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Module Nine:
Practical CSM Framework Phase 7: Engagement Evaluation
Workbook Two

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Module Nine:
**Practical CSM Framework Phase 7:
Engagement Evaluation**
Workbook Two

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In the previous workbook we had two in-depth conversations – firstly we looked at the Executive Business Review or EBR and discussed what it is, how to run it, who to invite and what topics it should cover. Then we changed direction and looked at the engagement evaluation process from perspective of continuing professional development or CPD.

Whereas in Workbook 1 we focused on engagement evaluation from the customer’s perspective, in Workbook 2 we will be examining engagement evaluation for our own benefit and for that of our own company.

Practical CSM Framework Phase 7: Engagement Evaluation – Video Two Agenda

- The Engagement Evaluation Tool
- The Personal Evaluation Tool
- The Customer Success Roadmap



As with many of our second workbooks within each module, this workbook is practical in nature, and the topics for discussion in Workbook Two will be as follows. Firstly we will examine the use of the two tools created for Phase Seven: Engagement Evaluation. These are the *Engagement Evaluation Tool*, and the *Personal Evaluation Tool*. After this we will discuss the use of a *Customer Success Roadmap* as a potential way to describe and explain the end-to-end engagement in a way that is palatable for busy senior business decision makers within the customer’s organization.

Using the Engagement Evaluation Tool

- The Engagement Evaluation Tool is not designed to replace a health score system but to be used alongside or in conjunction with such a system, if the CSM wants to evaluate a specific customer engagement in more detail



The *Engagement Evaluation Tool* is designed for CSMs to use either alone or within their own team, and is more of an internal tool than a customer facing one.

Many customer success organizations will have systems and tools to help with measuring and documenting customer success activity. These tools will typically incorporate a number of KPIs such as for example NPS (net promoter score) results, CSAT (customer satisfaction) scores, product utilization levels, support utilization levels, implementation progress, stakeholder seniority, and so on into a dashboard or heat map that combines these different KPIs to provide an overall “health score” for each customer relationship. This health score can then be monitored to gain an indication of the overall “health” of the relationship between customer and supplier, and can therefore be used by the CSM to help determine which customers might need more or less of their time to be input into them and what types of challenges might be needing to be resolved. These are great tools and they are also constantly being refined and improved to add yet more value for CSMs and their leaders. They have proved very popular both with individual CSMs to help with determining needs and allocating time to customers, and also with CS Leaders who can analyze the data in such systems over time to determine patterns of progress both in terms of any one particular customer engagement but also in terms of overall progress being made by the CS organization as a whole.

However, although the health score system has its place in any CS organization, when it comes to the nitty gritty of understanding what is happening, they might not provide sufficient detail of information. The *Engagement Evaluation Tool* has therefore been designed not to replace a health score system but to be used alongside or in conjunction with such a system, if the CSM wants to evaluate a specific customer engagement in more detail.

	A	B	C	D	E	F	G
		One	Two	Three	Four	Five	Six
1	Challenges Solved	Overcame hostile relationship with key decision maker	Turned around the Phase One adoption to bring it back on track				
2	Lessons Learned	Get Introduced as early as possible in the pre-sales process in order to establish CS value for the customer	Work closely with the AM to get introduced to all key stakeholders ASAP	Use the updated Adoption Readiness Checklist to ensure everything has been included in the adoption plan	Keep lines of communication open with Service Managers at all times		
3	Tools or Templates	New Customer Success Contract has been approved by Legal	Revised version of the Adoption Readiness Checklist				
4	Other Assets / Resources	Revised version of the Product X FAQ list now available online	Added a "Quick Start" section to the Product X Onboarding Kit				
5	Process Improvements	Can pull stakeholder info from Sales now (see below)					
6	Systems Improvements	Customer stakeholder information now fully integrated with Sales' CRM tool					
7	Successes to Celebrate	Turned round the key decision maker from negative to positive attitude towards us as the supplier	Hit target for Quarter 2 milestone for customer initiative by 15%	Exceeded Quarter 3 milestone for customer initiative by 15%	Secured customer commitment to go ahead with Phase 2	Secured customer commitment to work closely with us to develop a Phase 2 adoption roadmap	
8							

As with the majority of our tools, the *Engagement Evaluation Tool* has been created as a Microsoft Excel workbook with multiple worksheets within it. The first sheet is a worked example of an evaluation that is there to illustrate how the CSM might use the tool. After that there are tabs for evaluations that the CSM might wish to undertake for each major phase including for onboarding, adoption planning, adoption implementation and then for value realization for which four tabs are provided, assuming for example a once per annum evaluation takes place over the four years of value realization occurring for the particular engagement. CSMs can copy worksheets to create more evaluations as necessary or delete worksheets they do not require.

