CUSTOMER SUCCESS OPERATING MODEL

PART 6. CORE SKILLS

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An initiative by:
Winning by Design

Introduction

IN

A Uniform Operating Model for a Recurring Revenue Businesses

The 3 Goals of the Operating Model for Recurring Revenue:

Goal 1. Establish a common, and customer centric, language.

Goal 2. Apply standardized metrics to allow for benchmarking.

Goal 3. Create Interoperability between different functions.

It is based on the following steps:

Step 1. Use of the bowtie to model the entire customer journey.

Step 2. Split up the customer journey in phases.

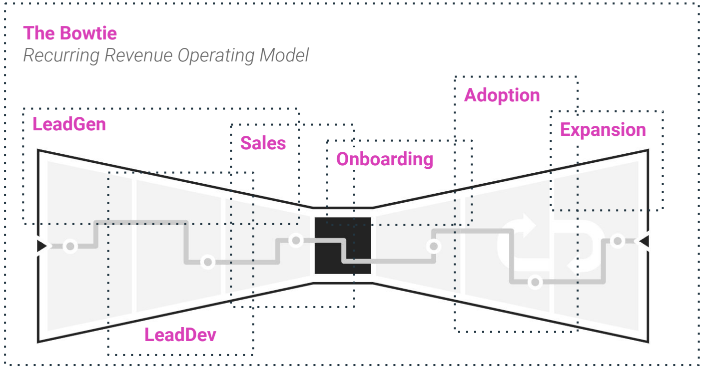
Step 3. Establish key metrics for each phase [M, CR, PM].

Step 4. Identify a handful of Moments that Matter per phase.

Step 5. Create a Blueprint for each of these moments.

Step 6. Codify SPICED into a Blueprint so it can be trained, improved, etc..

Step 7. Measure metrics [M, CR, PM] and improve over time



The key functions are:

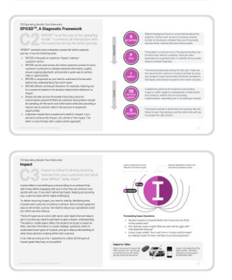
1. Lead Generation
2. Lead Development
3. Sales
4. Onboarding
5. Adoption
6. Expansion

Introduction

IN The 2023 Blueprint format explained.

The location of where you are at:

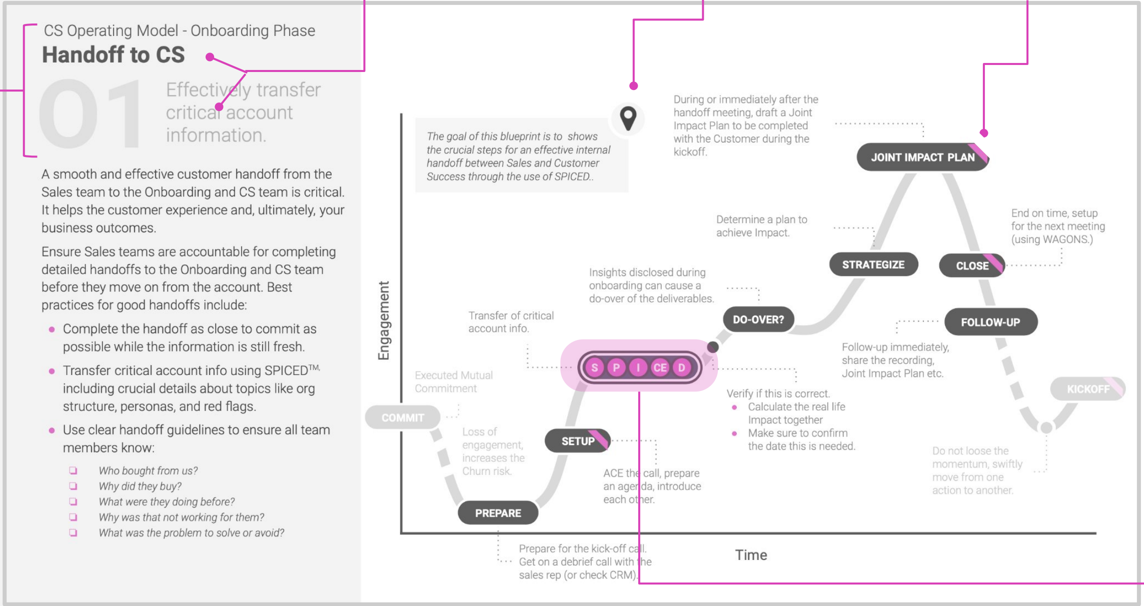
- *The CS Operating Model*
- *In the Onboarding Playbook*
- *Handoff to Customer Success*
- *Blueprint 01*
- *Large numbering allows you to navigate easily in the slide sorter.*



Clear description of the action and what it does. Handoff to CS is to Transfer critical account info

The goal of each blueprint is clearly stated upfront.

