Customer Success Templates

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Table of Contents

QBR Template

Attendees:

Name	Title	Department	Company

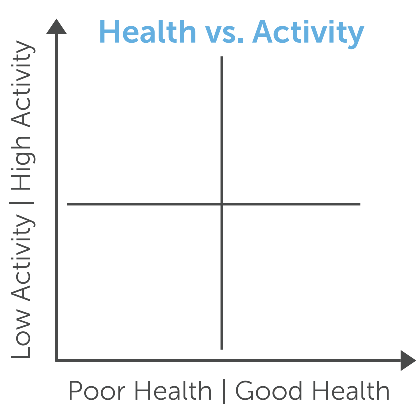
Complete, Outstanding, & New Items:

Completed Items Sinze Last QBR	Outstanding Items From Last QBR	New Items to Be Completed In the Next Quarter

Metrics: Which metrics are used to measure success? (Churn, Retention, Sales Qualified Leads, KPIs etc.)

Metric	Value	Notes

Health Review



Health Score	Activity Score

Conclusion
Only ___ out of ___ accounts are highly active. Overall health is - Poor / Good / Very Good / Excellent **Notes**

Analysis of User Health:

Name	Title	Last Activity

Onboarding Tracker:

Activity	Adoption Rate	Users Who Have Completed Activity	Users Who Have Yet to Complete Activity

Ticket Tracker: Number of Tickets: _____

Date	Description	Category	Duration	Status

NPS Score Review: Average NPS Score: _____

User	Company	NPS Score

Summarized Quarter Plan

Time Period	Activity	Plan

Customer Success Strategy Template

1. Define Goals & Key Focus Areas: Keep goals simple and clear.

Goal	Key Focus Area

2. Needs Analysis:

Issue	Drivers & Barriers to Adoption	Methodology Used

3. Customer Segmentation

Issue	Drivers & Barriers to Adoption	Methodology Used

4. Identify if customer segments are suitable for Self-Service or Professional Service:

Self-Service : Usually assigned to lower value customers. Basic toolkits and guides can be provided for assistance in the development of their ROI / user adoption programs. This approach tends to be low in cost, but sometimes low in effectiveness if their issue is complex.

Professional Service : Usually assigned to more valuable customers. A full professional service is offered to help them, maximize adoption, and increase ROI through the lifetime of the system. You can provide PS via Build, Buy, or Partner . The first step is to decide how to provide the professional service.

- **Build it** - Do you want to develop internal user adoption and ROI expertise within your company?
- **Buy it** - Do you want to just bring in expertise on an as-needed basis?
- **Partner** - Do you want to stay focused on the technical expertise in your company while also ensuring customers have the service they need to sustain ROI over the long-term?

Customer	Type of Service (Self / Professional)	How? (Build / Buy / Partner)

5. Plan from Customer's Perspective

Technical Set-Up
Activities: ___
Timeline: Week __

Orientation
Activities: ___
Timeline: Week __

Active
Activities: ___
Timeline: Week __

Full Pace
Activities: ___
Timeline: Week __

Initial Value
Activities: ___
Timeline: Week __

Progress
Activities: ___
Timeline: Week __

Achievement
Activities: ___
Timeline: Week __

Renewal
Activities: ___
Timeline: Week __

Customer Success Story Template

The Challenge:

Challenges	Painpoints	Objectives	Why did they choose you?

The Solution:

Problem	Duration	Actions Taken

The Results:

Statistic	Before	After

- What positive impacts resulted? Did they save money, time and/or improve efficiency? Did morale, visibility and market-share increase?
- Why should prospects choose you?
- What are the possible call-to-actions?
- Add a customer testimonial to increase credibility.

Name	Testimonial

Customer Onboarding Checklist

External Checklist

(Tasks / actions that your client is involved in)

- ☐ **Welcome** : Send a welcome email
- ☐ **Kick-off Call** : Call customer to make personal connection and communicate key project information
- ☐ **Expectations** : Discuss major milestones and deadlines
- ☐ **Process** : Reiterate through the entire project process
- ☐ **Education** : Provide educational and training materials on project process
- ☐ **Questionnaire** : Get all the information you need for the project
- ☐ **Check-In** : Check-in with your customers to see if they need help
- ☐ **Satisfaction Survey** : Get feedback from your customers

Internal Checklist

(Behind-the-scenes tasks / actions)