Each of these sheets has the following sections that the CSM can use to notate relevant information from their evaluation of the engagement:

- Challenges Solved
- Lessons Learned
- Tools or Templates
- Other Assets / Resources
- Process Improvements
- Systems Improvements
- Successes to Celebrate

A	B	C	D
	Value Gained by Customer	Value Gained by Supplier	Value Gained by CSM
1			
2	Value 1 Increased understanding of challenges relating to onboarding and adoption of Product X	Improved relationship with key decision maker Peter Fielding (CFO)	Improved relationship with key decision maker Peter Fielding (CFO)
3	Value 2 Reduced time and cost to launch Phase One adoption plan	Commitment gained from customer to go ahead with Phase 2	Improved relationship with the AM for this customer
4	Value 3 Phase One adoption "rescued" by applying our proposed amendments and workarounds, to get it back on track	Commitment gained from customer to involve us in the development of Phase 2 adoption plans	Deeper understanding of this customer's business culture and key challenges
5	Value 4 Key milestone targets for ultimate outcome achievement brought back to being hit by Quarter Two		
6	Value 5 Improved readiness for Phase Two		
7	Value 6		
8	Value 7		

After the evaluation worksheets there are four further worksheets. There is a worksheet that can be used to list a summary of the value attained from this CS engagements from the perspective each of the customer, the supplier and the CSM. There is also a worksheet that can be used to list the future improvements that need to be made for each of the customer, the supplier and the CSM, based upon the experiences undergone within this engagement thus far. Each of the above two worksheets also has an example provided so that the CSM can see how they might be used.

Using the Engagement Evaluation Tool

- What additional features or functionality of the existing products and services that this customer has purchased might its current users find useful?
- What additional features or functionality of the existing products and services that this customer has purchased might additional users from within the same or other parts of the customer's business find useful?



Having completed the evaluation, it may be worth the CSM giving some thought not only to what has already been delivered in terms of value to the customer, value to your own company and value to yourself as the CSM, but to what else could be done to generate even more value for one or more of these parties. The best way to approach this might be in the form of asking questions, this time relating to *additional value* that might be achievable. These questions might include:

“What additional features or functionality of the existing products and services that this customer has purchased might its current users find useful?”

“What additional features or functionality of the existing products and services that this customer has purchased might additional users from within the same or other parts of the customer's business find useful?”

Using the Engagement Evaluation Tool

- What features or functionality of additional products and services that this customer has not yet purchased might the customer find useful?
- What remaining challenges does the customer still have which we might be able to help them to address?
- What further opportunities does the customer now have which we might be able to help them to exploit?



“What features or functionality of additional products and services that this customer has not yet purchased might the customer find useful?”

“What remaining challenges does the customer still have which we might be able to help them to address?”

“What further opportunities does the customer now have which we might be able to help them to exploit?”

Using the Engagement Evaluation Tool

- What additional value from their current initiative might we be able to help our customer achieve?
- What additional ways to measure and report on value attainment from their current initiative might we be able to provide our customer with?
- How else can I increase the value I deliver to my customer and/or the stakeholders I work with?



“What additional value from their current initiative might we be able to help our customer achieve?”

“What additional ways to measure and report on value attainment from their current initiative might we be able to provide our customer with?”

“How else can I increase the value I deliver to my customer and/or the specific customer stakeholders I work with?”

Using the Engagement Evaluation Tool

- What else can I do to improve the relationship between this customer and my company?
- What else can I do to improve the relationship between myself and this company's key stakeholders?
- What else can I do to maximize the chances of service renewals occurring from this customer?



“What else can I do to improve the relationship between this customer and my company?”

“What else can I do to improve the relationship between myself and this company's key stakeholders?”

“What else can I do to maximize the chances of service renewals occurring from this customer?”

Using the Engagement Evaluation Tool

- What else can I do to maximize the revenue value of service renewals that do occur from this customer?
- What else can I do to maximize the expand opportunities from this customer?
- What else can I do to maximize the advocacy opportunities from this customer?



“What else can I do to maximize the revenue value of service renewals that do occur from this customer?”

“What else can I do to maximize the expand opportunities from this customer?”

“What else can I do to maximize the advocacy opportunities from this customer?”

Using the Engagement Evaluation Tool

- What else can I learn from working with this customer?
- What other work tasks completed with this customer can I document and/or template to help me and my fellow team members perform similar tasks with this or other customers in the future?



“What else can I learn from working with this customer?”

“What other work tasks completed with this customer can I document and/or template to help me and my fellow team members perform similar tasks with this or other customers in the future?”

