

**Best Practices**

Orchestrating success for your customer. Remember, you are the expert!

- Share best practices of successful customers
- Share pitfalls of unsuccessful customers
- Provide a short list of action items
- Lay out immediate goals as well as longer term goals accompanied by specific timeframes (30 days, 90 day, 6 months, 9 months, 1 year)
- Collaborate and share a customer-facing document that lays out your 12-month impact plan

**How to prepare:**
- 1-2 relevant customer stories (of success and pitfalls) and best practices
- Impact plan populated with action items and customer goals that you're already aware of
**Impact Plan**

Build a 12-month plan based on what you know about other successful customers at the same stage.

Confirm the impacts on their business: ↑revenue, ↓cost, improve UX

### 12-MONTH IMPACT JOURNEY

<table>
<thead>
<tr>
<th>Customer Responsibility</th>
<th>TODAY</th>
<th>30 DAYS</th>
<th>60 DAYS</th>
<th>90-180 DAYS</th>
<th>6 MOS</th>
<th>9 MOS</th>
<th>1 YEAR</th>
</tr>
</thead>
<tbody>
<tr>
<td>Key Metrics</td>
<td>First Project Identified</td>
<td>25% Usage</td>
<td>70% Usage</td>
<td>70% Usage, 50% Usage</td>
<td></td>
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</tbody>
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### First Value

Define separate goals for the onboarding and ongoing phases. The onboarding phase officially ends with the customer achieving First Value.

**First Value Goal:** What does success look like at the end of onboarding? What is First Value?

**12-Month Goal:** What does success look like at the end of twelve months?

### Joint Impact Plan

Document a Joint Impact Plan (JIP) with your customer. Outline key milestones and impact metrics:

<table>
<thead>
<tr>
<th>GOAL</th>
<th>WHAT</th>
<th>WHO</th>
<th>WHEN</th>
<th>HOW</th>
</tr>
</thead>
<tbody>
<tr>
<td>Reach __% reduction in flaws</td>
<td>Within the Development team</td>
<td>Within 1 month of first scan</td>
<td>Drive users to self-serve educational resources and conduct monthly webinars to drive engagement</td>
<td></td>
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Revisit/ Swing Through

Redo the Joint Impact Plan every six months so that you have a fresh plan at the time of the renewal. It should plan past the renewal date to demonstrate how continuing to work with you will help the customer achieve their goals. It also sets you up for an auto-renewal (or at least an easier renewal discussion).

Goals

Prepare suggested goals that other customers have achieved.

Use specific goals when defining key metrics.

Individual Exercise

**STEP 1** Write down the name of one particularly successful customer and one unsuccessful customer.

**STEP 2** Think of at least three concrete things that each of these customers did differently.

**STEP 3** Think of one way to help your current customer take the same action as the successful customer.

**STEP 4** Think of one way to help your current customer avoid the pitfalls of the unsuccessful customer.
**Review**

Have the Joint Impact Plan ready and reviewed before each call. If at any point your customer strays from the plan or you think they are at risk, revisit the JIP to reset goals and redo discovery using the SPICED framework if necessary:

**SPICED**

- **Situation:** Reconfirm what your customer is trying to achieve.
- **Pain:** Reconfirm the problem you are helping them address.
- **Impact:** Reconfirm the impact on the business: ↑revenue, ↓cost, improve UX.
  - **Ask:** Are you still trying to achieve... (refer to impact in JIP)
  - **Ask:** What impact would it have if you were to meet that goal?
- **Critical Event:** What happens if you miss that date?
- **Decision:** Who else is affected by these goals?

**Recap**

Summarize the key takeaways from your meeting, update the Joint Impact Plan, and send it over to your POC and decision makers who might not have been on the call in order to gain buy-in for any changes.

- **Keep good notes to prepare you and your team for your next meeting**
Videos available on the WbD YouTube Channel

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