CS SNACK

Customer Success new hire onboarding plan

The Employee onboarding plan is designed for Customer Success leaders.The onboarding plan is divided into 4 main CS competencies and has tasks setup to turn new hires from newbies to thought leaders as smoothly and efficiently possible

Do you want to reduce your churn and increase your up- and cross-selling? Then learn more about our Customer Success programs at saas- collective.com.

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Collaborate & Communicate

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The CS team is one of the teams that is constantly collaborating with others such as Marketing, Sales and Support. One of the main skills of a great CSM is to know how to best collaborate and communicate. During the early days of new hire onboardings ensure they learn about their role as a CSM and what others teams expect of them.

Task to complete	Responsible	
Buddy system: Reduce the hurdle of asking questions by partnering up new hires to a buddy for the entirety of the onboarding process	.....	✔
Meet the teams: Intro presentations to introduce Marketing, Sales and Support. What each team focuses one and how each team collaborates with Customer Success.	.....	✔
Round robin: learn the tricks and the day-to-day of other departments by spending a full day with a senior of each team.	.....	✔
Case studies: Find out how key companies are successfully using the solution and what they have achieved with it	.....	
Mission and vision: Presentation by head of department to present current and future objectives of the organization	.....	✔

Be a product expert

To be able to onboard new customers, to support them in their day-to-day activities with the product and to help them optimize their usage a Customer Success Manager needs to be a product expert. Throughout their entire onboarding, plan for their trainings and enough learning materials.

30 Days: After 30 days a Customer Success Manager should be able to present their own product onboarding

Task to complete	Responsible	
Product training: Follow a product training just as any customer would when they first buy the solution (ex: product academy)	.....	✔
Onboarding expertise: Watch previous onboarding recordings of your colleagues from different companies (starting with the ones you are taking over if you can)	.....	✔
Best practices: Learn the best practices through support material customers receive when starting (ex: support pages)	.....	
Sales demo: Shadow a discovery call / sales demo to understand how they sell and what you will have to delivery	.....	
Mystery guest: Play the role of a customer and follow the onboarding journey. Watch one your senior colleagues training and provide feedback on how to improve	.....	✔

Understand & Problem Solve

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Customer Success Managers need to be able to listen to their customers, understand their problems and find strategic solutions that best support the customer's goal. A Customer Success Manager should be a thought leader in their field.

Task to complete	Responsible	
Solution brainstorm: brainstorm exercise with other Customer Success Managers. 'How can this feature best help Customer X'	.....	✔
A day with Support: Reading customer questions and finding solutions to get first hand knowledge of struggles customers face	.....	
Cheatsheets: Go over customer most asked questions, most common hurdles	.....	✔
Product call: New hire to shadow a call between a Product Owner and a customer (ex: product evaluation call)	.....	

Nurture & Grow

Customer Success Managers are responsible for customers along their entire journey. Knowing from the start how customers move from Discovery, Sales, Onboarding, Adoption and to Expansion will ensure they have the skills to renew and grow accounts.

60 Days: Customer Success Managers should know how to present all touchpoints with customers: Onboarding, QBR, Renewal

Task to complete	Responsible	
Role play: Role play key customer meetings such as QBR, Upsell conversations and Renewals	.....	✔
QBR & Renewals: Watch or shadow QBR presentations and Renewal calls from the most experienced CSM's	.....	✔
Customer Health Reporting: Analyse and create report for one Customer to plan how to grow the account	.....	✔
Journey mapping: Know the role of a Customer Success Manager at each phase of the customer journey	.....	
Success plan: Handover of accounts using Success plans from previous CSM to new CSM	.....	