



# The School of CUSTOMER SUCCESS



## CUSTOMER SUCCESS VALUE SKILLS

*On-Board, Nurture and Grow Account Success & Revenue*

### COURSE OVERVIEW

#### Transition Your Team From Tactical to Strategic

There's a reason your title changed from account manager to customer success manager. You're no longer limited to being the issue list manager for your accounts. In this course, you'll learn how to expand your role to be more of a strategic asset to your customers, take a stronger leadership role and help them get higher-value business outcomes from your products and services! That's why they'll keep renewing and buying more add-on products

- » *Live Virtual Classroom: Three Half-Day Sessions*
- » *Onsite: 1.5 Days*

### COURSE TAKEAWAYS



- » Uncover top-down strategic customer priorities.
- » Skills for facilitating strategic account planning meetings.
- » Create a customer success roadmap for each account.
- » Skills for positioning add-on products to grow account revenue.
- » Quality transitions from sales to on-boarding to nurturing.
- » Certification included.



# CUSTOMER SUCCESS VALUE SKILLS

## SESSION 1

4 Hours

*Introduction to Outcome-Based Customer Success Management*

**LESSON 1:** Facilitating the Transition Meeting From Sales

**LESSON 2:** Creating an Outcome-Based On-boarding Plan

**LESSON 3:** Facilitating a Post-Implementation Strategy Meeting

## SESSION 2

4 Hours

**LESSON 4:** Uncovering Top-Down Customer Priorities

**LESSON 5:** Creating Customer Roadmaps

## SESSION 3

4 Hours

**LESSON 6:** Positioning Add-on Products & Solutions

**LESSON 7:** Getting Started

# WHY WE'RE DIFFERENT

## Learn From a Specialist, Not a General Practitioner!



### PERSONALIZED TRAINING

#### Learn What Good Looks Like for You!

Experience hands-on, training that's personalized to your products and your markets. You'll learn how to apply unique B2B/B2B2C best practices to your own personalized case study. You won't have to "figure it out" after the training because we'll do it together in the classroom.



### OUTCOMES VS. PROBLEMS

#### Never Miss the Target for Strategic Value!

When everything is centered around customer business outcomes, their biggest problems find you. It's a clever shortcut that makes it easier for you to build, market, sell and deliver solutions with strategic value from the top down or bottom up.



### B2B SPECIALIZATION

#### Same Principles, Different Practices!

Uncovering and meeting market needs is universal. Unlike our competitors though, we've fine-tuned those principles to meet the specific needs of B2B/B2B2C organizations. You'll learn how to understand the customer organization from the top down, not just users. The result: you'll build, market, sell and deliver **solutions** (for users) that have guaranteed value all the way up the ladder to the C-suite.