- ☐ **Update of CRM** : Add customer into your CRM system
- ☐ **Project List Update** : Update customer details, project status and deliverables
- ☐ **Schedule Training & Checkpoints** : Use workflow automation to log the consecutive steps

New Account Handoff Template

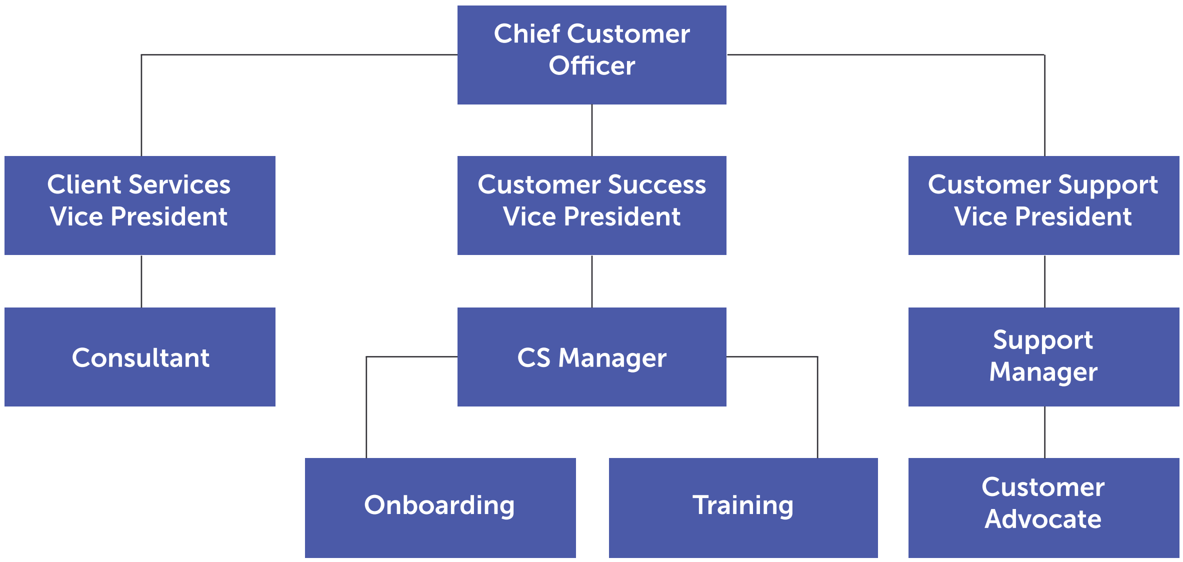
Account Information:

Account Name	
Annual Contract Value	
Account Objectives	
Key Customer Challenges	
Issues Discussed	
Additional Customer Notes	
Assigned CSM	

Company Information

Annual Revenue	
# of Employees	
Account Executives	
Phone Number	
Email Address	

Customer Success Organization Template



The above shows a generic Customer Success organization structure. The Customer Success structure of each organization can differ depending on factors such as the desired area of focus of the organization.

Examples of Customer Success Team Roles:

Professional Services: Provide technical and business advisory services to guide customers

Customer Support: First point of contact who handles all customer cases, calls, and escalations

Education & Training: In charge of the development and delivery of any training collateral, courses, tutorials, and documentation.

Customer Advocacy: Handle customer experience and drive relationships

Customer Journey Template

Process	(Event 1)	(Event 2)	(Event 3)	(Event 4)	(Event 5)
Customer Goals					
Touchpoints & Emotional Response					
Customer Thoughts					
Customer Experience (Excellent / Very Good / Good / Fair					
Potential Improvements					

Strategic Account Plan Template

Date: ____________________________

Account Type: ______________________

Account Owner: ____________________

Client Sponsor: ____________________

Account Name: _____________________

Financials:

Plan Financial Year Account Sales Goals	$
Last Financial Year Account Sales	$
Account Sales Growth	%

Plan Financial Year Product Sales Goals	$
Last Financial Year Product Sales	$
Product Sales Growth	%

Account Goals		
	1 Year Goal	3 Year Goal
Revenue Goal		
Customer Success Goal		

OBJECTIVES What needs to be achieved to meet the goals outlined?	
Revenue Goal -	
Objective:	**By:**
Objective:	**By:**
Objective:	**By:**
Customer Success Goal	
Objective:	**By:**
Objective:	**By:**
Objective:	**By:**

State the tasks that need to be conducted to meet the objectives stated above.

