

# 30 60 90 Day Plan



Customer Success Manager

# Outline

- 30, 60 & 90 Days Plan
    - Understand
      - Stakeholder
      - Product
      - Process
      - Customer
    - Analyse & Plan
    - Building a framework Model
    - Execute
-

# 30-60-90 Days Plan

## Understand

1. The Stakeholders
2. The Product
3. The Processes
4. The Customers

0-30 Days

## Plan & Analyse

1. Customer Sentiments
2. Customer Segmentation
3. Analyse the KPIs
4. Analyse Churn
5. Product RoadMap

30-60 Days

## eXecute

1. Set Targets
2. Refine the process
3. Monitor the O/P
4. Show results

60-90 Days

The  
UPA-X

# Understand

## Stakeholders

- **Management**
- **Customer Success team**
- **Onboarding Team**
- **Customers**
- **Product Managers**
- **Support Team**
- **Marketing Team**

## Product

- **What is the Product**
- **Why the Product was built**
- **What problems does the product solve**
- **What is the value the Product promises to customers**
- **How is the Product different from competition**

## Processes

- **Feedback (Team & Customer)**
- **Product (Plans & Pricing)**
- **Onboarding Process**
- **Renewal Process**
- **Upsell Process**

## Customers

- **Top Paying Customers**
- **Top Using Customers**
- **Not Using the Product Customers**
- **Customers Recently Churned**

# Understand

## Stakeholders

- **Management**
- **Customer Success team**
- **Onboarding Team**
- **Customers**
- **Product Managers**
- **Support Team**
- **Marketing Team**

Understand the managements' goal

Understand the CS team and challenges faced by them

Spend time with each stake holders and understand the problems they are facing

Listen to Customer Calls and sales Demos to get a better understanding of customer and product

Learn about various use cases the product is designed for

Thoroughly analyse the support tickets and understand the problems

# Understand

## Product

- **What is the Product**
- **Why the Product was built**
- **What problems does the product solve**
- **What is the value the Product promises to customers**
- **How is the Product different from competition**

Try the product yourself  
and get all your doubts  
cleared

# Understand

## Processes

- **Feedback (Team & Customer)**
- **Product (Plans & Pricing)**
- **Onboarding Process**
- **Renewal Process**
- **Upsell Process**

The team feedback should be 1 to 1+ and documented

The customer feedback using CSAT, & NPS and is documented

The different plans and Products

The onboarding should be timebound, Milestone based and focussed on increasing Product adoption

Create a Renewal and Upsell playbook

# Understand

## Customers

- **Top Paying Customers**
- **Top Using Customers**
- **Not Using the Product Customers**
- **Customers Recently Churned**

Top customers are the top 20% who are responsible for 80% of revenue

The top using customers are an important asset and we can learn a lot from them

The ones who are not using or under utilising the product will help us improve our processes/product

The churned customers are CSMS treasures, understanding why they churned will help in reducing churn



# Plan & Analyse 30-60 Days

**Analyse Customer Sentiments**

**Analyse how to segment customers in Company**

**Plan a Customer Engagement Strategy**

**Plan a Customer Success Strategy**

**Product Roadmap**

**Analyse the key metrics suitable for Company**

**Design an onboarding Framework**

**Define customer life cycle journey**

**Analyse past 90-180 days Churn**

**Setup Account Health Parameters**

**Set a SMART Target**

**Build a prediction Framework**

## Segmenting the Customers

ARPA

Pricing

Demographic

Industry

Use Cases

\*Segmenting by two factors will be more effective

## Customer Lifecycle Journey

Signup

Onboard

Renew

Upsell

Advocacy

## Define Onboarding Framework

Customer should get an early Value ASAP

Customer has to put in least effort to get that value

Customer should adopt the sticky features of Company to achieve his/her business goal

## The Engagement Strategy

- Emails, Automation Campaigns & Feedback Forms
- Phone Calls
- QBRs and 1 to 1 Meeting

## Analysing Recurring Revenue

What type of customer pay the highest

The average LTV of the customers

What is the average ARPA

What is the CAC

What % of customers upgrade

What is the average expansion revenue

## Analysing Past Churn

Bad fit? – Train Sales Team

Missing Functionality? – Check with Product Manager

Missing outcomes? – Check CS Processes

Didn't have understanding of the product?

