

CUSTOMER SUCCESS LEADERSHIP BOOTCAMP

**Designing a Scaled
Customer Success
Program that
All Your Customers
Will Benefit From**

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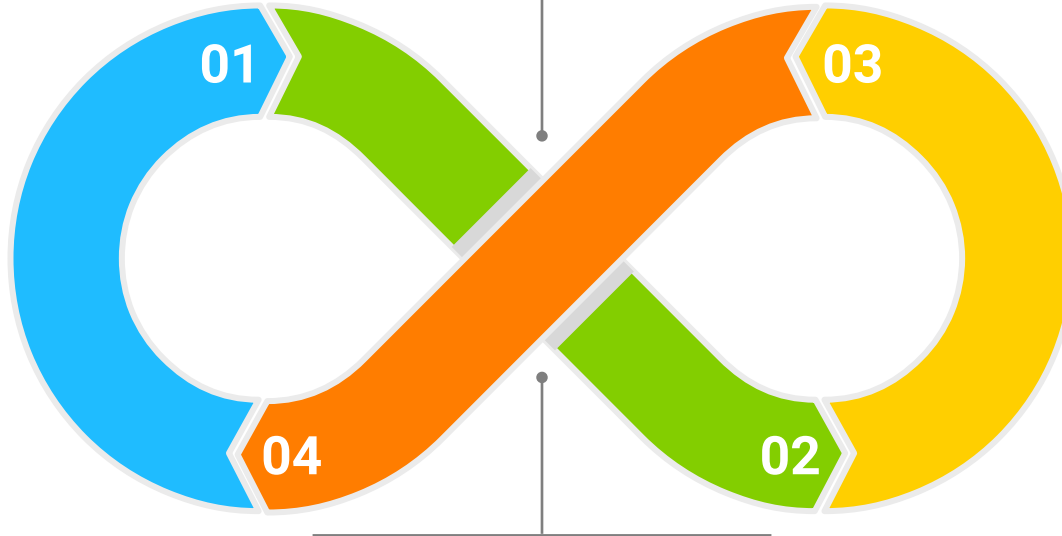
A Scaled Customer Success
Program Supports Your Ability
to Provide Value and Drive
Impact for More Customers
With Less Resources.

SCALED PROGRAMS
ARE ABOUT VALUE,
NOT TOUCHES.

SCALE IN THE CUSTOMER LIFECYCLE

Self guided onboarding, customer portal, product tips and case studies.

2. EXECUTE



1. ALIGN

Automated emails, surveys, and welcome videos.

3. REALIZE

Training webinars, newsletters, community forums, and in-app guides/tutorials.

4. ADVOCATE

Automated renewal program, customer advocacy initiatives and growth campaigns.

THINGS TO CONSIDER

VALUE

What value will this initiative bring to your customers? Will this enhance their value from the partnership?



1

TECHNOLOGY

What technology do you have access to to support your scaled efforts? Think outside of CS.



3



EXPERIENCE

Can you create a positive experience through your scale approach or will this negatively impact your customer?