The banner provides a visual que to actions that are identified as a moment that matters.



Reference to the next action and blueprint in the customer journey.

Presence of SPICED, the framework which creates interoperability between blueprints.

Expertise broken down into a series of steps, actions, best practices etc.

Visual that guides you through the experience as a function of customer engagement over time.

Customer Success Operating Model

Core Skills

S0 The only way to achieve sustainable growth is through expansion from existing customers.

Developing and continuously improving your team's skills is essential to bringing your customer journey and the CS Operating Model to life. We encourage you to invest in ongoing skills training for your CS teams - you will reap the financial rewards of that investment many times over via improved customer outcomes.

In this section, we provide a sampling of WbD Skills blueprints that can be a reference for your teams.

The following blueprints include:

S1. Managing Meetings

S2. How to Diagnose

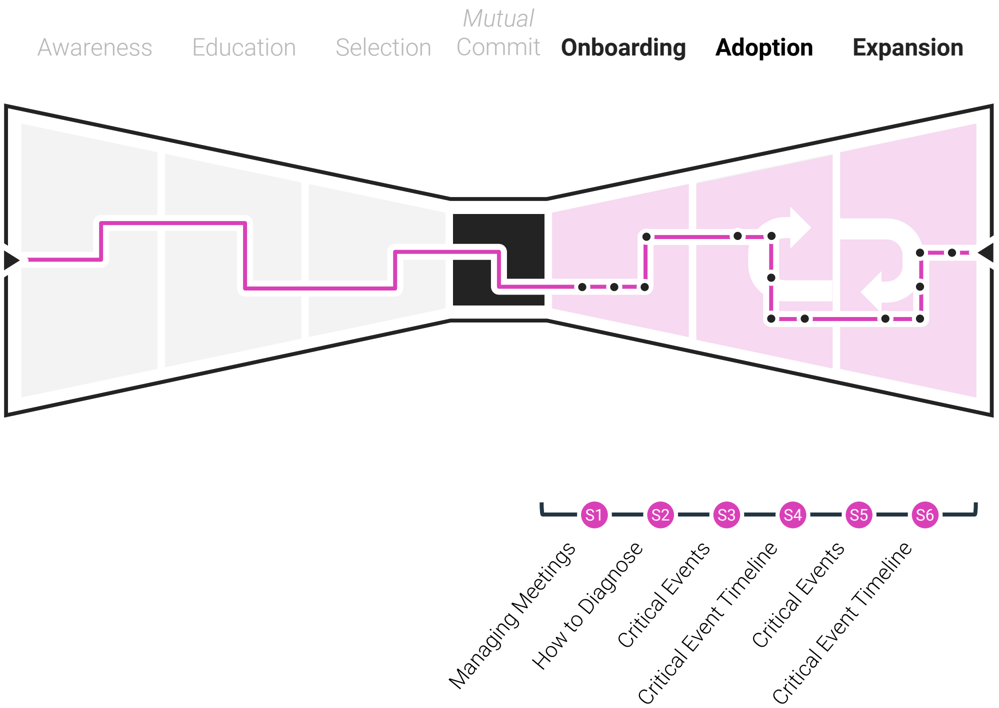
S3. Critical Event Blueprint

S4. Critical Event Timeline

S5. Navigating an Organization

S6. Share a Customer Story

You can find additional WbD skills blueprints and training videos in the Resources section of our website.