OBJECTIVE			
Task	Assigned To	Date	Status

OBJECTIVE			
Task	Assigned To	Date	Status

Client Review Meeting Checklist

Before the Meeting

- [ ] Block out the meetings on your calendar
- [ ] Email clients to confirm meeting schedule and agenda
- [ ] Review and update client profiles
- [ ] Prepare for client concerns

During the Meeting

- [ ] Follow the agenda
    - [ ] Agenda 1
    - [ ] Agenda 2
    - [ ] Agenda 3
- [ ] Review actions
- [ ] Gauge client's satisfaction
- [ ] Schedule next meeting

After the Meeting

- [ ] Send a follow-up email
    - [ ] Within 2-3 business days from date of meeting
    - [ ] Review key points discussed in the meeting
    - [ ] List all follow-up actions required clearly with details
    - [ ] Prompt clients to respond with any additional inputs
- [ ] Make sure there is a mutual agreement between you and the client on:
- [ ] Client's goals
- [ ] Progress
- [ ] Action steps
- [ ] Any other matters

QBR Checklist

- [ ] **Agenda Review** - Discuss agenda with other stakeholders ahead of time and ensure that it includes what they want to cover.
    - [ ] Draft a roadmap for the meeting that structures the meeting effectively

- [ ] **Current Situation**
    - [ ] Any change(s) in your client's situation, e.g. changes in processes, product, organization etc.

- [ ] **Results of Previous Quarter**
    - [ ] Milestones achieved
    - [ ] Increase/decrease in adoption rate, number of users etc.
    - [ ] Challenges faced

- [ ] **Plan for Upcoming Quarters**
    - [ ] Areas for Improvement
    - [ ] Goals
    - [ ] Action Plan

- [ ] **Summary of Meeting**
    - [ ] New Developments
    - [ ] Unmet Pain Points
    - [ ] Summary of last quarter
    - [ ] Short-term plans for next quarter
    - [ ] Long-term plans for the future

Customer Success Checklist

CS Team:

- ☐ Documented job roles and responsibilities, expectations, and performance metrics for each CS team member
- ☐ Reward / recognition system to motivate members
- ☐ Individual performance review of each member
- ☐ Development and training plans
- ☐ Knowledge and skills level of team members match requirements of the various CS processes
- ☐ Formal screening methods for job applicants for required experience, knowledge, skills and personality characteristics
- ☐ Take action based on periodical CSM engagement and satisfaction review

Planning:

- ☐ Documented Customer Success Plan (goals, strategies, objectives, metrics, timelines, actions required)
- ☐ Goals and objectives aligned with overall business plan and processes
- ☐ Overall plan enhances the organization's value proposition, sustainability and competitiveness within the industry
- ☐ Track progress of plan execution and results
- ☐ Periodic meetings to share status and progress of plan with other functions in the organization
- ☐ Review and update plan at least once every year

Segmentation:

- ☐ Analyze similarities and differences between each customer segment
- ☐ Define personas of each segment
- ☐ Gather data (e.g. customer feedback from surveys, business reviews) based on segment and persona
- ☐ Incorporate analysis of segments in corporate and functional planning processes

Processes:

- ☐ Conduct processes based on the matching of respective segments with the appropriate customer journey
- ☐ Customer experience design aligns with the requirements and expectations of the different segments
- ☐ Define and implement appropriate triggers, actions, & metrics in the workflows
- ☐ Optimize all available resources
- ☐ CS processes and systems add value and fulfill organization's value propositions

Metrics:

- ☐ Metrics include a mix of both leading and lagging indicators
- ☐ Selected metrics track progress of the points in development plans effectively
- ☐ Appropriate indicators are set when action is required
- ☐ Conduct of regular review based on metrics
- ☐ Regular refinement and update of metrics

Management:

- ☐ Management leaders make effort to reinforce organization's vision, value propositions, priorities, and plans
- ☐ Management leaders provide necessary support to ensure accomplishment of goals
- ☐ Management leaders encourage and focus on participation and learning
- ☐ Management leaders support open communication culture where feedback is encouraged from employees, customers, partners and other stakeholders
- ☐ Management leaders actively drive organizational change and development

Customer Success Budget

Quarter 1 Budget:

Expense Category	Jan 16		Feb 16		Mar 16		Q1	
	Budget	Actual	Budget	Actual	Budget	Actual	Budget	Actual
Product Marketing								
Paid Advertising								
Branding								
Events								
Training								
Product Development								
Totals								
Q1 - Total Budget Variance (Actual - Budget)								

Quarter 2 Budget:

