

# Customer success strategy template

Date [insert]

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## Customer success strategy for [insert Business Name]

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This is to outline the customer success strategy, [for information/ for approval].

The strategy is strategically solid because [insert reason] and financially sound based on [insert data].

The following teams have been involved and concur with this approach:

- [Team #1]
- [Team #2]
- [Team #3]

### Objective

[Write in one or two short sentences where you want to get to in words.]

### Goal(s)

[Write in one sentence where you want to get to in numbers.]

### Strategies

- Where to play

This is essentially the outcome of your segmentation analysis:

- which industry sectors to focus on,
- which products or services,
- which customer size or type.

It's helpful to also highlight what you are recommending NOT to focus on.

- How to win

Include here elements such as:

- the high touch/low touch approach by customer segment
- pricing strategy,
- renewals process,
- training for the customer and for the internal teams.

### **Measures**

[How will you track if you are moving in the right direction?]