHIP REVIEW

Review of the current ClientSuccess deployment with recommendations; Partnership Overview.

## 5.

### NEXT STEPS

Establish recurring meeting cadence and partnership next steps.

# 1. ALIGNING ON YOUR BUSINESS

# [CUSTOMER NAME] KEY STAKEHOLDERS

EXECUTIVE SPONSOR

[NAME]

[TITLE]

DAY-TO-DAY LEAD

[NAME]

[TITLE]

TECHNICAL RESOURCE

[NAME]

[TITLE]

OPERATIONS

[NAME]

[TITLE]

BILLING

[NAME]

[TITLE]

# 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?

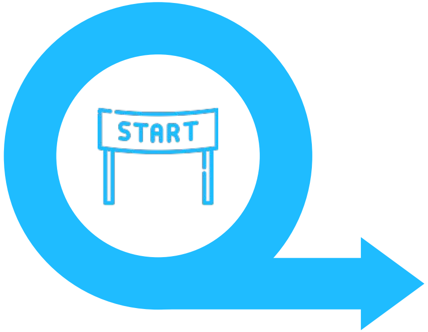
## COMMUNICATION

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

## SUCCESS

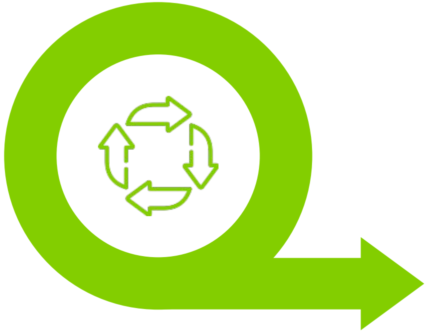
What does success look like for the partnership?

# START, STOP, CONTINUE




WHAT DO YOU WANT ME TO START DOING AS I TAKE OVER THE PARTNERSHIP THAT HADN'T BEEN DONE BEFORE?


WHAT DO YOU WANT ME TO STOP DOING AS I TAKE OVER THE PARTNERSHIP? ARE THERE THINGS WE WERE DOING THAT WERE NOT BENEFICIAL TO YOU AND THE TEAM?



WHAT DO YOU WANT ME TO CONTINUE TO DO AS I TAKE OVER THE PARTNERSHIP? ARE THERE THINGS THAT WE WERE DOING WELL THAT WE SHOULD KEEP DOING?

# 2. TEAM 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.

**TECHNICAL ENGINEER**
Technical Support
SUPPORT

Technical support resource available to answer technical platform related questions.

**KRISTI FALTORUSSO**
VP of Customer Success
CUSTOMER SUCCESS

Executive resource committed to the overall success of the partnership.

**GREGG FROHMAN**
Director, Consulting
SERVICES

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

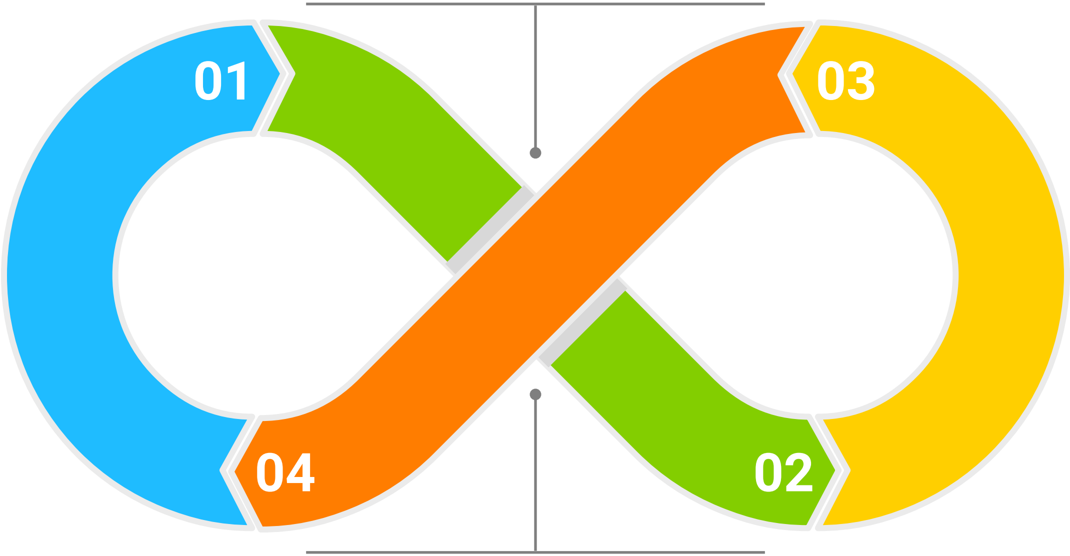
support@clientsuccess.com

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.

