



# The School of CUSTOMER SUCCESS



## CUSTOMER SUCCESS VALUE SKILLS

*Lead Customers Strategically vs. Reacting Tactically!*

### COURSE OVERVIEW

#### Personalized Training for Strategic Customer Success

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  
*WHAT customers expect to accomplish and WHY.*

**LESSON 2:** Creating an Outcome-Based On-boarding Plan  
*Exactly how our product will deliver the outcomes.*

**LESSON 3:** Facilitating a Post-Implementation Strategy Meeting  
*The first step to developing a strategic partnership.*

## SESSION 2

4 Hours

**LESSON 4:** Uncovering Top-Down Customer Priorities  
*Identifying where you can deliver more strategic value.*

**LESSON 5:** Creating Customer Roadmaps  
*Turn-by-turn directions for executing the strategic plan.*

## SESSION 3

4 Hours

**LESSON 6:** Positioning Add-on Products & Solutions  
*Relative to the customer's strategic goals & obstacles.*

**LESSON 7:** Facilitating Business Reviews  
*The account strategy is your jumping point.*

**LESSON 8:** Getting Started  
*The fastest way to get a few quick wins.*



[Request Personalized Training for Your Team](#)

*Live Online or Onsite*

# 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

#### It's The Definition of "Customer" That Changes Everything!

Unlike our competitors, we've fine-tuned traditional value principles to meet the specific needs of B2B/B2B2C organizations where you have to go far beyond the users. You'll learn how to understand the customer organization from the top down so you can build, market, sell and deliver **solutions** (for users) that have guaranteed value all the way up the ladder to the department heads and the C-suite.