



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: Facilitating Business Reviews

LESSON 8: 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.