Customer Success Operating Model

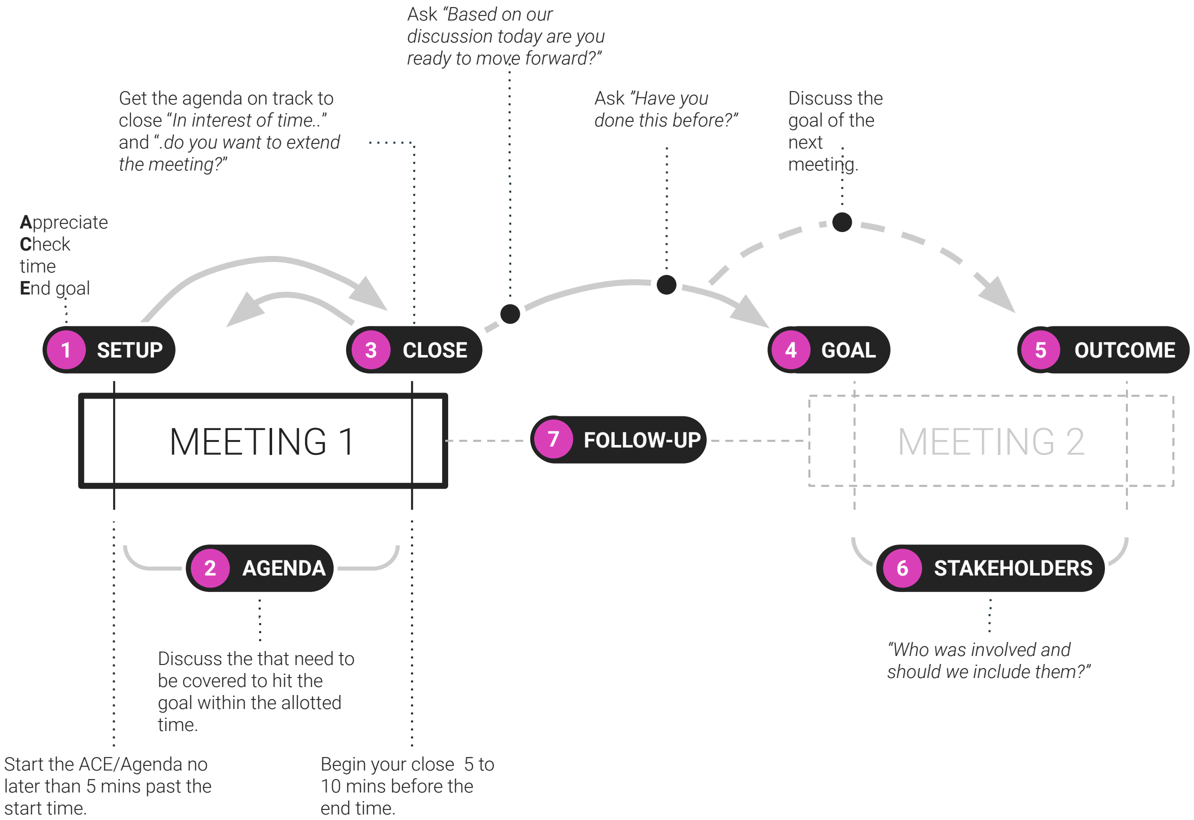
Managing Meetings

S1

The ability to achieve results via meetings is vital to your success.

Most business is conducted via meetings. This makes managing a meeting a critical skill to have. The steps to success are:

1. Setup the meeting at the start with the goal of the meeting and end-time.
2. Agree to a short agenda to achieve the goal and stick to it.
3. Close the meeting on-time to allow for next steps. Do this by first looking back to *see if set goals were accomplished.*
4. Then confirm if everyone is ready to move forward. Agree to what is next
5. Discuss *what* is the outcome of that meeting
6. Who should be in that meeting?
7. Agree if this can be done async, or if a synchronous meeting is needed
8. Follow-up diligently