Using the Personal Evaluation Tool

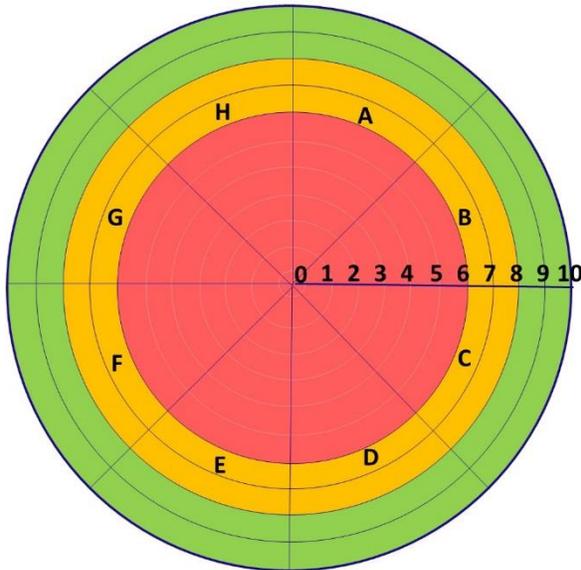
The Personal Evaluation Tool is designed for CSMs to evaluate their own performance within an engagement, in order to understand what aspects of their performance require improvements to be made that will enable the CSM to provide a better quality of service in future engagements



Now that the CSM has (either alone or as a team exercise with colleagues) evaluated the performance of the engagement, and considered the value returned for all parties – customer, supplier and CSM – and the lessons learned for future similar engagements, it makes a lot of sense for the CSM to evaluate their own performance within this engagement, again with a view to learning lessons about what went well that can be replicated in the future and what did not go so well that perhaps indicates a skill or knowledge gap that needs to be filled in order to perform even better next time.

The *Personal Evaluation Tool* is designed for CSMs to do exactly this. As with the Engagement Evaluation Tool it is up to the CSM as to how often to use the tool, or indeed whether or not to use the tool at all for any specific engagement. If the CSM manages just a few, larger engagements then it might make sense to perform the personal evaluation for each one. However if they manage many tens or hundreds of customer engagements then it will probably make more sense for CSMs to perform just one personal evaluation in any one period – perhaps quarterly or half annually for example – in order to gain the value from the evaluation process, but without overburdening themselves with unnecessary repetition of work.

Personal Evaluation Tool



CSM Name _____

Engagement Name _____

Date _____

For this specific engagement, print this page, and then use the spider chart to rate yourself from 0 to 10 in each area. Use this as a tool to determine where to focus your CPD (continuing professional development) efforts in the future.

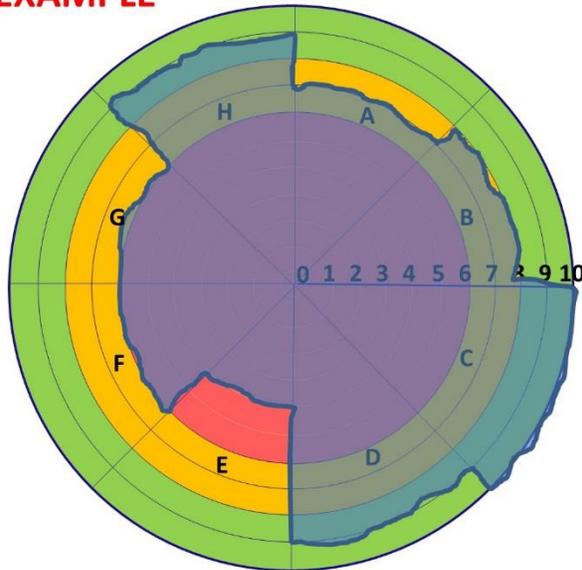
Scoring Matrix	
A	Time Management
B	Productivity / Efficiency
C	Quality of Output
D	Customer Experience
E	Customer Outcomes
F	Our Outcomes
G	Technical Skills
H	Soft Skills
TOTAL (max = 80)	



The *Personal Evaluation Tool* is very simple to use and is provided in Microsoft PowerPoint format which allows CSMs to amend and customize it very easily. The tool is based on the “Spider Chart” where you have a circle or “wheel” which is divided into a series of segments and concentric rings. Each segment relates to a specific aspect of a CSM’s performance within a customer engagement that could be evaluated. Each concentric ring represents a value from 0 to 10 that indicate the level of performance of the CSM for each aspect from low to high.

Personal Evaluation Tool

EXAMPLE



CSM Name: Angela Rodriguez

Engagement Name Smith Simpson LLC Collaboration

Date 19th December 2019

For this specific engagement, print this page, and then use the spider chart to rate yourself from 0 to 10 in each area. Use this as a tool to determine where to focus your CPD (continuing professional development) efforts in the future.