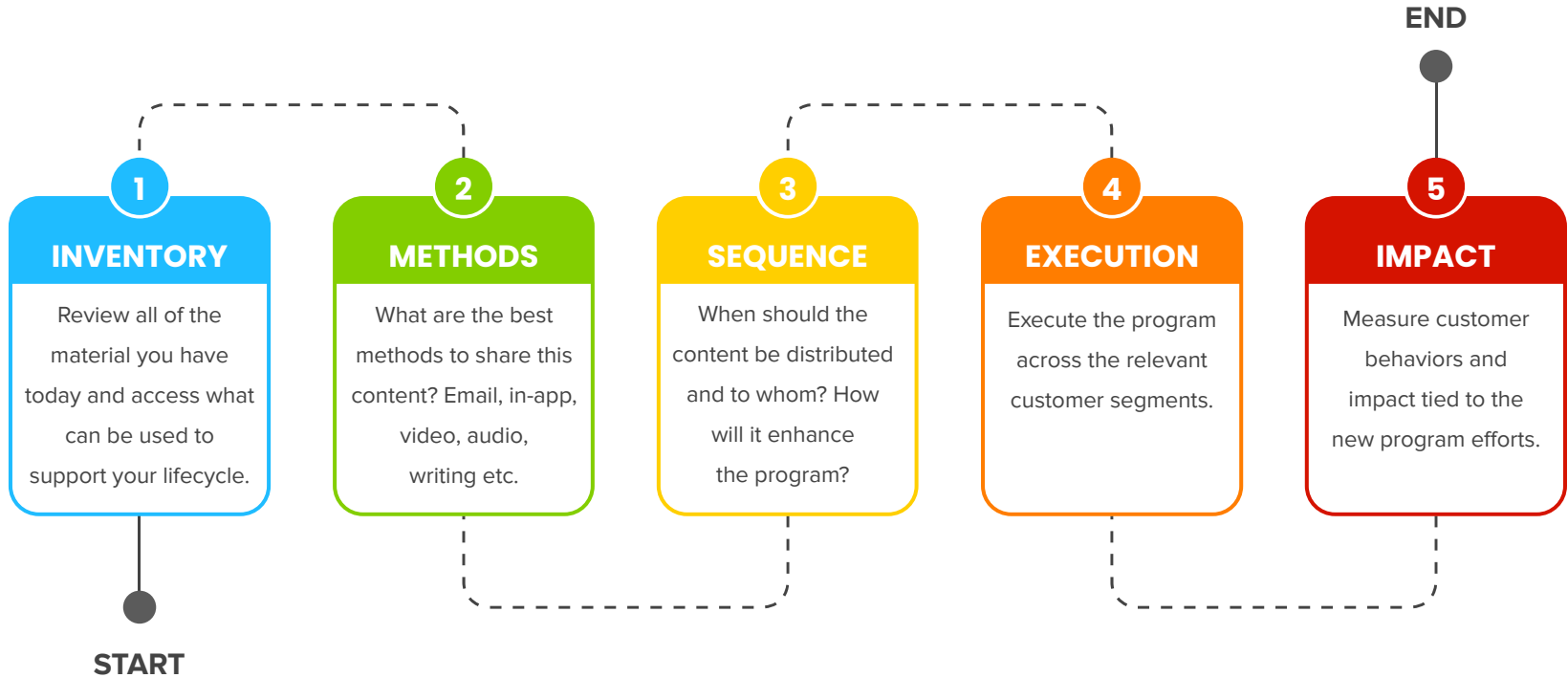
4



MEASUREMENT

How will you measure the effectiveness of your efforts? What KPIs will you track?

5 STEP SCALE PROCESS



GETTING STARTED WITH SCALED PROGRAMS

WHERE TO START



ONBOARDING

- Welcome email and instructions
- Product training videos
- In-app walkthrough guides
- Well established Knowledge Base
- Group Onboarding
- Office Hours
- Use Cases



COMMUNITY

- Slack groups/ Community Forums
- Office Hours
- CAB/PAB
- Networking Events
- Beta Groups
- Customer Marketing initiatives
- Round Table Discussions



RENEWAL

- Renewal Survey
- Renewal Reminders
- Auto-renewal Communication
- Renewed Communication
- Post-Renewal Engagement
- Pricing Management
- Self Service Renewals

SCALE MISTAKES TO AVOID

1.

DON'T ASSUME THESE EFFORTS ONLY BENEFIT YOUR SMALLER CUSTOMERS.

2.

DON'T REINVENT THE WHEEL, START WITH WHAT YOU HAVE.

3.

DON'T FORGET TO GET FEEDBACK FROM YOUR CUSTOMERS.

4.

DON'T SET IT AND FORGET IT. MAKE SURE TO GO BACK AND ITERATE ON THE PROGRAM.

5.

DON'T ATTEMPT TO SCALE YOUR EFFORTS UNLESS IT'S MUTUALLY BENEFICIAL.

THANK YOU

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