



Success Plan Canvas

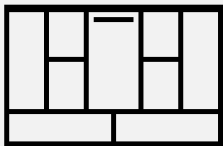
The Success Plan Canvas is a tool designed for Customer Success Managers. It facilitates the setup of a Joint Success Plan - the initial agreement between Sales, Customer Success, and your customer.

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.

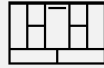
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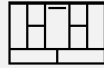


Client











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|---|--|--|---|---|
| <p>1 COMPANY HIGHLIGHTS</p> <p>Company details Short history, main products & services, industry trends, internal systems/tools used.</p> <p>Key Stakeholders Which internal/external persons, groups and decision makers should we take into account and are affecting our project. For complex products it makes sense to create a stakeholder map.</p> <p>Decisions makers: Budget owner: Project team: Who are the Influencers, Champions, and Detractors? User groups:</p> <p>Priorities</p> <p>Other highlights?</p> | <p>2 P.I.N.C. PROBLEMS • NEEDS • IMPACT • CONSTRAINTS</p> <p>Problems Which problems/challenges does this customer want to solve?</p> <p>Impact What is the impact of those problems on the customer's business?</p> <p>Needs Which needs does our customer have related to our product/service?</p> <p>Constraints Which constraints and challenges do we need to overcome or should we be aware of?</p> | <p>4 DESIRED OUTCOMES / EXPERIENCE</p> <p>What outcomes is the customer looking for? What kind of experience does the customer require to achieve this?</p> <p>How is our product/service helping our customer to achieve their outcomes?</p> | <p>5 SUCCESS CRITERIA & KPI</p> <p>How would success look like for this company? What are the criteria for that?</p> <p>Which success stories of other clients can you share here?</p> | <p>7 SUCCESS MILESTONES</p> <p>Which milestones and actions are defined on the road to success?</p> <p>For every action, add a due date and also a person accountable.</p>  |
| <p>COMMUNICATION & PROCESS</p> <p>Which agreements have been made about the communication & process. How do we work together in the most efficient / effective way possible?</p> | <p>3 PRODUCT & SERVICES</p> <p>Which products / services have been bought?</p> | <p>6 RISKS & OPPORTUNITIES</p> <p>Think about the threats & risks which could intervene with the success plan and endanger the relation and value of your product.</p> <p>Which up- and cross-sell potentials do you see?</p> |  | |
| <p>BEST PRACTICES</p> <p>REVIEW REGULARLY Your plan is a living document and should be updated based on new insights. Also review/walkthrough during every (Q)BR.</p> | <p>SHARE WITH CUSTOMER It's best if this canvas is openly shared with your customer, it will keep you sharp to do a proper problem discovery and provides a natural feedback loop.</p> | <p>DISCIPLINED EXECUTION Execution is the breakfast of champions. Without it, your plan stays a fantasy!</p> | <p>SHARE WITH CUSTOMER For most B2B companies, it makes most sense, if the sections marked with * are gathered and saved in your CRM by sales to be part of the handover to CS. CS needs to re-validate them during kick-off with clients.</p> | |

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