Scoring Matrix		
A	Time Management	7
B	Productivity / Efficiency	8
C	Quality of Output	10
D	Customer Experience	9
E	Customer Outcomes	4
F	Our Outcomes	6
G	Technical Skills	6
H	Soft Skills	9
TOTAL (max = 80)		59



Slide 1 within the tool is a worked example to give CSMs an illustration of how the tool should look once they have evaluated their personal performance. Slides 2 onwards contain identical copies of the actual tool itself, and of course CSMs can create more simply by copying one of these slides. The CSM can either print out a copy of one of these slides in order to perform the evaluation task manually using a pen, or if they are brave enough and have a steady enough hand (though it really doesn't need to be perfect) they can use the Microsoft PowerPoint "Scribble" tool that enables freehand line drawing to complete the evaluation electronically.

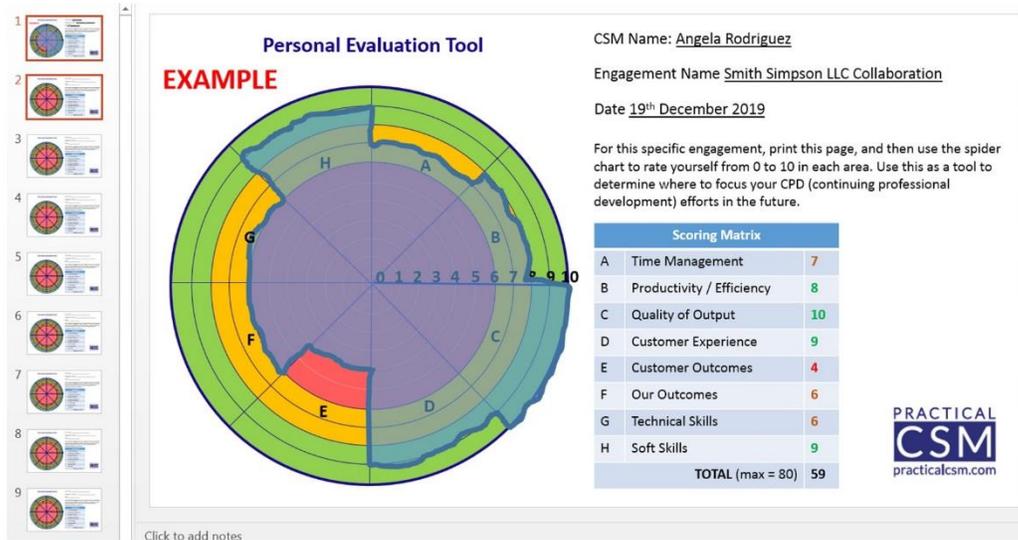
In either case, the CSM might want to firstly complete the Scoring Matrix to the bottom right, where they can score their performance in each aspect of the engagement from 0 (I didn't even start to do it) to 10 (I did it perfectly) and then perform a quick calculation to add up all the values in order to get their overall score for their performance. Once this has been done, the CSM can then go ahead and use the "Scribble" tool to represent the same scores but this time graphically on the spider chart.

If desired, the completed freehand drawing using the "Scribble" tool can then be formatted to be semi-transparent, which allows the spider diagram underneath to show through, and this is how the example in Slide 1 has been formatted. Performing the evaluation electronically can be a little fiddly, but the advantage of course is that all personal evaluations can be stored in the one PowerPoint presentation file, and a pattern of progress will begin to emerge over time that might be useful for the CSM to analyze. It also makes it a lot easier to share with others such as the CSM's line manager.

As well as performing a personal evaluation as a personal or private exercise, the CSM might also consider getting input from others. The two obvious groups to ask for performance related feedback from are the customer's stakeholders and those of the CSM's own colleagues who played their own active role within the engagement that the CSM's performance is being reviewed for. Perhaps the simplest way is to provide whoever you wish to gain feedback from with a copy of the Scoring Matrix for them to complete and return to you. This could be done via email, or perhaps the CSM could create a simple online survey using an online surveying tool such as Survey Monkey. Of course to be meaningful,

you have to be able to trust the data, so my recommendation would only be to send a personal evaluation request out to just those people (whether customer stakeholders or colleagues) with whom you have developed a sufficiently high level of trust relationship, and to consider also whether the person you are considering requesting an evaluation from is the type of person who would feel comfortable giving you their genuine evaluation of you or not, since not everyone will be.

Once the scoring is done – whether completed by oneself or with the help of others – the CSM needs to evaluate it. The data is all in the Scoring Matrix, but the point of creating a graphical representation of it using the Spider Chart is that a graphical representation of the data can often make the data more meaningful to us, and can therefore provide deeper insights than would be the case using tabular data alone. In a sense, how you “evaluate” your scores and what you do about them is entirely up to you. The default template uses a traffic light system, ranking anything scoring a 5 or less as red, anything scoring 6 or 7 as orange and anything that’s an 8 or above as green. This allows the CSM to immediately focus just on “the reds” – those aspects of their performance during the engagement that scored a 5 or less – until such time as all “the reds” have been improved upon, in which case the CSM can then turn their attention to “the oranges” and again work on eliminating all “oranges” until only “greens” are showing.



