

# Customer Success Strategy

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## Introduction

**Currently, the** problem at Sooperthemes is the lack of a customer success strategy.

Sooperthemes is somewhat of a SaaS business, so it's growth heavily relies on the recurring business of the current customer base. Originally, CSM had one goal of retaining customers but now it has become more 'proactive'. CSMs have to identify issues early enough for them to be fixed before customers churn. Just like many other business Sooperthemes is looking to integrate CSM so they can strengthen their relationships with their clients.

The mission statement of the CSM is: *"To build strong relationships, accelerate product adoption and to increase consistent proven value for both the Customers and Sooperthemes"*

# Situational Analysis

SWOT was chosen for the situational analysis because it gives an overview into the strengths and weakness but also the opportunities and threats. In Sooperthemes case it will be useful to see what CSM is currently doing and how it can be improved. In addition to this, it will also include CSM in general.

<b>S</b> Strengths	<b>W</b> Weaknesses	<b>O</b> Opportunities	<b>T</b> Threats
<ul style="list-style-type: none"><li>• CSM creates value for the clients and business</li><li>• With CSM there is growth and the possibility for expansion</li><li>• It creates retention</li><li>• It is the voice of the customer</li></ul>	<ul style="list-style-type: none"><li>• No separate department from customer support</li><li>• No automation or CSM Dashboard</li><li>• There is a lack of engagement from CSM and from the client side</li><li>• No reply-rate for emails</li><li>• Defining success with metrics can be difficult</li></ul>	<ul style="list-style-type: none"><li>• Creating a 90-day onboarding program will create retention and reduce churn</li><li>• Onboarding clients create value and will keep them longer</li><li>• Clarifying roles to customers</li></ul>	<ul style="list-style-type: none"><li>• Clients may stop using the product due to the lack of guiding and communication from CSM</li><li>• Other SaaS business already have processes for CSM</li><li>• Costs</li></ul>

## Analysis of SWOT

The strengths show that with customer success management Sooperthemes will create value for their clients but also for themselves. In addition to this, it shows that because csm wants to create value for the customer and to increase retention, they can be seen as the voice of the clients within the organization.

A weakness is the lack of automation, emails are sent manually which means the time is taken to write the emails when the time can be used to collect information on the clients. The weaknesses show that Sooperthemes CSM lacks a strategy or framework. Once there is a framework into place CSM will be able to engage with the clients more efficiently. Additionally, the team of CSM is small which means tasks will take longer to complete.

The opportunities show that with CSM Sooperthemes will be able to create retention amongst the clients but also reduce the churn rate which usually happens within the first 90 days of a client trying out a service. The opportunity of CSM is that Sooperthemes will be able to retain more of their clientele but to also be able to strengthen the relationship they have with their stakeholder.

This brings us to the threats. Sooperthemes is still a relatively young company. This means that costs have to be considered when thinking about what resources should be used such as how dynamic emails can be, if product tours are even a possibility and what CSM programs will be used to create a dashboard.

## External Communication Plan

### The audience

The audience that we will be focusing on are the clients of Sooperthemes. They are the most relevant stakeholder when it comes to the external communication for CSM. The demographic of the clients are quite varied. However, Sooperthemes mainly focuses on their american clients. The industries vary but many clients are in the Higher Education industry, Marketing, Government related and Web Designing/ Web development. But, in addition to this, Sooperthemes advertises their product as being easy to use for someone who does not have any prior knowledge of coding of web designing. This means that some clients seek guidance and education while others clients may already have prior knowledge and won't need as much guidance before they find value in the product. The aim of the communication is to create engagement but also to show the value of Sooperthemes to the clients.

### Objective

The objective is to increase customer retention while reducing the amount of churning happening in the first 90 days of a client purchasing the service. To also increase customer engagement with CSM.

