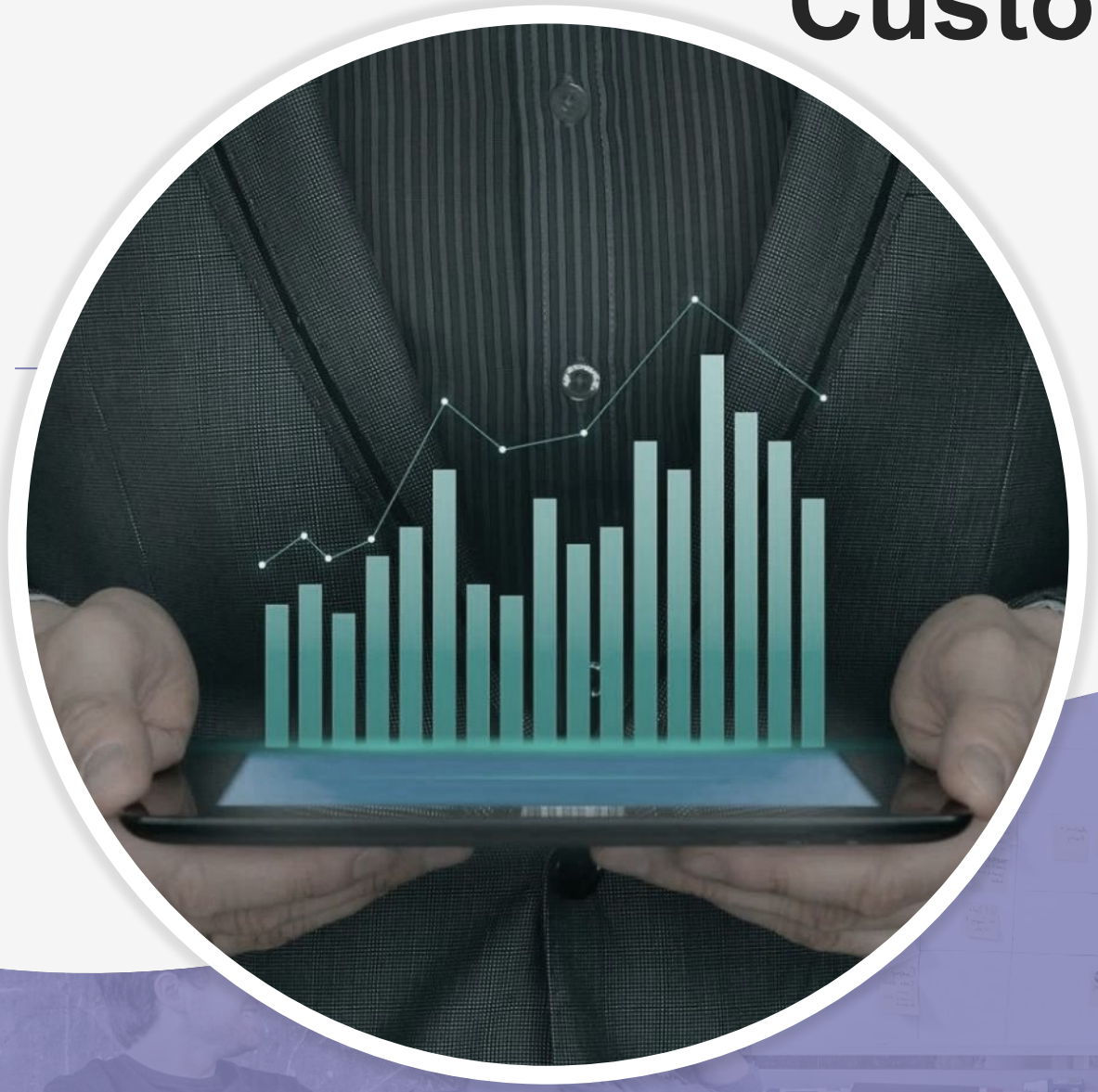
Customer Success Playbook



Your Company Name

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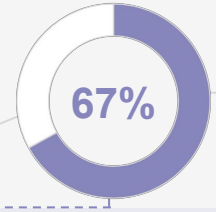
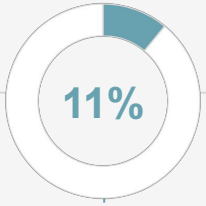
Why Customer Success is the New Measure of Business Success

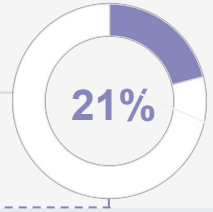
The following slide depicts statistical data about customer success, which is now measured as one of the factors contributing to business success. Stats covered are of business value, customer centric approach etc.