The “default” tool comes preloaded with eight of my own chosen aspects of personal CSM performance that I think are a good mix to use within a personal performance evaluation. You or your line manager might wish to use the same aspects, but if not, you can simply change them by replacing the names for any aspects you don’t like with the names of those that you do like. Just a minor point but what I mean precisely by any of these aspects is irrelevant, so long as you are clear as to what *you* mean by each aspect that you are going to include within your Personal Evaluation Tool, and it’s worth ensuring that everyone on the team uses the same definitions, so that meaningful comparisons can be made.

In addition to using a specific personal evaluation in isolation, as alluded to earlier the CSM and perhaps also their line manager might find it useful to review progress over time by looking at the pattern of changes over multiple evaluations carried out over a longer time period. Of course this cannot be performed until sufficient time has elapsed and enough personal evaluations have been completed, but at one evaluation per quarter, the CSM will soon build up enough personal evaluations to provide at least some level of pattern that they might be able to extend into the future to indicate by when they will for example have reached a goal of attaining “all greens”. Really the tool is just a starting point for the CSM and their line manager to use if desired. The point is not so much to insist upon this specific tool as being the best (and certainly not the only) way to evaluate a CSM’s personal performance within a customer engagement. Rather it serves as a reminder that CPD or continuing professional development best practice dictates that the evaluation of one’s performance should be carried out if not frequently then certainly regularly, and that the data collected should be analyzed for meaning and that meaning should then be used to inform the CSM as to what aspects of their skills and knowledge they might need to work on in order to increase their value both to their own company and to the customers that they will be engaging with in the future.



The Customer Success Roadmap



Senior decision makers are by their nature at least for the most part highly strategic in their outlook. As we saw in Module Two: Business Fundamentals, at the senior management layer, the responsibilities (and therefore the conversations and the interest levels) are around bigger picture corporate goals that align to the company's vision, and focus on planning for the wider strategies that will enable the company to attain those goals. The more detailed level of determining tactics to achieve specific objectives tends not to be their remit, and as such are of less concern to them, since these have been passed on to the middle management layers and below to deal with as appropriate.

This can be problematic for the CSM when attempting to engage with these senior decision makers, since the day-to-day work of the CSM is of course to work with middle and junior management to determine and implement these tactics in order to obtain the necessary objectives. Most if not all of what the CSM does is down at this "tactical" layer rather than being up at the "strategic" layer. So that being the case, how can CSMs become relevant to senior managers?

The first point to bear in mind when attempting to engage with and show relevance to senior business leaders is to "pan out" from the detail to see the whole of the larger picture, and to try to maintain this "wide angle but less detailed" view rather than zooming your lens too much into the finer details of any one part of that view. That's not to say that you cannot at times decide to discuss the details, but the point here is to always be mindful of what "zoom angle" – wider or narrow – you currently have and make sure it's the right one. A good rule of thumb is to kick off the conversation at the higher, wider angle level and then be led by the senior stakeholders themselves. If they want to drill down into the detail at any stage then by all means do so. If they don't show any desire to do so then keep the conversation at the higher level.

One benefit you'll find from keeping to a higher level or wider angle conversation is that you'll be able to cover a lot more ground a lot faster than if you are down in the details. This too will suit the senior leaders that you're meeting with, since of course their time is precious and they may well prefer for

example a 10 minute briefing followed by 20 minutes of discussion and agreeing high level next steps to a 3 hour workshop that covers the same ground but to a much deeper level.



The Customer Success Roadmap



Where the roadmap comes in is as both a useful aide memoir for the CSM to ensure they stay “on track” and keep the discussion pitched at the strategic level, and also as a visual aid for the business leader who may not be (or indeed probably will not desire to be) so knowledgeable about the initiative as those such as the SPL, CSM, process owners, team leaders and so on who are more involved in the initiative on an ongoing and day-to-day basis. The roadmap provides them with a simplified and graphical representation of the journey that the customer’s organization is undergoing. It shows the start point and the destination as well as the key milestones along the way. It provides an immediate “at-a-glance” understanding of the current situation and progress made to date. It clearly indicates performance levels (ie whether the initiative is on track to meet its outcomes or whether it is either ahead of or behind its targets) and it states in simple terms what the next steps are and what (if any) the implications of those next steps will be to the business.

In a sense it’s a high level business plan that is kept up-to-date by those who are charged with managing the success of the initiative, and is used by them to chart progress to date, to get a feel for what’s coming next and to brief the senior decision makers in a simple but effective way. The plan itself is really the roadmap, but the “roadmap documentation” should also contain some additional explanatory information, though of course it should all be kept to a high level and with a focus on business information rather than technical details.

