

# client success

REDUCE CHURN. INCREASE EXPANSION.  
MAXIMIZE REVENUE.

Customer Success Framework  
August 2021



# CUSTOMER JOURNEY OBJECTIVES

Provide a prescriptive and intentional journey for your customers to ensure a successful, long-term, predictable and mutually beneficial partnership.



Bridge the gap  
between  
cross-functional  
teams



Better  
understanding  
of your  
customers



Establish mutual  
alignment with  
your customers



Predictive  
patterns of  
behaviors



Opportunities  
to delight your  
customers



Built in Voice  
of the  
Customer

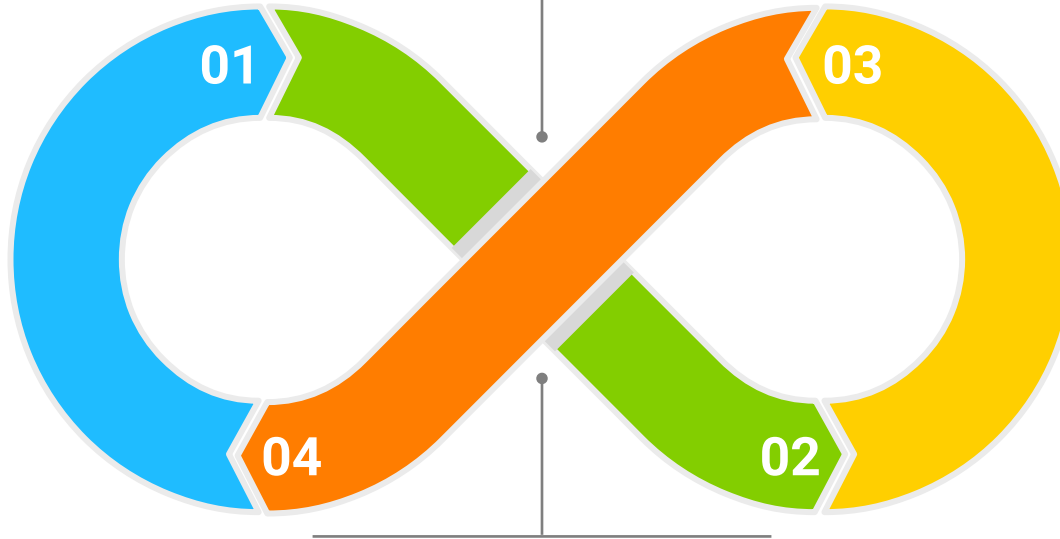
# CUSTOMER JOURNEY STAGES

## 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.

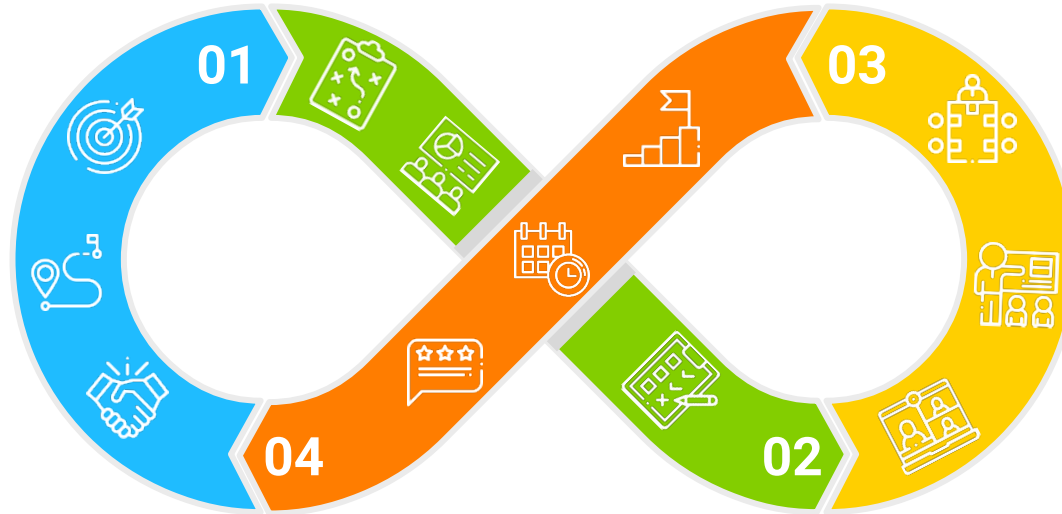
# CUSTOMER JOURNEY

## 1. ALIGN

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

## 4. ADVOCATE

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



## 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

# ALIGN

Days [X]

## **Objective:**

[Determine the objective of this stage]

## **Entrance Criteria:**

- [Set your entrance criteria]

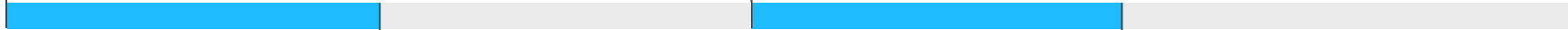
## **Exit Criteria:**

- [Set your exit criteria]

# JOURNEY STAGE 1: ALIGN

WELCOME EMAIL

PARTNERSHIP ALIGNMENT  
MEETING



KNOWLEDGE TRANSFER



FOLLOW UP AND KICKOFF

# EXECUTE

Days [X]

## **Objective:**

[Set your stage objective]

## **Entrance Criteria:**

- [Your entrance criteria should be the same as the exit criteria from the previous stage]

## **Exit Criteria:**

- [Set your exit criteria]

# JOURNEY STAGE 2: EXECUTE

ONBOARDING KICKOFF

POST ONBOARDING  
WRAP UP



PLATFORM CONFIGURATION  
AND END USER TRAINING



ONBOARDING  
SURVEY



# REALIZE

Days [X]

## **Objective:**

[Set your objective]

## **Entrance Criteria:**

- [Your entrance criteria should be the same as the exit criteria from the previous stage]

## **Exit Criteria:**

- [Set exit criteria]

# JOURNEY STAGE 3: REALIZE

RECURRING STRATEGY  
CALLS

CUSTOMER OBJECTIVES  
REVIEW (COR) MEETING



# ADVOCATE

Days [X]

## **Objective:**

{Set your objective}

## **Entrance Criteria:**

- [Your entrance criteria should be the same as the exit criteria from the previous stage]

## **Exit Criteria:**

- [Set your exit criteria]

# JOURNEY STAGE 4: ADVOCATE

SUCCESS STORY

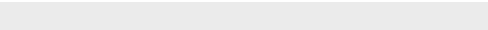
GROWTH MANAGEMENT



RENEWAL MANAGEMENT



ADVOCACY



THANK YOU