Expense Category	Jan 16		Feb 16		Mar 16		Q1
	Budget	Actual	Budget	Actual	Budget	Actual	Budget
Product Marketing							
Paid Advertising							
Branding							
Events							
Training							
Product Development							
Totals							
Q1 - Total Budget Variance (Actual - Budget)							

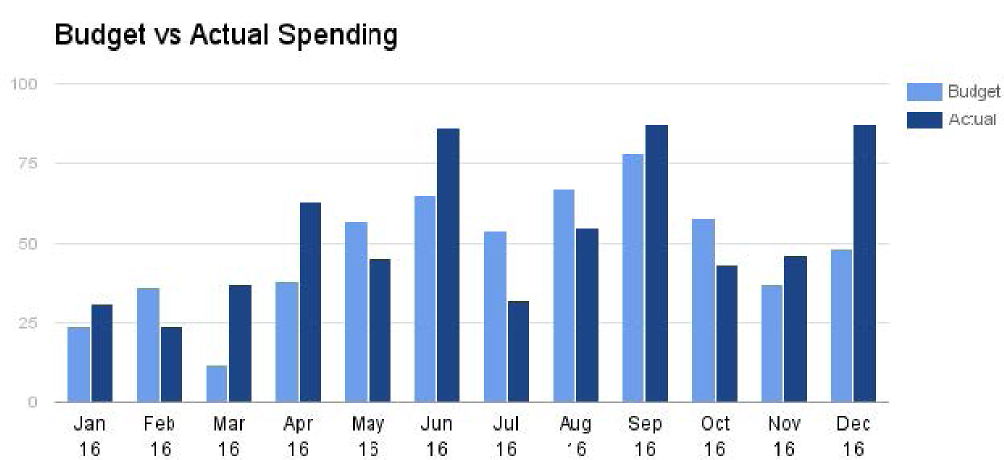
Quarter 3 Budget:

Expense Category	Jan 16		Feb 16		Mar 16		Q1	
	Budget	Actual	Budget	Actual	Budget	Actual	Budget	Actual
Product Marketing								
Paid Advertising								
Branding								
Events								
Training								
Product Development								
Totals								
							Q1 - Total Budget Variance (Actual - Budget)	

Quarter 4 Budget:

Expense Category	Jan 16		Feb 16		Mar 16		Q1
	Budget	Actual	Budget	Actual	Budget	Actual	Budget
Product Marketing							
Paid Advertising							
Branding							
Events							
Training							
Product Development							
Totals							
							Q1 - Total Budget Variance (Actual - Budget)

Expense Summary	Budget	Actual	Budget Variance	Cumulative Budget	Cumulative Spending
Jan 16					
Feb 16					
Mar 16					
Apr 16					
May 16					
Jun 16					
Jul 16					
Aug 16					
Sep 16					
Oct 16					
Nov 16					
Dec 16					
Total					



Customer Success Plan Template

New Customer Kick-off Call:

Prepare for the Call	Collect key customer data such as customer name, email & contact information, and information on plans signed up for by the customer. Identify pertinent information that needs to be communicated to the customer.
Call the Customer	Communicate key objectives with the customer. Detail the onboarding process. Clearly communicate expected goals. Discuss timelines and milestones. Generate a kick-off call document, summarizing the call.
Incorporate Feedback Ideas from Kick-Off Call	Incorporate any customer recommendations that have been agreed to in the kick-off call.

Onboarding - For Free Trials

Self-Service Sign-Ups	Automate as much of the process as possible. Collect basic information.
Welcome Email	Immediately follow up with a welcome email after sign-up. Provide information to enable trial user to start using the solution, and provide links to tutorials and help forums.
Automate the Process as Much as Possible	Enable customers to experiment with the solution, through automated help & suggestions, without involving human interaction until necessary. Ensure that each decision in the free-trial process is metrics driven. Use these metrics to determine what aspects of the product/usage experience led to a higher conversion rate.
Identify the Customer's Time to First Value	When your free trial user reaches a key milestone in usage, hand-off to sales to convert the free-trial user into a paying customer.
Solicit Feedback	Solicit feedback from trial users that signed up & those that did not.