Whether or not the CSM creates such roadmap documentation for a customer engagement really is down to the amount of value that the CSM perceives their customer’s business executives will get out of it, so it depends upon a number of factors, including the level of executive sponsorship for the initiative and the strategic importance of the initiative to the customer’s executive team. If the CSM decides to create the roadmap then it can be a great tool to use during EBRs (executive business reviews).

The Customer Success Roadmap

- The Business Initiative
- The Solution
- The Roadmap
- Financial Performance
- Discussion and Next Steps



A roadmap presentation might include the following components:

The Business Initiative (a brief overview of the customer’s corporate strategy that the initiative is supporting and a summary of the core business outcome requirements that the customer expects to attain from it)

The Solution (a description of the onboarding and adoption plans and implementation activities, as well as the value realization stage measurement and reporting activities, together with an explanation of the CSM’s role in each of these phases of the initiative.)

The Roadmap (a tabular and graphical representation of the timeline, showing activities and major milestones and indicating the current position within the initiative)

Financial Performance (a tabular and graphical representation of the cash flow, actual values against estimated figures and again tracking progress against major milestones and indicating the current position within the initiative)

Discussion and Next Steps (items for discussion, negotiation and agreement within the review meeting)

In addition to the roadmap presentation, the CSM might also expect to be “armed and ready” to provide more detailed information – for example research information, analyses, costings, adoption plan details and so on – that are not included in an “executive briefing” document such as the roadmap presentation, but which a business leader might potentially ask a question about.



The Customer Success Roadmap



To end this video, we will run through an example roadmap presentation “in character” as a role play of how the CSM and/or the Account manager or the customer’s own SPL with the CSM’s help and assistance might present the roadmap to senior executives. In this scenario the customer has purchased a “team collaboration” solution from the CSM’s company which is called Meteor Collaboration Systems, and adoption implementation has recently been completed for the second phase of the initiative. The overall initiative is now in Month 10 (ie partway through Q3) and everything is running to plan so far.



Good morning and thank you very much for attending this short executive briefing. My name is Julien Palmer and for those who have not previously met me, I am the Senior Customer Success Manager at Meteor Collaboration Systems that has been assigned to work with your own project lead Olivia Omondi to drive product adoption and to maximize value realization from your purchase of our team collaboration solution.

Success Roadmap

J.A.C. Lindberg LLC – Team Collaboration

Contents

- Business Initiative
- Solution
- Roadmap
- Financial Performance
- Discussion and Next Steps



Here is our agenda for today's meeting, which should take around 30 to 45 minutes depending upon the number of questions you have.

The Business Initiative: Team Collaboration



Strategy (why)

JACL is currently undergoing a strategic push to increase innovation in order to both improve upon existing products and services and develop and launch new ones.

Critical to this strategy is the ability for different teams within the business to collaborate and co-operate more fully both internally within the team itself and externally between teams.

In order to fulfil this strategic requirements, JACL has engaged us to provide an end-to-end, fully managed, immersive collaboration system that leverages the company's existing network infrastructure to deliver simple and effective real time voice and video conversations, collaboration applications and project management tools to everyone's desktop.

Outcomes and KPIs (what)

The ultimate success of the initiative will be determined by the following two business outcomes:

- Average time to launch both new and amended versions of existing products and services reduced by 25% within 30 months
- The entire initiative to have paid for itself and be generating financial value within 48 months

KPIs to measure to help indicate early progress towards outcome attainment:

- Inter and intra team collaboration within each region to increase by 100% within 12 months

Let me start by providing you with a very brief reminder of the business initiative we are supporting for you. One of your company's core strategies is to drive increased levels of innovation through the entirety of the business, and the initiative you have purchased our solution for supports this strategy by enhancing collaboration both within and between your teams, with the specific aim of reducing the average time to market of new products and services as well as updates to existing products and services by 25% within 30 months and you require the entire initiative to break even on your investment and start paying back within four years. In order to provide an early KPI indicator of progress towards these outcomes you have also set targets for both inter and intra team collaboration within each region to increase by 100% within 12 months.

The Solution: Team Collaboration



Adoption (how)

Our CSM is working closely with JACL to:

- Identify all impacted business capabilities and both directly and indirectly impacted users
- Determine users' KSA (knowledge, skill and attitude) needs
- Develop a detailed change management plan to implement the necessary CTS (communication, training and support) to ensure all users are fully engaged and able to perform their tasks productively and efficiently
- Implement the plan, taking measurements to assess and report on progress and where necessary to implement "get well" changes to bring the plan on track
- Note: The change management plan will be implemented over four phases, each phase relating to a major geographical region of the business

Value Realization (how much)

Value realization commences immediately following the onboarding and adoption activities for each phase, and continues for the duration of JACL's utilization of our collaboration solution.