Customer Success Operating Model

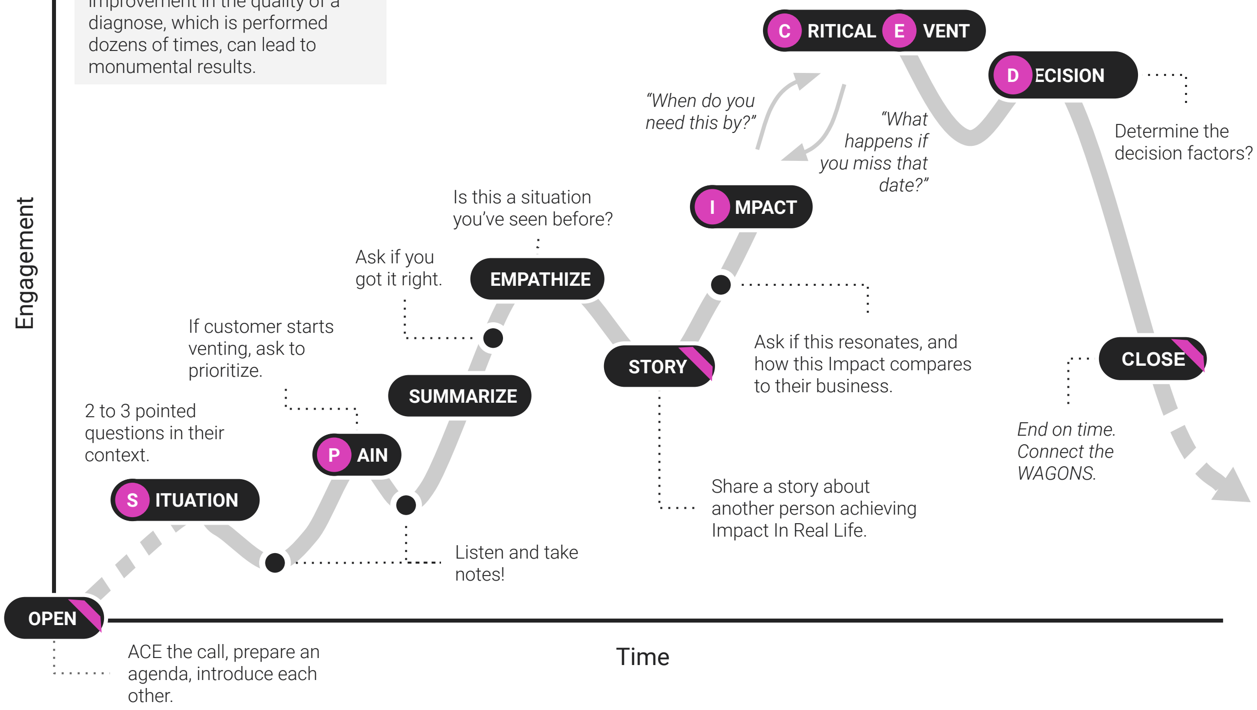
Diagnose Sequence

S2 A step-by-step guide on how to consistently diagnose a customer.

When and why to use SPICED™?

- As a diagnostic guide during customer calls.
- To ensure ongoing alignment with customers and your customer facing teams at every stage of engagement.
- To align customer usage of your product/solution with the Impact they are looking to achieve.
- As an efficient way to hand off, debrief, and collaborate with other team members throughout the customer journey (Sales, CS, Marketing, Product).
- A way to surface your customer's business updates or key changes that inevitably happen over time.

The goal of this blueprint is to provide insights how to perform a diagnostic call. A very minor improvement in the quality of a diagnose, which is performed dozens of times, can lead to monumental results.



