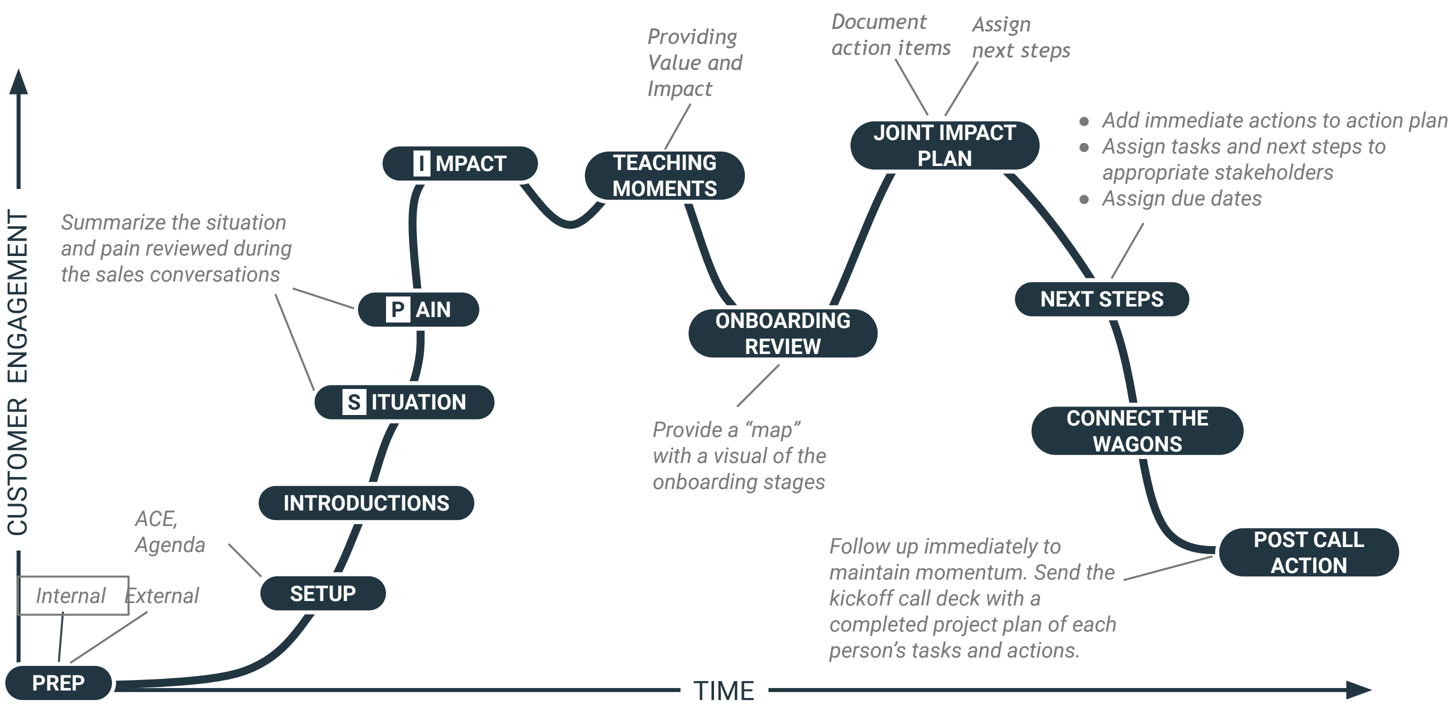
BLUEPRINT

Kickoff Call



Introduction

The kickoff call is a pivotal moment in the customer journey because it sets the tone for the post-sales stages of customer engagement. It's an opportunity for Customer Success professionals to set expectations, understand change management requirements, align with all key stakeholders, and start building a business relationship with your new customers.

This blueprint is a step-by-step guide to help you use the kickoff call to create an immediate impact for your customer. It covers the following:

1) How to prepare for a kickoff call
2) What to include in a kickoff call deck
3) Conducting kickoff calls effectively
4) Post-kickoff call actions

Preparing for the Kickoff Call

Internal Prep

- Review documented information and notes from Sales
- Conduct an internal kickoff with your team
- Prepare an agenda and kickoff call deck that will foster collaboration
- Begin building a project plan

External Prep

- Respond to introductions from Sales as soon as possible (within one business day)
- Schedule the kickoff call with the customer and send an invite immediately upon confirming a time:
  - Ensure all key stakeholders are invited to the call
  - Confirm that all key stakeholders will be attending the call
  - If they aren't attending, follow up with them directly and encourage them to attend
  - Include the agenda in the invite