The core activities of our CSM during this phase are to liaise with JACL to ensure that KPI measurements are taken and analyzed on a regular schedule and that progress is reported to decision makers, along with recommendations for change where necessary.

The initiative will run for a total period of 5 years.

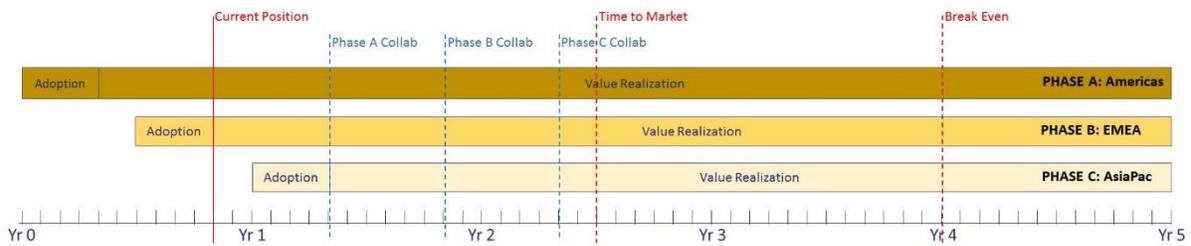
At the end of this period a view will be taken in terms of the appropriate technology required to meet the needs of the organization at that juncture.

As I mentioned earlier when I introduced myself, my role as senior customer success manager is to work closely with your project leader Olivia to drive adoption and ultimately to maximize the value that you realize from your investment in our collaboration solution. To do this, Olivia and I developed a carefully researched and validated plan for change management within your organization that included the necessary communication, training and support required by each user group that is either directly or even indirectly impacted by the initiative, which we then submitted to yourselves for approval.

The Roadmap: Team Collaboration

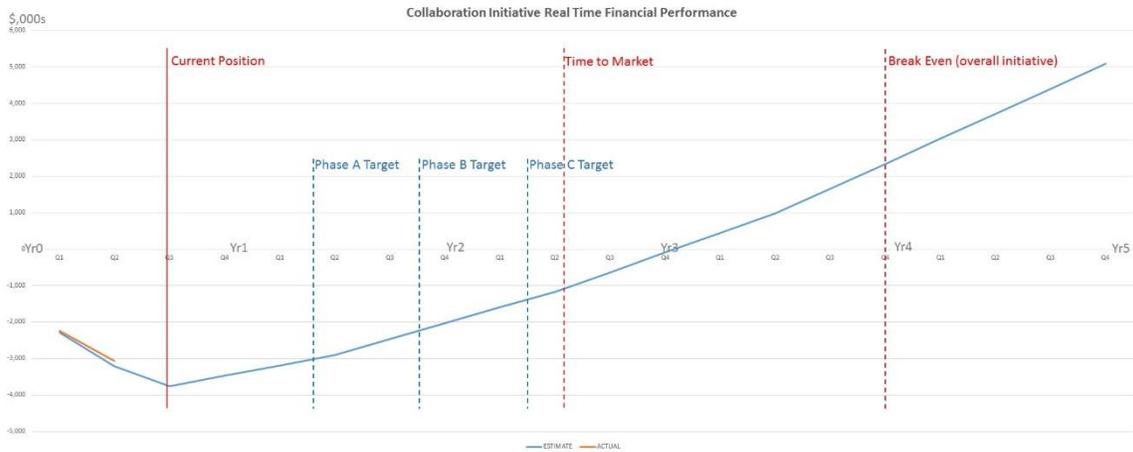


Major Milestones	Phase A: Americas	Phase B: EMEA	Phase C: AsiaPac
Adoption Start	Month 0 ✓	Month 7 ✓	Month 13
Value Realization Start	Month 5 ✓	Month 11 ✦	Month 17
'Collaboration' Targets Attained End	Month 16	Month 22	Month 28



As you know, we divided the adoption implementation into three phases, one each for the core regions in which you operate, and we started with Phase A in the Americas a few months ago, and started Phase B in EMEA very recently. We are now ten months in to the initiative, which is due to run for a total of five years which is represented by the timeline that is shown in the diagram at the bottom of this slide. Currently we have just completed adoption for Phase B and are starting into the value realization stage for this phase, and meantime Phase A has been in value realization for six months. We will shortly be commencing the adoption implementation for the final phase, Phase C which is for your AsiaPac region, which Olivia and I are currently busy preparing for.

Financial Performance: Team Collaboration



The chart on this slide tracks both estimated and actual performance on a quarterly basis, again shown over the full five year term of the initiative. The blue line is estimated and the brown line is actual performance. I am pleased to confirm that we are very much on track so far, though of course it is early days as yet. However the initial figures indicate that we are currently on target to reach our ultimate outcome of breaking even on the project for you within four years. Let me show you the figures so you can see how that is calculated...