Onboarding - For Paying Customers:

Record / Verify / Update Customer and Project Information	Verify the correctness of customer information from your CRM solution. Correct / add necessary information. Update customer details, project status, and deliverables.
Welcome Email	Immediately follow up with a welcome email after sign-up. Provide information to enable user to start using the solution, + provide links to tutorials & help.
Set Up a Communications Plan	Set up a plan to regularly communicate with the customer. Ask them for feedback and if their needs are being met. Collect customer insights to target customers with what they're interested in.
Set Up a Support Strategy	Analyze usage data to identify customer potential usage issues. Develop a proactive support strategy.
Check-In With Customers Regularly	Focus on educating the customer. Set up a schedule for communication that allows you to connect often without alienating customers. Leverage your data so that when you get in touch with a customer it's about their specific needs. Ask for feedback or if their needs are being met.

Onboarding - For Paying Customers:

Monitor Your Metrics	Track KPIs & key metrics affecting customer health.
Provide Education and Guidance as Necessary	Offer in-app text and voice chat as needed. A high touch approach may be needed for customers if your app has a high learning curve and has numerous and complex features.
Set up QBRs and Annual Reviews	Conduct QBRs regularly and communicate results. Document improvements in the product and/ or process as a result of the QBR & update the profile.
Create Recurring Onboarding Cycles Every Time a Major Feature is Released	Ensure that that customer is onboarded for the new feature, and is able to use it effectively.
Check In With Customers On a Regular Basis	Set up a communications plan to disseminate key information, receive feedback, and identify sponsors.
Coordinate with Other Sales, Support, Marketing and Finance	Set up a communications plan to disseminate key information, receive feedback, and identify sponsors.

Customer Success Weekly Status

Overall Status:

	No. of Customers	Change from previous week
Health - Good		^ [+#]
Health - Average		^ [+#]
Health - Poor		^ [+#]
New Customer (30 Days)		^ [+#]
Pre-renewal (60 Days)		^ [+#]
Pre-renewal (90 Days)		^ [+#]

Tasks Completed This Week	Completed By:

Tasks In-Progress	Person in Charge:

Tasks Completed This Week	Completed By:

Customer Success KPIs

KPI	Definition	Calculation	Success Indicators
Month Recurring Revenue (MRR)	Income that a company can reliably anticipate every 30 days	(# of customers) * (Average billing per customer per month)	Increase in amount
Net New MRR	Net MRR after taking into account new subscriptions, churn, and expanded subscriptions from existing customers	(New MRR) + (Expansion MRR) - (Churn MRR)	Increase in amount
Revenue Growth Rate	Rate of growth of MRR over previous month.	(Current MRR) - (Last month's MRR) / (Last month's MRR) * 100	Increase in rate
Churn Rate	The percentage rate at which customers cancel their recurring revenue subscriptions.	(# of customers cancelling for a given period) / (Total # of customer for the given period)	Decrease in number
Customer Acquisition Cost (CAC)	Cost of acquiring a customer	(Marketing + Sales expenses) / # of new customers added	Decrease in number
Customer Lifetime Value (CLV)	A prediction of the net profit attributed to the entire future relationship with the customer	(Average MRR for the customer) * (Customer Lifetime) where Customer Lifetime = 1 / churn rate	Increase in number
LTV:CAC Ratio	Lifetime Value over Customer Acquisition Cost	LTV / CAC	Should be higher than 3
Months to Recover CAC	Time before revenue from an account exceeds cost of acquisition	CAC / Avg. MRR per customer	Months to recover CAC should be less than 12 months
Inbound Lead Velocity	The rate at which qualified, inbound leads are growing month-over-month	(# of leads in current month - # of leads in the previous month) * 100%	An increase in the rate
Customer Retention Rate	Percentage of customers lost	[1- (Customers lost in a given time period / total number of customers acquired in the same time period)] *100%	An increase in the rate

Customer Success ROI

Metrics Used to Measure ROI	Definition
Ticket Resolution Time	The average time taken to resolve a support ticket
No. of Renewals	The number of contracts that have been renewed within a period of time
Number of Upsell	Upsell occurs when a customer is induced to purchase more expensive products, upgrades, or other add-ons. Cross-sell occurs when a customer purchases some other additional product.
Number of Cross-sell	Cross-sell occurs when a customer purchases some other additional product.
Number of Conversions	The number of customers who have successfully converted from a trial. Value realization has taken place.
Monthly Recurring Revenue (MRR)	The anticipated income of a company for every 30 days.
Annual Recurring Revenue (ARR)	The anticipated income of a company in one calendar year.

Customer Success Job Template

Job Description:

This position focuses on championing customer centric solutions and outcomes. You will work closely with engineering, operations, sales and support teams to understand and resolve customer issues. You will have a strong understanding of our customers' business objectives, and the ability to identify and articulate how our solution supports achievement of customers'strategic goals.