Customer Success Operating Model

Critical Event Blueprint

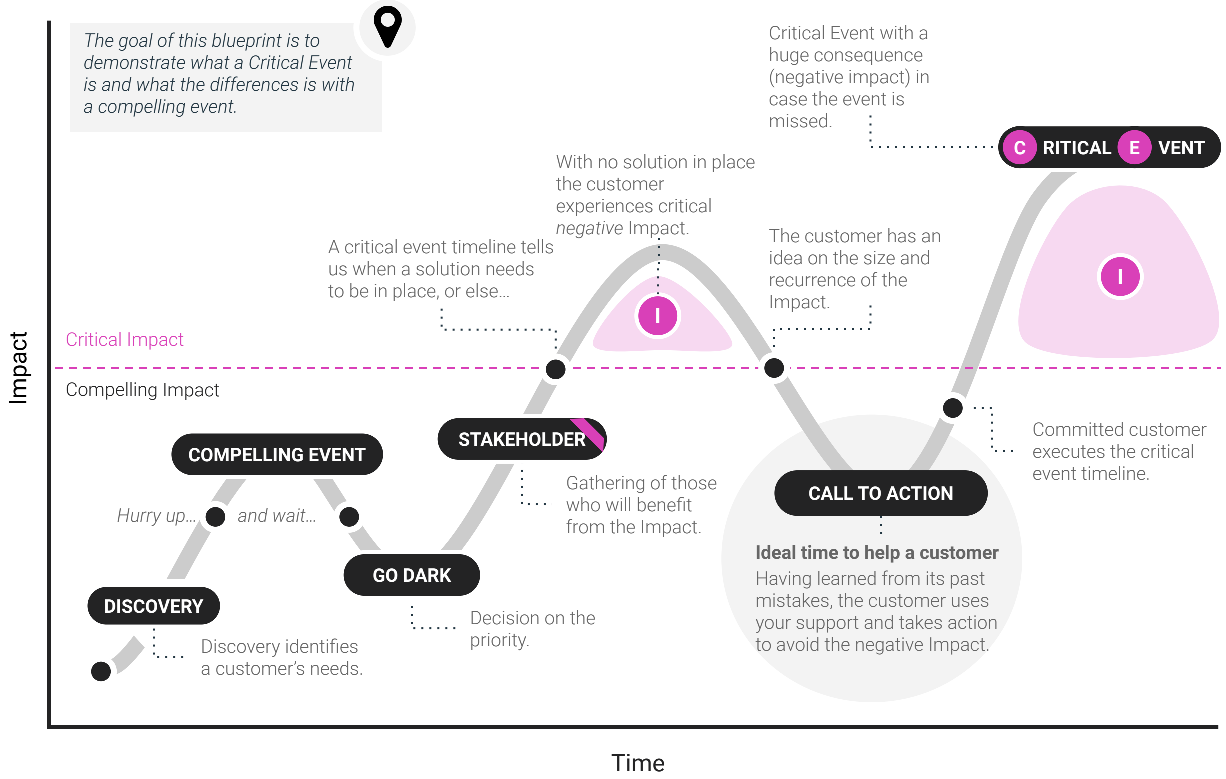
S3

A critical event carries a negative impact.

Key steps:

1. During the Onboarding call, EBR, etc. establish where the customer is:
   - Are they experiencing any pains?
   - Is this recurring?
   - What is your target go live date?
   - What happens if they miss that date?
2. Use examples of others in a similar position to establish a critical event.
3. Organize a stakeholder meeting. Stake-holders are those who gain from the Impact.
4. During the stakeholder meeting, present a critical event timeline of actions needed to deliver the Impact at the critical event date.
5. Deliver against the critical event date.

Note: Do not worry when a customer goes dark. Continue to educate on others and the IRL Impact they experienced.



Customer Success Operating Model

Critical Event Timeline

S4 The chronological actions needed to achieve the impact.

A critical event is like the end result of a recipe when cooking a meal. In order to achieve your desired outcome, the recipe tells you what to do and in what order.

This is the same with a critical event, following the identification of a critical event, you must uncover all the steps that need to happen.

Instead of determining when you need the P/O from the customer, you need to start with the customer's impact in mind. When does the customer need the desired impact and then work your way back. For example, if the customer has a sales kick-off on July 7, they need your new sales acceleration solution for their team in place by end of June.

A critical event message is a short, stand-alone email that solely talks about the critical event. This cannot be part of a two-page email with all kinds of actions. See the example next. Note the reverse chronological order of the message, a hallmark of customer centric selling.

CRITICAL EVENT

Step 1. Identify a Critical event

A critical event can be a date, or an event such as reaching 1M subscribers.

[Fill in]

Step 2. Establish what happens if they miss the event?

Critical event is impact as a function of time. You can recognize a critical event as it has a negative impact associated with it.

[Fill in]

Step 3. What are the steps that lead to this critical event (reverse chronological order)

The actions needed to deliver the impact at the set event date. reverse chronological order.

[Fill in]