Financial Performance: Team Collaboration



Amounts shown in \$,000s

	B	C	D	E	F	G	H	I	J
1		Est Expenditure	ACTUAL	Est Income	ACTUAL	Est Net Cash Flow	ACTUAL	Est Cumulative	ACTUAL
2	Q1	2,285	2,285	-	45	- 2,285	- 2,240	- 2,285	- 2,240
3	Q2	1,020	965	100	145	- 920	- 820	- 3,205	- 3,060
4	Q3	755		200		- 555		- 3,760	
5	Q4	65		350		285		- 3,475	
6	Q1	65		350		285		- 3,190	
7	Q2	65		350		285		- 2,905	
8	Q3	65		500		435		- 2,470	
9	Q4	65		500		435		- 2,035	
10	Q1	65		500		435		- 1,600	
11	Q2	65		500		435		- 1,165	
12	Q3	65		600		535		- 630	
13	Q4	65		600		535		- 95	
14	Q1	65		600		535		440	
15	Q2	65		600		535		975	
16	Q3	65		750		685		1,660	
17	Q4	65		750		685		2,345	
18	Q1	65		750		685		3,030	
19	Q2	65		750		685		3,715	
20	Q3	65		750		685		4,400	
21	Q4	65		750		685		5,085	
22		5,165		10,250		5,085			

Here is the financial information, calculated Quarterly in units of thousands of US dollars, again shown with both estimates for the entire five years and also with actual values collected for just the first two quarters of Year One, since of course as we are in Month 10, we just partway through Q3. As you can see, spending in the first two Quarters was pretty much exactly on target, and the value returned was in fact just a fraction higher than anticipated, which is great news, though of course as stated it is still early days. As things stand then, this means that our advice is simply to continue to roll out the plan as scheduled without making any significant changes to it.

Success Roadmap

J.A.C. Lindberg LLC – Team Collaboration

Discussion and Next Steps

- Sign off of Phase B adoption
- Commencement of Phase B value realization
- Appointment of Phase C project team
- Any other business
- Close



OK so that's the update, and now Olivia and I would be very happy to answer any questions you may have, plus we'd like gain your sign off for our Phase B adoption activities and the commencement of value realization for this phase, plus we'd also briefly like to touch on plans for appointment of the project team in the AsiaPac region for Phase C adoption which will be coming up very soon. But before we get into conversation about the things we want to talk about, let me first ask you if you have any questions you'd like to ask Olivia and me about what we have just presented to you?

End of Role Play.



The Customer Success Roadmap



So there was a simple example of what a business relevant conversation at an executive business review might look like when using a roadmap presentation as the format for the part of the discussion that focuses on existing and future activity leading up to the decision making stage in the meeting. After which it is entirely possible that other agenda items might also be discussed. This particular Customer Success Roadmap uses an example of a fairly large global rollout of a technology solution that supports a major customer strategy. Your own customer engagements will almost certainly be very different in size and in nature, and so you will probably not be able just to use my roadmap example as a template for your own Customer Success Proposals. Instead you'll need to take the core concepts shown here and apply them to your own situation to develop a template that is relevant to your own and your customers' needs.

In fact the roadmap you create does not have to resemble the one I have demonstrated here, it could take a very different format. It might not suit you for example to use PowerPoint as your medium for creating it, and you may decide you need more or less detailed information. You might elect to dwell more or less on the financials or even leave them out altogether. You want to include more details around adoption numbers, utilization figures or provide product or service utilization data, end user support statistics. Anything is possible, my only advice is to make sure you remember to keep the information you present relevant to the audience you are presenting to. So for example before you add a slide about service availability statistics, make sure to ask yourself "Why am I showing this information?" and "Why would my intended audience want or need to know this information?". Remember – the purpose of the Customer Success Roadmap is to provide a very simple, graphical way for senior execs to quickly understand *the business value* being generated from the initiative. Try not to add anything that's going to detract too much from this message.

Of course once you've created your first roadmap presentation you will have a template to develop further presentations for the same customer for future EBRs, and also potentially as a start point from which to develop new roadmaps for other customers as well.

Due to the strategic nature of the Customer Success Roadmap, the customer's Account Manager is likely going to be very interested either in attending the EBR or even potentially leading it. However it's done it makes sense to me that CSM and AM partner and collaborate to create and deliver the best possible Customer Success Roadmap for the customer's senior decision makers. In so doing it helps the CSM's company to generate additional executive relevance and drive senior executive sponsorship, and provides AMs with a powerful opportunity to network with and discuss the business challenges and opportunities with these senior executives in a non-sales-oriented environment.



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