### Purpose

The purpose of the **Customer Success Roadmap** is to document in priority order **WHAT** customers want to do/do better, **WHY** it's valuable to them strategically, the obstacles standing in their way and products/services/action items required to help them overcome the obstacles to get their desired business outcomes.

## TABLE OF CONTENTS

[A. Strategic Value Themes 2](#_Toc103918876)

[B. Operational Priorities at-a-Glance 3](#_Toc103918877)

[C. Operational Priority Details & Action Items 4](#_Toc103918878)

# Strategic Value Themes

List 1-3 strategic goals for this plan. Refer to the Strategic Business Requirements Document.

|  |  |
| --- | --- |
|  | Customer Strategic Goals in Focus for [timeframe] |
|  | E.g., Keep employees more engaged with the mission of the organization. |
|  |  |
|  |  |

# Operational Priorities at-a-Glance

|  |  |  |
| --- | --- | --- |
| Priority | Top Operational Priorities | Strategic Goal Impacted Most |
|  | e.g., Conduct department-specific employee surveys 2X annually and follow up with action plans for addressing top concerns.  |  |
|  |  |  |
|  |  |  |
|  |  |  |
|  |  |  |

# Operational Priority Details & Action Items

|  |
| --- |
| Operational Priority 1 Name *e.g., Conduct employee surveys 2X annually that are department specific.* |
| IDEAL OUTCOMEDescribe the ideal outcome of executing this initiative successfully. *E.g., Employees stay with the organization longer because they feel like their voices are heard and their opinions are valued.* |
| OBSTACLES & WHY THEY EXISTDescribe the obstacles the make this difficult/impossible and **WHY** those obstacles exist!*Current surveys are one-size-fits-all and there’s no transparency on follow-up or action items.* |
| KEY ACTION ITEMS1. E.g., schedule additional training on Product X so that...
2. Schedule a demo of Product Y to…
 |
| IDEAL OUTCOME FOR YOUR ORGANIZATION |

|  |
| --- |
| Operational Priority 2 Name |
| IDEAL OUTCOMEDescribe the ideal outcome of executing this initiative successfully. |
| OBSTACLES & WHY THEY EXISTDescribe the obstacles the make this difficult/impossible and **WHY** those obstacles exist! |
| KEY ACTION ITEMS1. E.g., schedule additional training on Product X so that...
2. Schedule a demo of Product Y to…
 |
| IDEAL OUTCOME FOR YOUR ORGANIZATION |

|  |
| --- |
| Operational Priority 3 Name |
| IDEAL OUTCOMEDescribe the ideal outcome of executing this initiative successfully. |
| OBSTACLES & WHY THEY EXISTDescribe the obstacles the make this difficult/impossible and **WHY** those obstacles exist! |
| KEY ACTION ITEMS1. E.g., schedule additional training on Product X so that...
2. Schedule a demo of Product Y to…
 |
| IDEAL OUTCOME FOR YOUR ORGANIZATION |