

CUSTOMER SUCCESS LEADERSHIP BOOTCAMP

MANAGING THE RENEWAL PROCESS FROM START TO FINISH



KRISTI FALTORUSSO

Chief Customer Officer
ClientSuccess

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brought to you by

client**success**

THE RENEWAL
STARTS THE DAY
THE CONTRACT
IS SIGNED.

PERCEIVED VALUE

+

POSITIVE EXPERIENCE

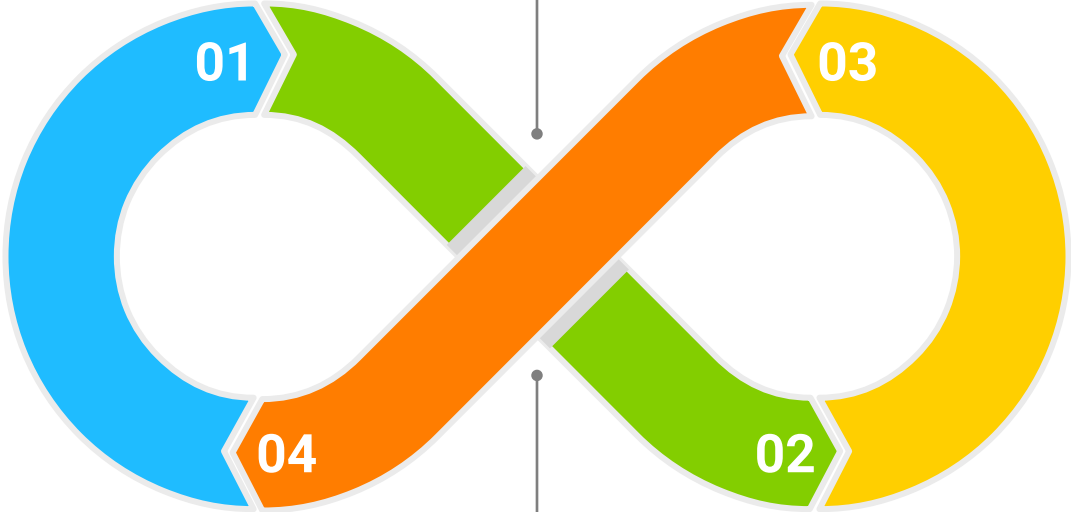
RENEWAL IN THE CUSTOMER LIFECYCLE

Set up for success.

2. EXECUTE

1. ALIGN

Set expectations.



3. REALIZE

Status check.

4. ADVOCATE

Run the process.

THINGS TO CONSIDER

TIMELINE

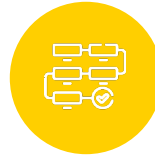
Determine the appropriate timeline to manage the renewal.
Account for complexity.



1

PROCESS

Design your process with all of the necessary steps your team will need to take.



3



OWNER

Who in your organization is best equipped to manage the renewal conversation and process.

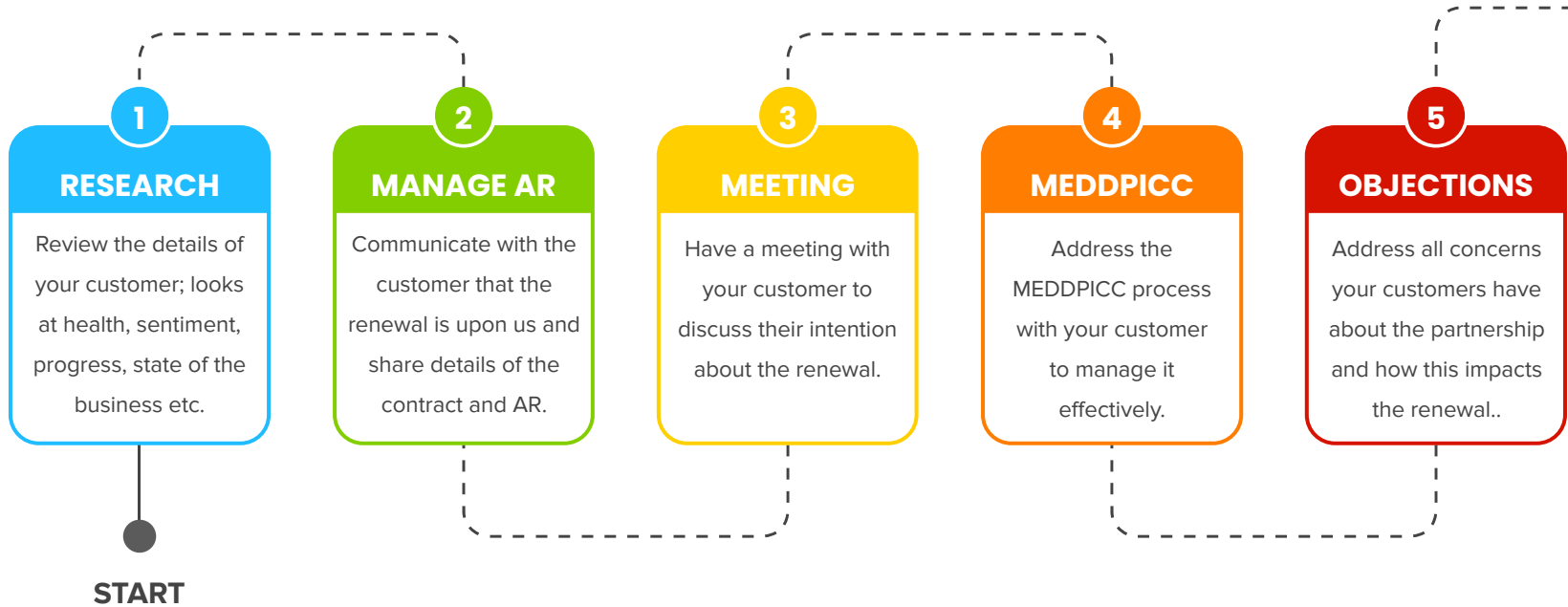
4



AUTOMATION

Are there aspects of the renewal that can be automated through technology to streamline the process.

10 STEP RENEWAL PROCESS



10 STEP RENEWAL PROCESS



BREAKING DOWN MEDDPIC



THINGS TO NAVIGATE

EARLY RENEWAL



DOWNSELL



ARR GROWTH



MULTI-YEAR



RENEWAL MISTAKES TO AVOID

1.

**LOCKING
CUSTOMERS
INTO AN
AUTO-
RENEWAL
WITHOUT
PROPER
COMMS**

2.

**STARTING
THE
RENEWAL
TOO EARLY
OR TOO LATE**

3.

**NOT HAVING
THE RIGHT
CONVO WITH
THE RIGHT
PEOPLE**

4.

**IGNORING
RED FLAGS**

5.

**FORECASTING
WITHOUT
HAVING
ACCESS TO
ALL OF THE
NECESSARY
INFO**

THANK YOU