Responsibilities:

- Become a client advocate and product specialist.
- Identify at-risk accounts, and take appropriate action and/or escalate as needed.
- Identify and develop cross-sell opportunities.
- Work with Operations to ensure smooth onboarding of new customers.
- Regularly monitor customer health, and communicate results with Account Managers, when necessary.
- Ensure positive customer experiences by proactively managing and growing customer relationships, including identifying key stakeholders.
- Review client requests with operations, technical support, or engineering and take action as necessary.
- Schedule and conduct regular reviews with clients and communicate results.
- Develop, prepare, and nurture customers for advocacy.

Desired Skills and Experience:

- Experience interfacing directly with clients, preferably at the executive level.
- Experience with SaaS products, competency with CRM systems or Customer Success Management platforms.
- Previous experience in a similar role as a Helpdesk Manager, Product Support Manager or Customer Operations Manager.
- Ability to multi-task, problem solve, and work cross-functionally in a dynamic environment
- Excellent verbal and written communication skills.
- Energetic, motivated and self-driven.

Customer Success Implementation

Onboarding:

The stage after product purchase and before realization of first value.

The right support and resources have to be provided to customers in order to help them realize first value in the product and deploy it across their organization.

Actions:

- First interaction: New account setup
- Set customer expectations
- Discuss product use cases
- Training: Webinars, Tutorials, Help materials
- Provide technical support to customers
- Collect feedback on the initial customer satisfaction
- Regular check-in emails and calls

Post-Conversion:

The stage where customers have converted into established and active users of your product and they have begun to see value in your product.

It is important for CSMs to ensure that value is constantly delivered to customers.

Actions:

- First interaction: New account setup
- Set customer expectations
- Discuss product use cases
- Training: Webinars, Tutorials, Help materials
- Provide technical support to customers
- Collect feedback on the initial customer satisfaction
- Regular check-in emails and calls

Pre-Renewal:

At this stage, it is important to ensure that all outstanding issues/tickets are resolved, as they may result in a negative experience and resistance to renew subscription.

Actions:

- Monitoring of positive behaviour
- Promote upsell and cross-sell of products
- Ensure high customer engagement
- High priority in terms of providing support

Account Renewal Checklist

- [ ] Send out a survey and collect customer feedback two week in advance
- [ ] Collate key information - value of the contract, number of licenses, names of key customer stakeholders
- [ ] Coordinate with support - Identify total number of support issues, open issues and status of open issues, and possible timeline for resolution.
- [ ] Identify & document key milestones that have been achieved in the last billing cycle.
- [ ] Identify pain-points experienced by customer during product usage, and prepare strategies for alleviation.
- [ ] Prepare a ROI statement to demonstrate benefits achieved in the time period
- [ ] Identify opportunities for upsell in consultation with the sales organization.

End of Year Customer Success Checklist

- ☐ **Conduct a review of the year**
  - ☐ Analysis of overall financial results (wins, revenues, profits)
  - ☐ Biggest successes - how was it achieved
  - ☐ Biggest losses - why did it happen
  - ☐ Changes in the market / competition
- ☐ **Get your customers prepared**
  - ☐ Goals & KPIs for the upcoming year
  - ☐ Major milestones anticipated
  - ☐ Any foreseen changes in their company
- ☐ **Plan for the next year**
  - ☐ Internal CS team milestones, goals & KPIs
  - ☐ Draft timeline / schedule
  - ☐ Strategies to be adopted for the year
- ☐ **Close the year with a personal touch**
  - ☐ Send a holiday greeting to your customers
  - ☐ Send a personalized message to thank them for the year

New CSM Checklist

- ☐ Set personal short-term goals
- ☐ Guide new CSMs on how to identify priorities
- ☐ Understand the company's value proposition

- ☐ Pick up the fundamentals
    - ☐ Learn the product
    - ☐ Develop some domain expertise
    - ☐ Enhance their customer relationship skills

- ☐ Get to know their peers
    - ☐ Study the organization structure / understand the roles & responsibilities of CS team peers
    - ☐ Familiarize with the key processes and handoffs

- ☐ Invite them to make suggestions / feedback from the perspective of a new user
- ☐ Master the product demo and training
- ☐ Familiarize with the key processes and handoffs
- ☐ Introduce and help them learn more about your customers

- ☐ Shadow key daily activities
    - ☐ Customer calls
    - ☐ Talk to product team on open issues and feature requests