Of the companies are collaborating with customers to create **new business value**



Of the companies claim to have a strong **customer-centric approach**



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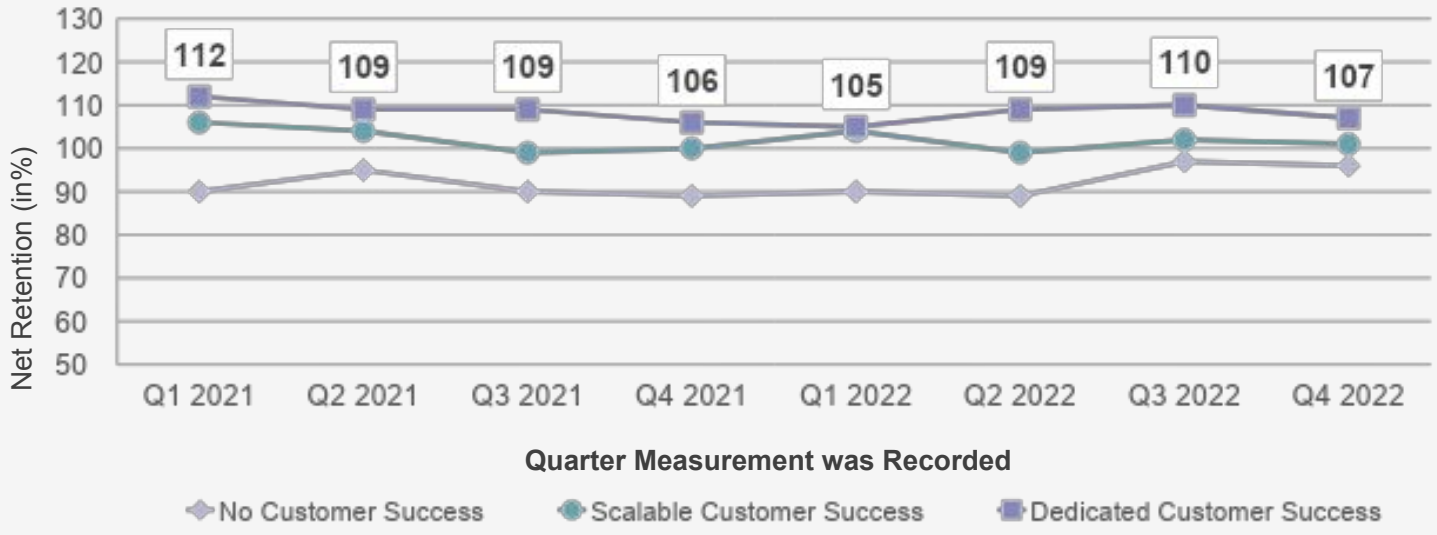
Influence of Customer Success on Net Retention (in %)



Key Takeaways

- Companies implementing customer success strategies are seeing **higher net retention rate up to 112%** (Dedicated Customer Success)
- Add text here

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Why Every Business Needs Customer Success

Purpose of this slide is to inform new members about the business requirements for customer success. Requirements covered in the slide are related to contract value, churn rate, customer experience and satisfaction.

Following are the major requirements of businesses for customer success

Enhance the **Customer Experience and Satisfaction**

Lower Down or Manage **Churn**

Add Text Here

Increase the **Contract Value** of Existing Customers

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Addressing Our Four Stage Customer Success Framework

This slide highlights company's customer success framework. It includes stages namely onboarding, adoption, optimize and expand, beyond one year.

Lifecycle Stages	Customer Success	Assurance Services
Onboarding	› Define Success › Assist In Plan Development	› Perform system configuration tasks › Streamline system adoption process using specific tools
Adoption	› Provide Recommendations › Track Progress And Performance	› Develop improvement plan › Conduct training to drive adoption
Optimize and Expand	› Validate Performance › Add Text Here	› Conduct skills development workshops › Add text here
Beyond Year One	› Ensure that the solution is aligned with the customer success goals › Add Text Here	› Provide support for renewed business goals › Add text here

