

OVERVIEW

2.0 Customer Success excellence

Customers have high expectations from their chosen vendors- they want an effortless experience. However, many CSMs approach relationships in the wrong way and actually make things harder for customers. The strongest CSMs are doing things differently.

CONTENT & OUTCOMES

In this module you will:

- Shift to the customer's perspective and learn what they need from the customer success experience
- Learn the biggest customer success mistakes and their impact on customer loyalty
- Explore research into what top CSM's are doing differently and how you measure up

Outcome: A deep understanding of what customers expect and demand from customer success professionals

2.1 Tailoring your conversation

The customer experience is the biggest driver of both loyalty and growth. Customers are far more likely to invest when they can see personal value so the strongest CSMs adapt their approach to their customer's personality and role. They look to connect both emotionally and rationally.

In this module you will:

- Learn how to speed read your customer's personality type to connect meaningfully and build rapport
- Understand specific customer types and what they need from you
- Learn how to dramatically increase customer engagement by talking their language

Outcome: Customers are more connected, engaged, and more able to take action from the conversation

2.2 Proactive problem solving

Customers are unique and often have complex problems that can make success difficult and quickly damage the relationship. The best CSMs proactively identify and resolve issues through creative thinking, research, and customer collaboration.

In this module you will:

- Learn a framework for identifying, understanding, and resolving issues
- Understand how to position advice in a way that is both memorable, engaging and drives customer action
- Explore how to collaboratively brainstorm solutions to customer challenges

Outcome: Customers that can easily move on from any challenging situation

2.3 Powerful proposals

For your customer, often the toughest part of buying a new or expanded solution starts when they must convince other stakeholders. With decisions under more scrutiny than ever, a water-tight business case that convinces the entire decision-making group is vital. The right proposal, created for the right people in the right way makes this simple and easy.

In this module you will:

- Take a deep dive into the journey of a proposal and exactly what your customer needs it to achieve
- Understand the impact of your current proposals and how that will affect conversion rates
- Create a unique and powerful structure for your proposals

Outcome: Higher quality upsell proposals which convince the wider decision-making group

2.4 Speeding up decisions

The decision-making group is growing and becoming more senior. This makes buying anything new and even renewing a deal, more complex and risky. The best CSMs work with their customers and help them navigate the process.

In this module you will:

- Understand the challenges customers face when selling internally and what they need to make this process seamless
- Come away with a toolkit for helping your customer pre-empt these challenges and partner with you to quickly convince internal stakeholders
- Identify how to drive quicker decisions around retention and growth

Outcome: Positive customer decisions more quickly