### Strategy

The visual layout of how CSM communicate with clients has to be changed. As of now the emails are very plain. There is no Sooperthemes logo, no image of the CS manager, or a button for clients to press to plan a meetings. In addition to this, Sooperthemes lacks visual content for their tutorials. Although there are video instructions on many of the tutorials, the more difficult ones are just in text. As mentioned in the advisory report By Scarlet, she recommends that the documentation should also encompass content that is

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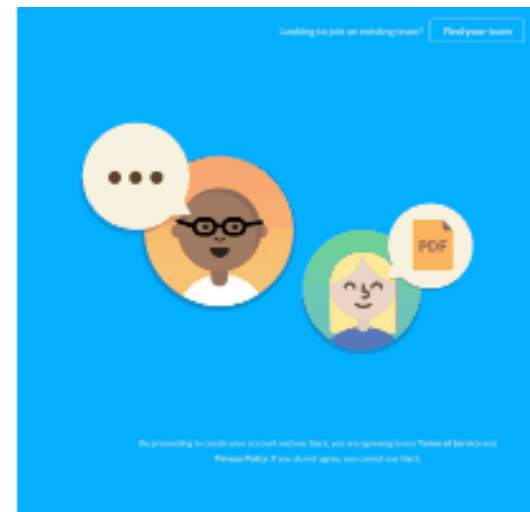
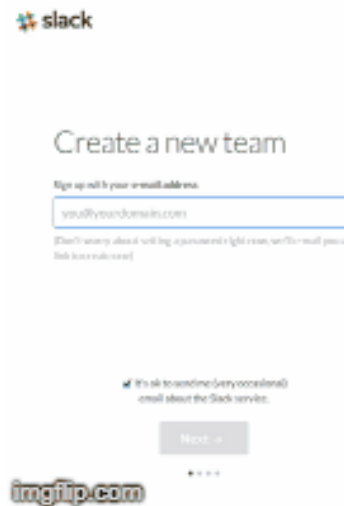
related to Drupal sites in general such as tips and tricks.

The example on the right shows the Sooperthemes logo, relevant links but it also has the option to book a meeting. (phone number not relevant)

## Looking at Slack

When looking at other companies, for example Slack, a popular team messaging platform. The company uses a series of modals and tooltips to explain how to use the platform and how to personalize it to fit anyone's team.

They start off with a simple welcome message, then walk users through 3 actions: creating a channel, posting a message and uploading a document. Each action is paired with a tooltip that shows users exactly what to do and where to do it in a few sentences which can be seen in the images of the appendix.



Sooperthemes should approach onboarding similarly. However, since Sooperthemes is not a chatting platform the way they should approach it will be differently. What we can take away from this is that more visual elements have to be added. There are already some videos, but other visual content such as gifs, or adding infographic style content to emails will make it easier for the clients to onboard since one learns faster accompanied with visuals.

## Product Tour Email

### Communication Mediums

1. Email
2. Blog
3. Newsletter
4. Video

Although there are currently many mediums Sooperthemes can communicate through. The most relevant ones for CSM and external communication would be e-mails, newsletters and the blog. Through emails CSM will be able to send out surveys, ask for feedback plan meetings and communicate with the clients. In addition to this, blog posts which are sent to the emails of the clients via newsletter will also communicate to client on current trends, topics, possibly what Sooperthemes has in stored for the future. This was Sooperthemes includes the clients in their journey and what they see for themselves and the clients in the future. Another medium of communication could be “face-to-face” in video calls where CSM will have one-on-one review sessions with the clients.

## Customer Success Strategy

The strategy will be to create a 90 day onboarding framework that will outline the tasks the CSM will do for the next 3 months. The strategy is based on research but also creating a SWOT analysis. The strategy will keep in mind that most processes related to CSM are not automated yet and its aim is to create an onboarding program that will reduce churn and to increase retention. The framework will explain the steps to be taken, what resources will be used and what value can be taken from the tasks and activities.

This type of framework was chosen because, it gives an overview of what has to be done and lays it out in an organized manner so the strategy can be followed. Based on research the first 30 days are all about collecting data, beginning the process of engagement and to educate the new clients on the features and products. Task such as:

- Collecting data with the given metrics on the clients will allow the CSM to get a further understanding
- Engaging with the client via email to ask them about their difficulties or if they are facing any
- Segmenting the clients into the buckets
- Send automated messages and product tour emails

These types of tasks will give the CSM an overview of what type of clients there are, what they are struggling with and what Sooperthemes can do to help them achieve their goals. The information and Data collected will then be used in the next part of the Onboarding strategy. At the end of the 30 days clients will be asked to give feedback via email or an email survey.

