Success Plans: The Untapped Pipeline To Customer Stories

**If Done Right*

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How do I know?

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- In B2B SaaS for nearly 10 years
- Previously a Customer Success Manager and a Customer Marketing Manager
- Currently: Founder & CEO at The Customer Success Project

Work featured in

WOMEN IN CUSTOMER SUCCESS

BUSINESS INSIDER

Forbes

Catalyst

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What even is a success plan?

Let's define it...

*A **Success Plan** is a mutually agreed upon project plan between the Customer Success (CS) team and the client which lays out the plan they'll follow to **achieve the value** the client was after when purchasing the product/service.*

How does it work

IMPLEMENTATION

Customer Success team aligns with Sales on the client objectives to create the foundation of the success plan.

ADOPTION & ADVOCACY

The success plan shows up throughout:

- Check-in calls
- EBRs
- Ad hoc calls
- New stakeholder introductions

RISK MITIGATION

When there's risk, success plans can morph into save plans (not ideal but it's our reality).

They can also surface any issues that could potentially lead to churn early on in the partnership.

COMMERCIALS

Success plans are a repository of what has been accomplished and what's the plan going forward with a client which aids in commercial activities such as renewals and upsells.

Why are they important?

Alignment setter

Expectation enforcer

Paper trail

Insights gold mine

Basically, they help CS teams get sh*t done

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There's something YOU should know

Success plans have an ugly side.

- They are incredibly time consuming
- They majority are fruitless for many reasons such as:
    - They were never mutual plans to begin with
    - It's hard to get buy-in (that's why it's important to set the stage during the sales cycle)
    - They're a one-hit-wonder. Built once and then found its way in the Google Docs graveyard
    - This is a strategic tool for CSMs–If the CS team is in firefighting mode, it's hard to focus on being "strategic"

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What’s in it for YOU?

Here’s what a success plan looks like

Business Priority	Team's Objective	Strategy	Owner	Priority	Status	Target Due Date
What is the customer's business/company priority that relates to what they're trying to achieve with your tool/service and this specific objective(s)	*What does this team/department have to do to achieve the business priority? What are their plans/objectives?*	*What specific things do they have to do with your tool/service in order to achieve their team's objectives?*	*Who is responsible for completing this? Be specific (use direct names) The RACI model can be helpful here*	*What is the priority of this specific task/strategy/objective? Low, Medium, High, Critical*	*Where are we with this objective/task/strategy? Not started, In Progress, Blocked, Completed*	*When do we want to get this done by?*
Achieve NRR of 130%	Set Up an at-risk prevention process to reduce churn by 3%	Do an analysis of previously churned accounts and identify top 3 churn reasons	Customer, Peter	Critical	In progress	
		Create triggers related to identified churn reasons and an associate playbook for each	Customer, Stephanie	High	Not started	
		Setup a churn dashboard	[YOUR COMPANY], Cecily	Medium	Not started	
	Add new product line as an upsell lever to generate 10% increase in NRR by end of Q4	Strategy 1	Owner			
		Strategy 2	Owner			

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This is the gold mine I mentioned earlier

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Your company
FEATURED CUSTOMER CASE STUDY
HOW COMPANY REDUCED CHURN BY 3% USING A DASHBOARD AND ONE PLAYBOOK
TAP FOR MORE


Your company
FEATURED CUSTOMER CASE STUDY
HOW COMPANY INCREASED NRR BY 10% IN ONE QUARTER USING THIS UPSELL PLAY
TAP FOR MORE

★★★★★

"Acme CRM turned our customer retention game around! Our churn rate dropped by 3%, and the best part is, it felt effortless. The system is so intuitive that our team seamlessly integrated it into our workflow. Thanks to Acme, we're not just keeping customers; we're building lasting relationships!"

Sarah M. from Apples

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BUT WAIT…

THERE'S MORE

Leveraging success plans also helps you:

1. Actually get to the elusive cross-functional dream land.
   a. This is an opportunity to work closely with customer success
   b. Enable the sales team with customer-backed content
   c. Share it with the rest of the marketing team (hi, demand gen)
2. Understand the product more.
   a. Hold your own on those product-focused calls
   b. Advocate for the customer in unison–The ultimate GTM alliance
   c. Find your next CAB member that can contribute to the group in a greater way
3. Work with data in your corner.
   a. No more fluffy content, have stats on stats on stats
   b. Host events, promote and create projects that you know gets results
4. Gather a variety of stories
   a. Success plans cover the entire customer journey, not just onboarding
   b. You’ll find stories for specific use cases, company sizes, fields, etc.

