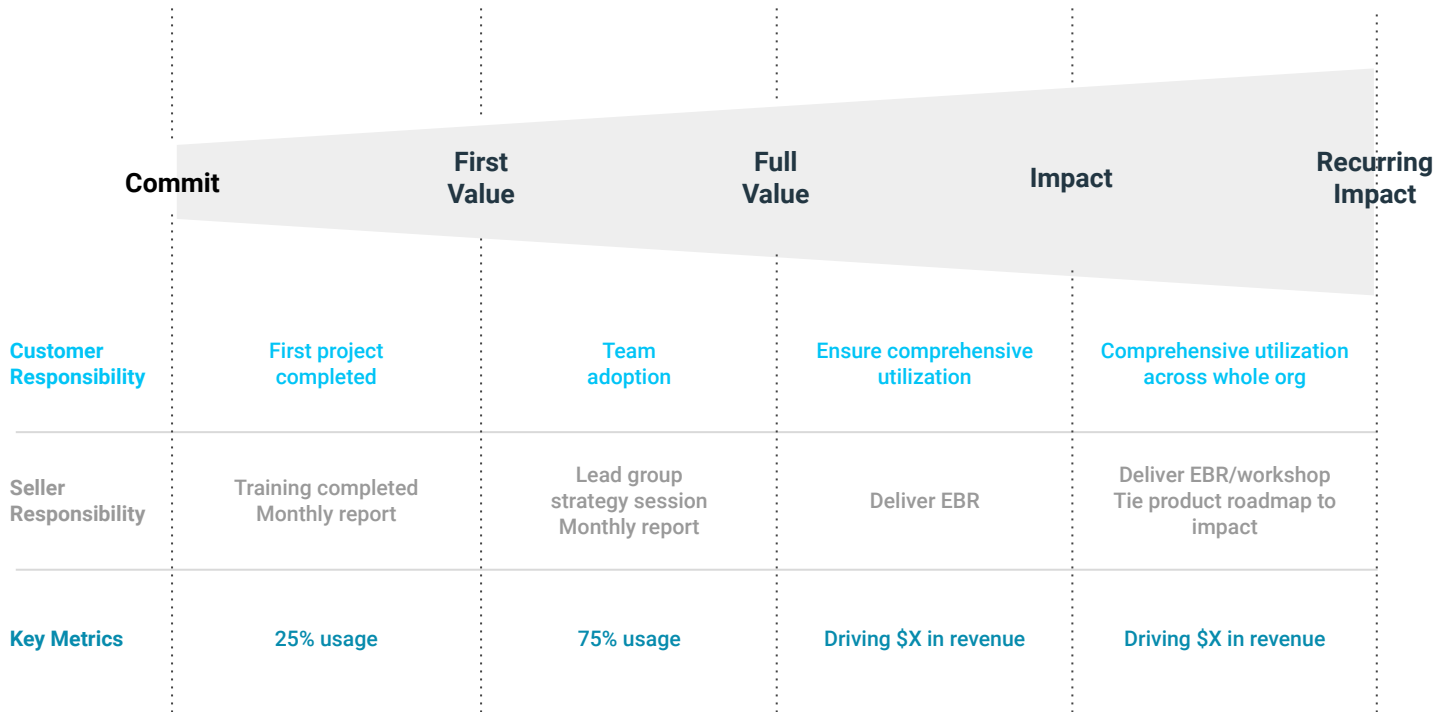


# Joint Impact Plan



## ▶ Best Practices

Orchestrate 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**

### How to prepare:

- Come prepared with suggestions of impact that they can achieve within a specific time period

### 12-MONTH IMPACT JOURNEY

	TODAY	30 DAYS	60 DAYS	90-180 DAYS	6 MOS	9 MOS	1 YEAR
Customer Responsibility	Project Lead Identified	First Project Completed	Project Lead Lunch 'n Learn				
Our Responsibility	Set Up Account, Schedule Training	Training Completed	Monthly Report	Monthly Report	Monthly Report, CSM Check-In Refresher/Advanced Training	Monthly Report, AM Check-In Impact Review Renewal	Monthly Report
Key Metrics	First Project Identified	25% Usage	70% Usage				70% Usage, 50% Usage

## ► 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

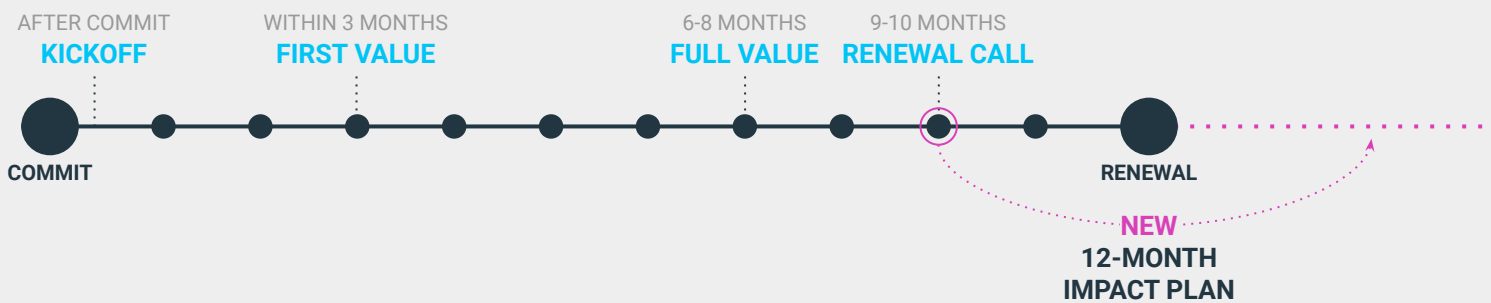
Document a Joint Impact Plan (JIP) with your customer. Outline key milestones and impact metrics:

	WHAT	WHO	WHEN	HOW
GOAL	Reach __% reduction in flaws	Within the Development team	Within 1 month of first scan	Drive users to self-serve educational resources and conduct monthly webinars to drive engagement

## ▶ 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).

### 12-MONTH IMPACT PLAN



## ▶ 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:



**S**ituation: Reconfirm what your customer is trying to achieve.

**P**ain: Reconfirm the problem you are helping them address.

**I**mpact: 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?*



**C**ritical **E**vent: *What happens if you miss that date?*



**D**ecision: *Who else is affected by these goals?*

## Recap

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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**

ADDITIONAL RESOURCES FROM



Videos available on  
[the WbD YouTube Channel](#)



Additional open source  
templates can be accessed at  
[www.thescienceofrevenue.com](http://www.thescienceofrevenue.com)