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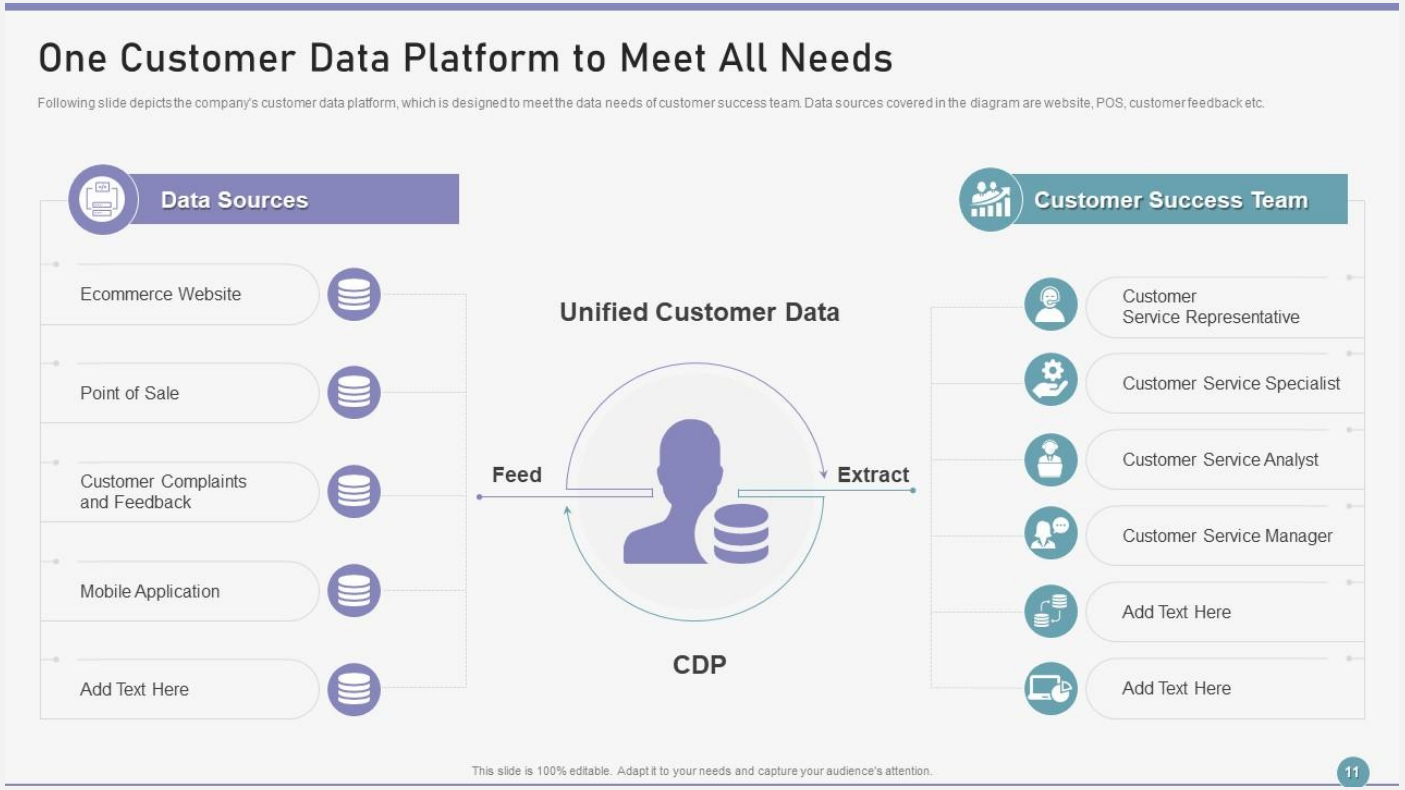
- A **Customer Success playbook** is a series of proactive and best practise tasks that Customer Success Managers must take.
- It is a set of actions that can be assigned to an account or a group of users at various stages of their customer journey to assist them in successfully adopting your product.