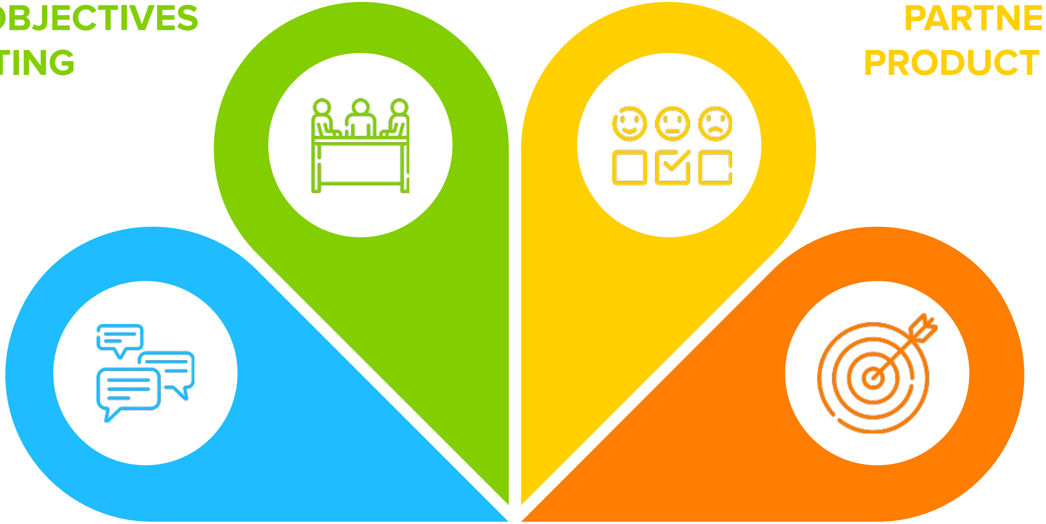
## 4. ADVOCATE

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

# PARTNERSHIP ALIGNMENT

**PARTICIPATION IN OUR CUSTOMER OBJECTIVES REVIEW MEETING**

**ONGOING PARTNERSHIP AND PRODUCT FEEDBACK**



**RECURRING CADENCE OF ENGAGEMENT**

**ALIGNMENT ON YOUR BUSINESS OBJECTIVES**

# 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

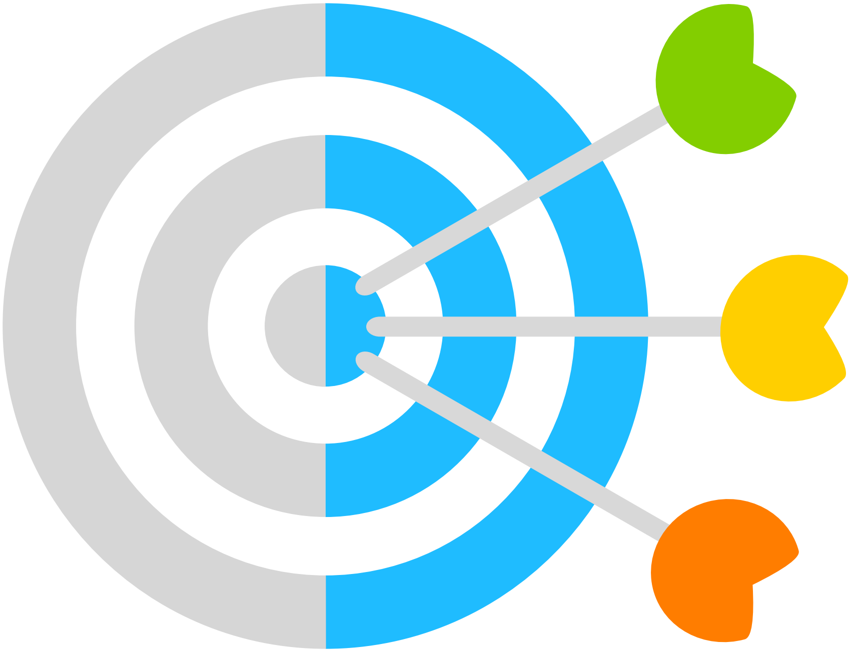
MITIGATE RISK

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. PARTNERSHIP REVIEW

# 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

# SUBSCRIPTION REVIEW

| DETAILS | |
|---|---|
| Renewal Date | |
| Opt Out | |
| Auto-Renewal Date | |
| Full License Count | |
| Full License Cost | |
| Lite License Count | |
| Lite License Cost | |
| NPS | |

SAMPLE

# PLATFORM AUDIT

| CONFIGURATION | Needs Attention | Opportunity to Optimize | Successful Deployment |
|---|---|---|---|
| We have a complete 360 degree view of the customer in ClientSuccess | | ✓ | |
| We have a complete, up-to-date, and directional picture of customer health | | | ✓ |
| We have well defined processes with robust management and measurement at key moments in the customer lifecycle | | ✓ | |
| We have a predictable view of future revenue | ✓ | | |
| We are automating key notifications and emails to drive efficiency and ensure a positive client experience | | ✓ | |
| We are instilling a customer-centric organization by communicating regularly across our company | | | ✓ |
| We have a foundation for success in the CSM team | | | |

# CURRENT SENTIMENT

| CONTACT NAME AND TITLE | CURRENT NPS SCORES | COMMENTS |
|---|---|---|
| Michael Smith<br>VP of CS | **8**<br>**(September 2021)** | |
| Mary Jones<br>Manager, CS | 5<br>(October 2020) | |
| Todd Anchor<br>CSM | **7**<br>(March 2021) | |
| | | |
| | | |

# 5. NEXT STEPS

# NEXT STEPS

- **ESTABLISH OUR RECURRING CADENCE**
  Set up the recurring meeting cadence for the partnership.

- **SCHEDULE OUR FIRST CUSTOMER OBJECTIVES REVIEW MEETING**
  Find a time in the next 90 days to have our first COR meeting with the team.

- **FOLLOW UP ON OPEN ITEMS**
  Take the time to outline any and all open items. Ensure there is a plan to tackle these in the coming weeks.

- **PLACEHOLDER**
  Use this if you have a 4th item to proactively call out

Q & A