The survey will be relatively short to encourage clients to fill it out. There will be around 7 questions:

1. On scale from 1-10, how likely are they to recommend Sooperthemes to a friend or colleague?” (scale)
2. Does the product help you achieve your goals? **(yes/no)**
3. In your own words, describe briefly how you feel about Sooperthemes? **(open text)**
4. On a scale from 1 to 10, how do you currently feel about our customer support service and customer success?
5. Which features are most valuable to you? **(scale)**

6. How can we improve your experience with Sooperthemes? **(open text)**
7. In the future would you be willing to take this survey again? **(yes now)**

During 31-61 days, the data collected will be used to create a customer journey map and an Ideal customer profile. Also during this time, there will still be communication between the CSM and the clients with check-in emails. After the 60 days, clients will be asked for more feedback. During the next 30 days is when the plan of action is put into place. A customer journey will be created and the customer lifecycle in order to know how to communicate with the client but also to see on what part of the journey they are on so the subjects of the emails can be chosen depending on what part of the journey the client is. The strategy will also include a plan for external communication to specific in the terms of how the customers should be spoken to and what they may want, in addition to this the layout and visual content will also .

The last 30 days is when scaling happens. During this time the tasks will include creating KPI's that can be used to measure the success of the Customer Success Manager. In addition to this, a report similar to an MRR report will be made. But since Sooperthemes does not operate on a monthly basis, it will rather be a yearly. Next, a platform will be chosen where a dashboard can be created that allows the CSM to see keymetrics which indicate progress. The CSM program will be then implemented and finally clients will be asked to give feedback again via the email survey to see how the 90 day onboarding program went.

# Onboarding Framework

- Full Onboarding Framework is on the Google Sheets file that has been shared.
- Email template is on CSM Email Template document.

Sooperthemes Customer Onboarding Framework						
Onboarding Goals			Key Value Moments			
Onboarding Goals (1-30 Days)	Data Collection/ Engagement & Education: Understanding the customer		Value Delivered 1	Data collection allows for more personalized CSM approach		
			Value Delivered 2	User is able to used Sooperthemes products		
Onboarding Goals (31-60 Days)	Setting a Success Benchmark, creating engagement model, identifying upsells		Value Delivered 3	Opportunities are identifiable		
			Value Delivered 4	A success Benchmark as been set up		
Onboarding Goals (61-90 Days)	Scaling: KPI's for CSM, Reports, selecting platforms		Value Delivered 5	CSI team can be evaluated on their success		
			Value Delivered 6	Metrics are measurable		
Team	Customer Success Manger					
Onboarding time	90 days					
Customer Onboarding Journey: Data Collection, Engagement & Education (1-30 Days)						
Onboarding Steps	Timeline	Success managers tasks	Customer tasks	Product Adoption	Value (Health)	Resources
Step 1	Day 1	Collect Customer Data Segment				
Step 2	Day 1	Welcome Email (automated)				Videos, Infographics orther visual methods that can be used for touring Email template
Step 3	Day 1					
Step 4	Day 2	Product tour Email				
		Check-in on new Customers ( do they need help? What are they struggling with)	Customer replies expressing their struggles	Send custom training material like pdf's of videos		Videos, pdfs and documentation related to the product that can be used to educate the client
Step 5	Day 4	How to slove the problem with appropriate tools	Customer uses correct features to solve their problem	Customer uses specific feature to solve their problem	Customer has found feature that suites their needs and goals	Tutorial documentation, videos
Step 6	Day 5-6	Sending custom training material				Videos, documentation related to the product that can be used for education
Step 7	Day 7	Collect Data from metrics (login frequency etc)				
Step 8	Day 7-9	Talk to customers who are willing on their challenges and difficulties	Consumer expresses their challenges and difficulties			A simple spread sheet with basic information
Step 9	Day 9-10	Map customer journey				Templae of customer journey
Step 10	Day 10 - 11	Identify Upsell & expansion Opportunities			Data collected allowss for expansion oportunities	
Step 11	Day 12	Communicate: relevant best practices, how to optimize configurations and workflows		Clients are able to use the products to reach their goals	Clients use product successfully	Data from successful clients, surveys
Step 12	Day 15	Identify potential case studies				
Step 13	Day 16 -17	Ideal Customer and use profile				Template of idea consumer and case profile
Step 14	Day 17 - 18	Creating content based on customers difficulties & goals/objectives				Blog posts, tutorials any additional documentation
Step 15	Day 18 - 20	Check-in Email				Template of emails
Step 16	Day 25	Feedback	Customers answer survey		Feedback is used to improve CSM processes	Survey template with set of question using Survey Monkey
Step 17	Day 30					
Setting a Success Benchmark, creating engagement model, identifying upsells (31-60 days)						
Onboarding Steps	Timeline	Success managers tasks	Customer tasks	Product Adoption	Value (Health)	Resources
Step 1	Day 31 -32	Mapping out customer Lifecycle journey				Customer lifecycle journey template
Step 2	Day 33	Find clients who need further education	Client accepts help to be further educated	Client can use the feature/product succesfully		Tutorials, documentation, videos
Step 3	Day 34-35	Connect succesful customer characteristics to data				
Step 4	Day 35 - 37	Create Engagement model		Clients are using the product and are able to give feedback		Engagement model
Step 5	Day 37 - 38	Identify expansion/upsell	Clients accept expansion/upsell			Client Data
Step 6	Day 39- 41	Send emails such as stories or successes				Success stories email templates
Step 7	Day 50	Check-in emails				Email Template
Step 8	Day 55- 60	Feedback			Feedback used to make future improvements	Email template or Survey Monkey
Setting a Success Benchmark, creating engagement model, identifying upsells (31-60 days)						
Onboarding Steps	Timeline	Success managers tasks	Customer tasks	Product Adoption (Milestones)	Value (Health)	Resources
Step 1	Day 61	Create KPI's for CSM	Enter customer tasks here..	CS team uses KPI's	CS teams success can be	
Step 2	Day 62-65	Create MRR report			gives insight into why cients	Data from customers
Step 3	Day 66	Select a platform			Dashboard allows for progress to be measured	Data Collected
Step 4	Day 66-68	Create a dashboard that can highlight key metrics		CSM uses Dashboard for metrics		Data collected from clients and chosen metrics
Step 5	Day 69	Check-in Email				
Step 6	Day 90	Feedback	Customer gives feedback		Feedback allows for future improvements	Survey, Email template