# Building a Framework Model

To predict how customer will grow with us

Because of the unique pricing model of Company, the MRR is closely linked to the growth of the customer

Its Very difficult to predict how customer will grow with us, but using certain parameters we can forecast and estimate how the customer will grow with us

- Analysing a past customers with similar ARPA, Industry & Usecase
- The rate at which the License utilisation is increasing
- Performance of the Customer in the market among it's competitors

## KPIs to focus on during 1<sup>st</sup> quarter

TTV (Time to Value)

MRR Retention Rate (>100%)

Churn rate

- Account Churn
- Revenue Churn

CAC:LTV ratio

- $LTV \geq 3 * CAC$

NPS

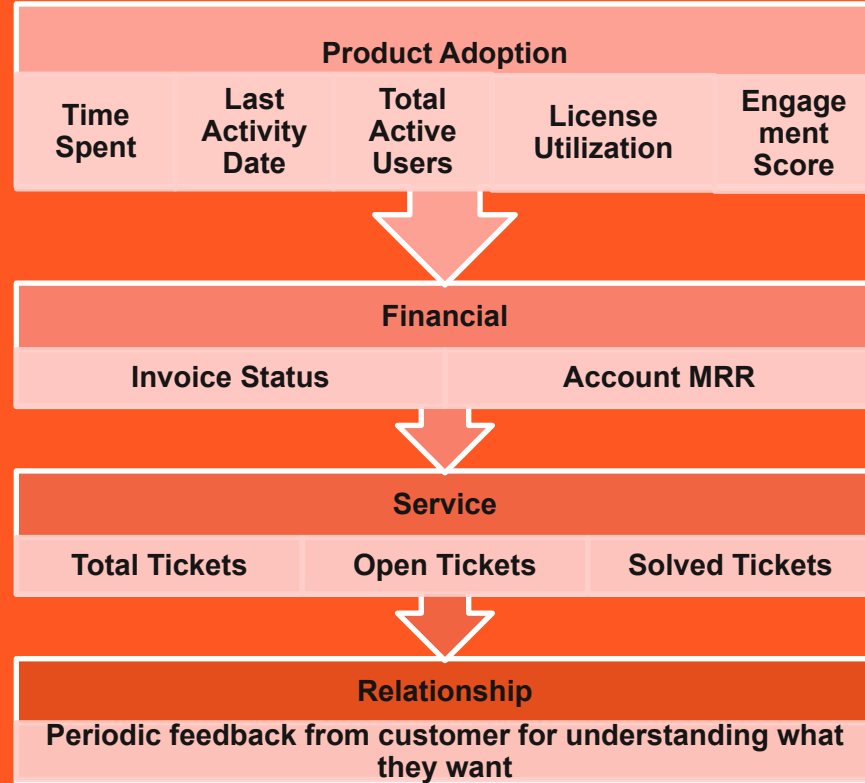
## Establish targets

Each member in the CS team on average manage \$2M worth of Revenue

- If ACV(Average Contract Value) is \$10k / Year then the CSM will handle 100-200 Clients
- If ACV(Average Contract Value) is \$100k / Year then the CSM will handle 10-20 Clients

Also Communicate to the team about the improvements in the key metrics to be achieved

## Define health Parameters



# eXecute

60-90 Days

**Refine the process**

**Report and Monitor  
Output**

**Show Results**

Choose an appropriate CS platform to track the performance

The parameters of Health are set as per the type of customers the CSM is handling

Train the team as and when necessary

Report the progress at regular intervals

Make any change to the process as and when necessary

**Thank You**