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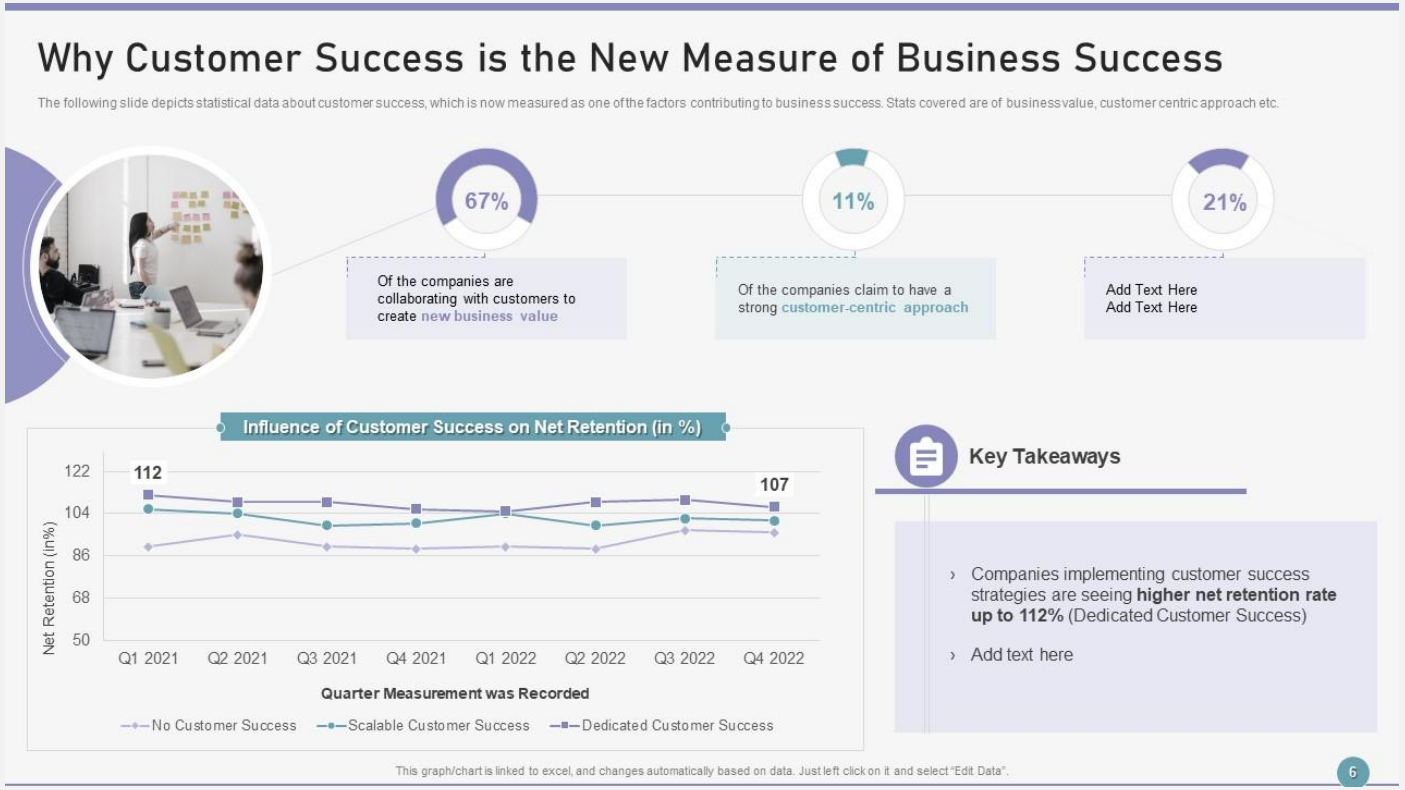
➔ **Customer success** is a business strategy that employs your product or service to assist customers in achieving their goals.



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- As a **customer success manager**, also known as a client success manager, customer service manager, or CSM .
- CSM are responsible for creating long-term customer connections and building customer loyalty by ensuring that consumers have a great experience.

Customer Success Training Workshop for Support Team

Mentioned slide showcases training workshop schedule for customer success. Sections covered in the table are time, workshop activity, description and comments.

Time	Workshop Activity	Description	Comments
9:00 AM	Welcome Notes	Executive Intro	Add Text Here
9:15 AM	Course Introduction	Course objectives are addressed	Add Text Here
10:00 AM	Break	Tea/Coffee break	Add Text Here
10:15 AM	Importance Of Customer Success	Major customer success trends and impact on business performance	Add Text Here
11:30 AM	Tools And Techniques	Handling customer queries using various impactful tools and techniques	Add Text Here
1:00 PM	Lunch	Fuel Up	Add Text Here
2:00 PM	SPI Activity	Situation, Plan and Impact questions based on different personas	Add Text Here
3:00 PM	Ending Activity	Add Text Here	Add Text Here