TIP: *The Customer Success rep should be accountable for scheduling the kickoff call. It establishes credibility with the customer, allows Sales to focus on sales, and allows Customer Success to focus on the post-sales customer journey right from the start.*

TIP: *Use a Kickoff Call Deck as a way to facilitate the conversation. Do not make it the focus of the call or read from a series of slides. Use it as a medium to share information and teach. Create a resource that your customers will want to refer back to.*

Orchestrating the Kickoff Call

ACE & Agenda

Orchestrate the call, verify time, set the end goal, and engage:

A **Appreciate:** *Appreciate you taking the time*

C **Check time:** Ask each person attending, *Are we still good for 30 minutes?*

E **Verify the End goal:** *Typically at the end of this call, we agree on a plan to jointly achieve Business Impact...*

Ask: *Do you have anything else to add?*

- Confirm the agenda
- **Ask attendees:** *What else would you like to get out of this call?*
- **Involve everyone:** *How about you, Danny?*

Introductions

The introduction is a great opportunity for you to learn more about your customer and each stakeholder. During the introductions, ask every attendee to introduce themselves and explain their role in the company and this project/onboarding. You'll often gain valuable insight into each person's role and mindset for this project.

> **TIP:** *To make the most of the introductions, introduce yourself, and then orchestrate the introductions of the rest of the group: choose a specific person to introduce themselves, and then ask that person to choose the next person who should speak up to introduce themselves, and so on. This will eliminate awkward silences or people speaking over each other.*

Verify & Deepen SPICED

Summarize what you learned during the internal Sales < > Customer Success handoff using the **SPICED** framework…

Verify: *Did I get that right?*

Deepen: *Is there anything else you would like to achieve?*

Ask: *How do you define success?* (try to quantify the desired impact)

"Did I understand correctly that you…"

S	**Situation 1**	… currently have 250 employees
S	**Situation 2**	… and recently acquired a company with 50 employees
P	**Pain**	… and that you worry about high voluntary employee turnover
I	**Impact**	… and you'd like to reduce voluntary employee turnover by 30%
CE	**Critical Event**	… before the next performance review cycle in November
D	**Decision** *(criteria)*	… and that it's important to you that we have professional services

Teaching Your Customer and Providing Value

Look for opportunities to teach your customers about additional value that your solution can provide with the package and features they've already purchased (for example, if they purchased your solution to increase revenue but there are also ways they can leverage your solution to save time, highlight this). This helps to establish you as a trusted advisor who adds value and knowledge.

Do **not** confuse this with teaching your customers about new features or products that require an upsell. The kickoff call is too early to start positioning additional purchases. Ensure you are teaching valuable insights that are within the scope of their current purchase and/or based on industry knowledge and best practices.

Onboarding Overview

It's critical to set customers up for success from day one. Even if this is your 100th time going through the onboarding process, it's your customer's first.

Reduce confusion by providing your customers with an onboarding map. Provide an overview of the steps and stages, clear timelines, and what they should expect. Start with an easy-to-follow, high-level explanation, and then dive into details as needed afterward.

Joint Impact Plan

Align on an onboarding plan, action items, and next steps to create a smooth customer experience. This will also ensure you get the customer to First Value within their desired timeframe.

Introduce your customer to a joint onboarding and impact plan. This plan should:

1) Keep all stakeholders aligned on next steps.
2) Ensure all stakeholders are held accountable for their action items.
3) Deliver impact to the customer by getting them to first and full value as quickly and effectively as possible.

Next Steps

- Review any immediate action items that need to be completed and add them to the impact plan.
- Assign action items/tasks and next steps to specific stakeholders.
- Assign due dates.

Connect the Wagons

Agree on a cadence of progress meetings to ensure that the joint impact realization plan is followed. Schedule out a series of Impact Review meetings with the customer's management based on your onboarding timeline for achieving impact.

Post-Kickoff Call Actions

Don't lose momentum or the customer's motivation. Follow up immediately after the call with a recap, a copy of the kickoff call deck, and the completed project plan with individuals responsible for each task and action item.

> **TIP:** *Block 15 minutes on your calendar following kickoff calls so you can send the recap and a copy of the deck, while the conversation and information is still fresh in your mind.*

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Winning by Design

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Additional open source templates can be accessed at
www.thescienceofrevenue.com