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How do we make that happen?

Step 1: Does your CS team do success plans?

This all starts with CS!

It’s time to slide in your CS team leads DM.

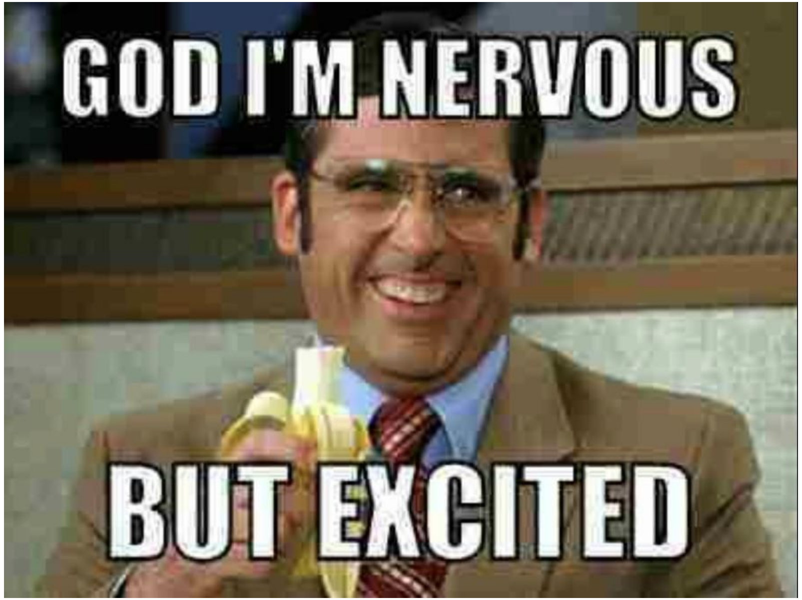
“Hey, by any chance, does our CS team do success plans with clients?”

Step 2: More importantly, is it working?

If the answer is yes, celebrate just a little.

The next question should be:

“Are we achieving results with our success plan process? Do our customers engage with the plan?”



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Step 3: Now it's time to make the ask

If the process is in good standing, it's time to take a look at some success plans.

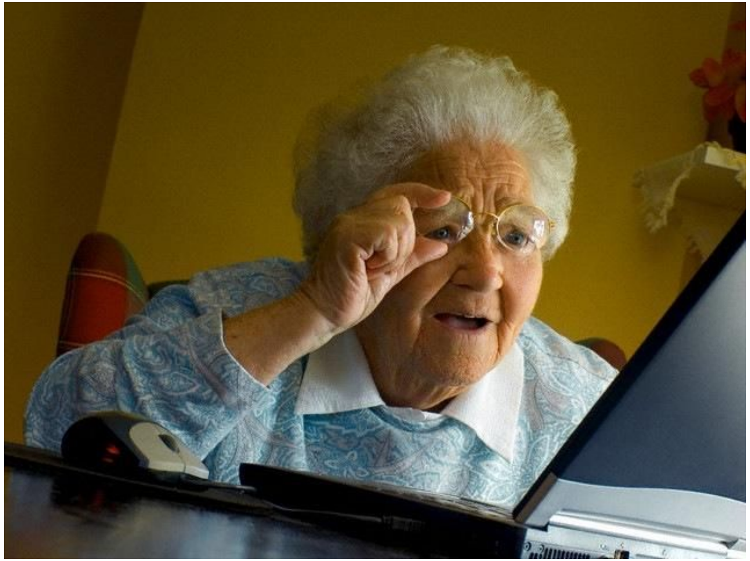
These plans are usually public to the entire organization as are client notes.

Ask the CS leader if you can check out a few success plans.

Step 4: What should you be looking for?

Here's a quick checklist you can use:

- ❏ Is the success plan active? Check the due dates and statuses
- ❏ Are the objectives/strategies data-driven? Can you spot any numbers?
- ❏ Is it story/quote worthy?



Step 5: You found a valuable nugget. Now what?

It's time to work through the steps you take to get approvals. It could look like this:

1. Let your CS team know your intentions
2. Have them make an intro with the client
3. Work with the customer to get approval
4. Get their story/quote published
5. Promote
6. Enable
7. Celebrate 🎉

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You should scale this!

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Step 6: Make it repeatable

Review success plans on the regular with your customer success peers. Here are some ideas on how to make that happen:

1. Schedule a quarterly review call.
2. Tag along on their success plan review calls.
3. Have a standing meeting with CS leader if they review the success plans regularly.

You Just Built A Customer Stories Pipeline Using Success Plans ⚡

Let's connect

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