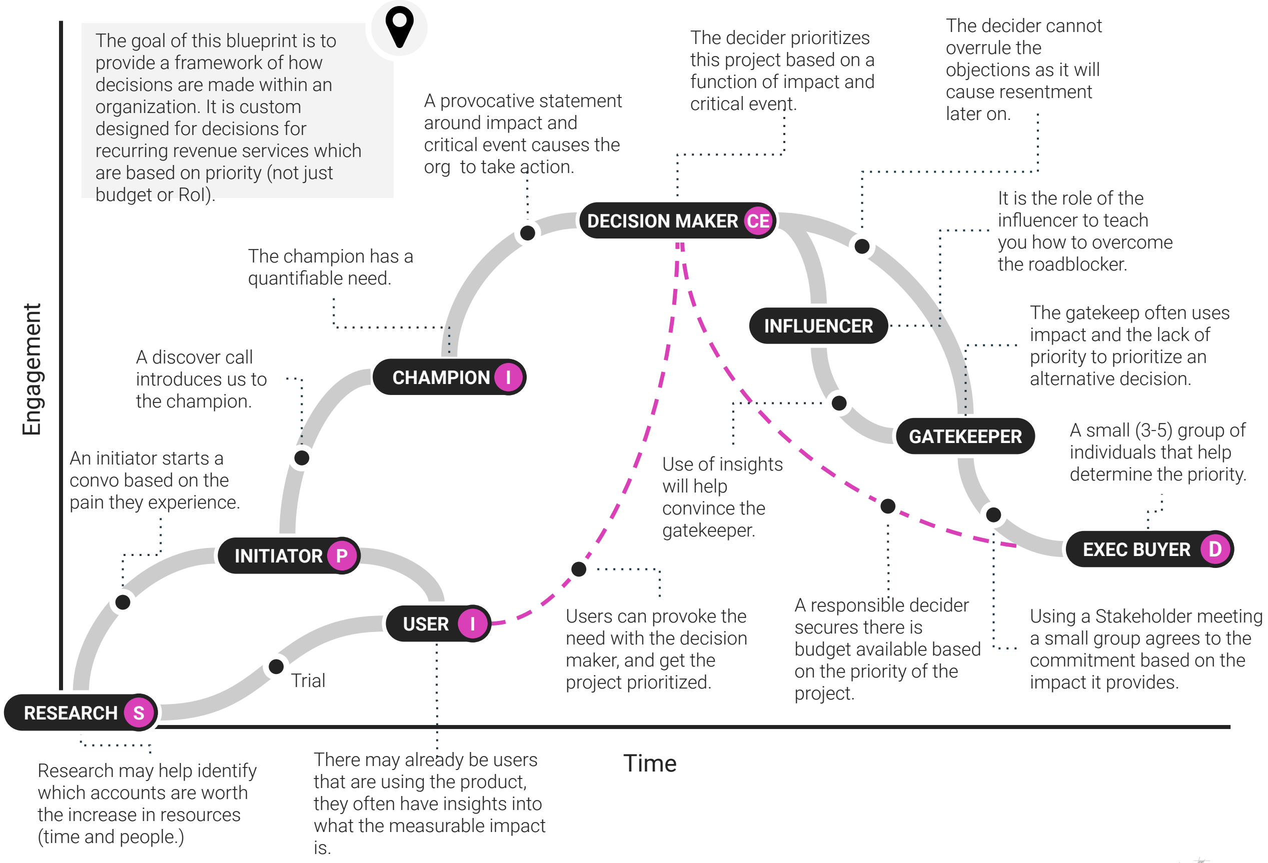
Customer Success Operating Model

Navigating an Organization

S5 Help your customer to sell internally based on facts and figures.

The people involved in a buying decision is what is called a buying center. When we look at the roles they play, we find the same roles to form a very similar decision process.

- *The Initiator* recognizes the situation & pain.
- *Users* often play a critical role as they provide practical insights into measurable Impact a product offers.
- *The Champion* recognizes the impact and helps identify a project with a critical event..
- *The Decider* makes the actual decision, typically based on a critical event (CE).
- *The Executive Buyer* is a often a small group of executives that makes the decision (D).
- *Gatekeepers* are those that oppose a decision based on emotional impact.
- *Influencers* help nullify the gatekeeper by providing educational insights.



Customer Success Operating Model

Share a Customer Story

S6

Share a relevant story that resonates with the customer's situation.

Every great story follows a well-defined framework. Explain the challenges your customer had, and describe the negative impact they experienced.

For this we are going to use a three-part story format in which you take your customer down the rollercoaster of emotions before describing the positive outcome.

Part 1. Situation, make it relevant to them.

Part 2. Pain, the [NEG] impact of not solving it.

Part 3. The positive impact of your solution.

The lows are intended to make the highs feel higher, and ultimately, they make the story more memorable.

When Marketing operates on the same model the story telling integrates with through Pocket Stores which are codified to match to this story telling format.