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14

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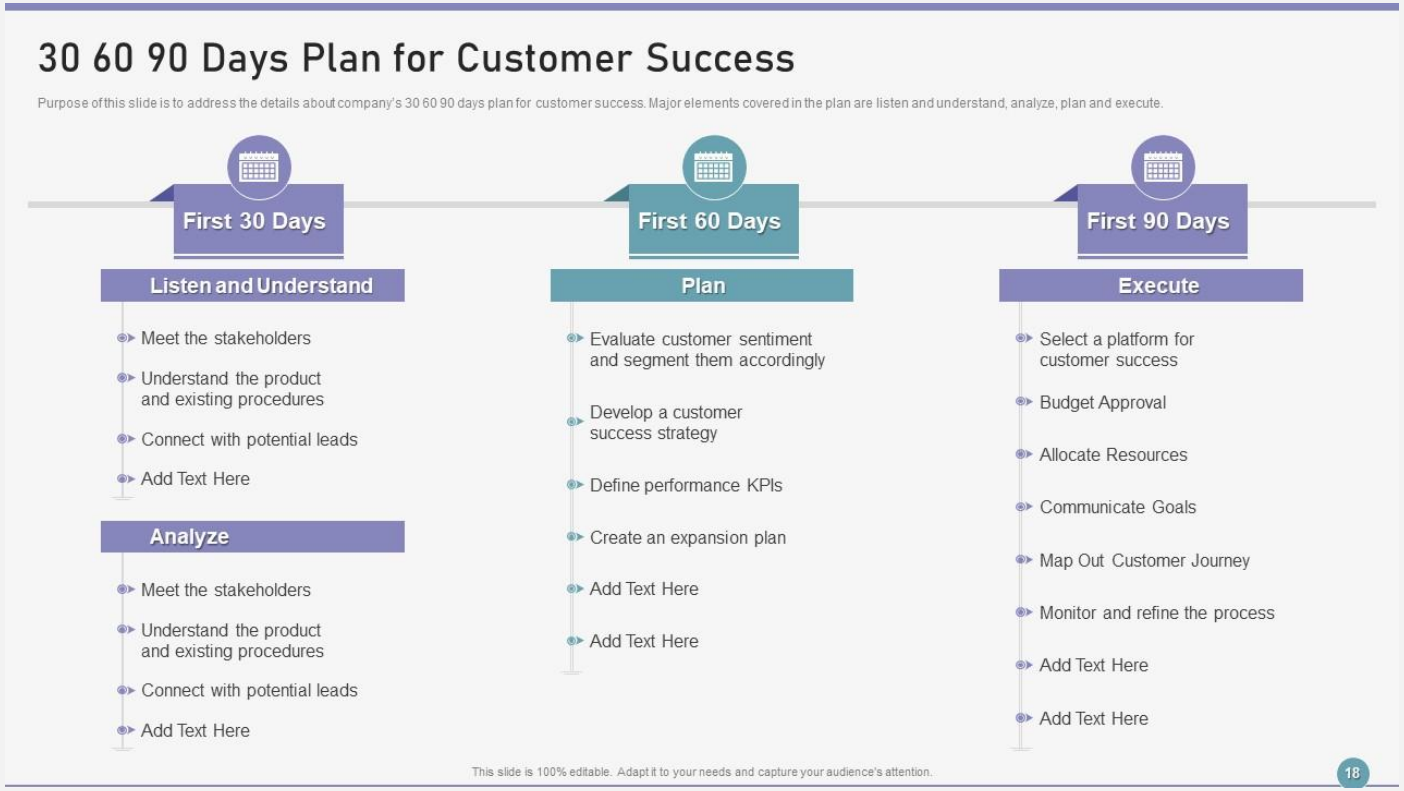
- A **30-60-90** day plan is a document written by a new employee or a hiring manager that describes the goals to be met within the first three months of employment.
- It divides goals into 30-, 60-, and 90-day intervals.



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FAQs

What does a training workshop accomplish?

- ➔ A workshop is often a quick intensive educational programme for a small group of people that focuses on techniques and abilities in a certain sector.
- ➔ This group of people with similar interests usually gets together to debate and research a specific topic or project.

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FAQs

What should a 30-60-90-day plan include?

➔ While there is no defined duration for a 30-60-90 day plan, it should include information regarding onboarding and training, set goals for the end of each phase, and all the individuals to meet and materials to review in support of those goals.

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FAQs

What are the five fundamental elements of a satisfied customer?

- ➔ Speed.
- ➔ Accuracy.
- ➔ Accountability.
- ➔ Quality.
- ➔ Transparency.

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