# Evaluation

The success of the strategy will be evaluated with the KPI's that will be chosen in the last month of the onboarding journey.

Different types of metrics for churning should be used:

- Customer Churn
- MRR Churn
- Net MRR Churn

In addition to this, the customer success strategy should be evaluated using other metrics such as the Customer Satisfaction. This is the NPS that will be measured via the data gathered from the surveys as well as the scoring from emails. Lastly, another metric related to customer satisfaction should be measured and that is the Customer Satisfaction Score (CSAT)

## Churning

We want to be able to measure the percentage of churn because it will show us customers who have quit our product in a given time. This mainly counts for the customer churn rate.

Additionally, when delving deeper, there are different types of churns that we should be measuring. Since one of the main objectives of CSM is to reduce churning it is important that we are able to see where we are successful and if the churning rate data can be applied to improve the current strategy.

## Expansion Revenue

Next we should be using Expansion revenue as a form of evaluation. This is the percentage of the new revenue which comes from existing customers. This metric is used for measuring retention. Expansion revenue is a good measure of how good we are at getting customers to *grow* with our products. This can come for example from clients upgrading from Basic to Professional.

## Customer Satisfaction (NPS + CSAT)

Next we should look use customer satisfaction as a metric to evaluate our success. Using the Net Promoter Score will be able to know how the customers are *feeling*. This will be done through the survey will send out after every 30 days. By using a scale of 1-10, with 1 meaning a customer is very unhappy or will not recommend the product and 10 meaning they are satisfied and are very likely to recommend the product to a colleague or phone. This will allow us to find any disparity.

The Customer satisfaction score (csat) should also be measured along NPS. It is useful because it is a metric that looks at the short-term happiness.



Relevant links:

Google excel sheet:

[https://docs.google.com/document/d/1o7\\_34Q9M8nO4XwSNgKYxaMbsyqFrAgX8KT8Ux8Y-J6w/edit](https://docs.google.com/document/d/1o7_34Q9M8nO4XwSNgKYxaMbsyqFrAgX8KT8Ux8Y-J6w/edit)

Email Template:

[https://docs.google.com/document/d/1o7\\_34Q9M8nO4XwSNgKYxaMbsyqFrAgX8KT8Ux8Y-J6w/edit](https://docs.google.com/document/d/1o7_34Q9M8nO4XwSNgKYxaMbsyqFrAgX8KT8Ux8Y-J6w/edit)