### 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.

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# Strategic Value Themes

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

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

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| --- | --- | --- |
| 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. |  |
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# Operational Priority Details & Action Items

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| --- |
| Operational Priority 1 Name *e.g., Conduct employee surveys 2X annually that are department specific.* |
| IDEAL OUTCOME  Describe 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 EXIST  Describe 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 ITEMS   1. 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 OUTCOME  Describe the ideal outcome of executing this initiative successfully. |
| OBSTACLES & WHY THEY EXIST  Describe the obstacles the make this difficult/impossible and **WHY** those obstacles exist! |
| KEY ACTION ITEMS   1. E.g., schedule additional training on Product X so that... 2. Schedule a demo of Product Y to… |
| IDEAL OUTCOME FOR YOUR ORGANIZATION |

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| --- |
| Operational Priority 3 Name |
| IDEAL OUTCOME  Describe the ideal outcome of executing this initiative successfully. |
| OBSTACLES & WHY THEY EXIST  Describe the obstacles the make this difficult/impossible and **WHY** those obstacles exist! |
| KEY ACTION ITEMS   1. E.g., schedule additional training on Product X so that... 2. Schedule a demo of Product Y to… |
| IDEAL OUTCOME FOR YOUR ORGANIZATION |