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Module Ten:
Putting It All Together
Workbook One

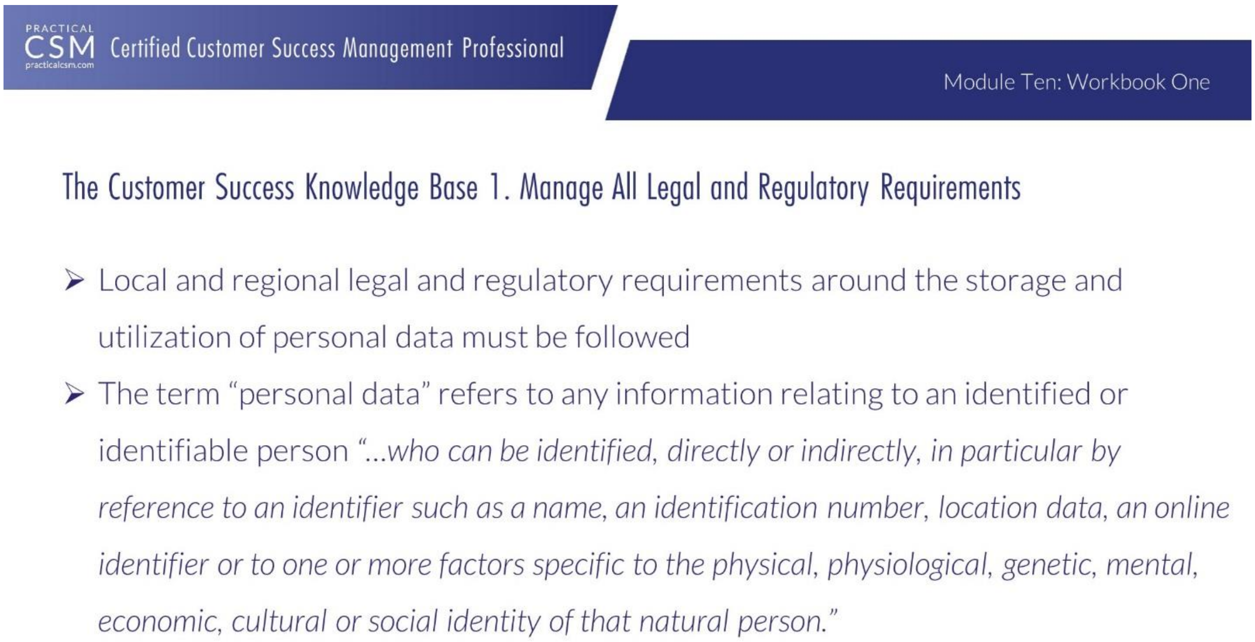
Here is the final module, Module 10, entitled *Putting it All Together*. This module is not specifically about any of the phases of the Practical CSM Framework as we have been going through in Modules 3 to 9. Instead it's about the whole thing – the end-to-end process of managing customers right from first contact or even beforehand, through to the complete realization of all the customers' (and indeed our own) outcomes.

Before you watch the videos, please make sure you have read Chapter Twelve: Concluding Thoughts and Chapter Three: Customer Success Management Tasks, Tools and Techniques from your training manual.

The topics for discussion in Video One are firstly a discussion around the concepts around and best practices for a customer success knowledge base, secondly, advice and ideas around selecting, utilizing and customizing a best practice framework, and finally a brief discussion on the benefits of using tools and templates and a summary of how to use each of the free to download tools and templates that we have been referencing for each of the phases within the Practical CSM Framework as we have been going along, and updating best practices.

One of the core concepts of the Practical CSM Framework which perhaps has not been given sufficient mention of as yet within these training videos, is called the "Central Repository". You can see this central repository in the standard Practical CSM Framework image, right in the middle of the diagram.

This central location for it is of course deliberate and is what makes it so useful. Its purpose is to act as a knowledge base for all customer success-related information and data, and to make it available to everyone who needs access to it. The Practical CSM Framework makes no stipulations about *how* you store the data you as an individual CSM and you and your colleagues as a CSM create, edit, manage and share. The only recommendations we'd make are:



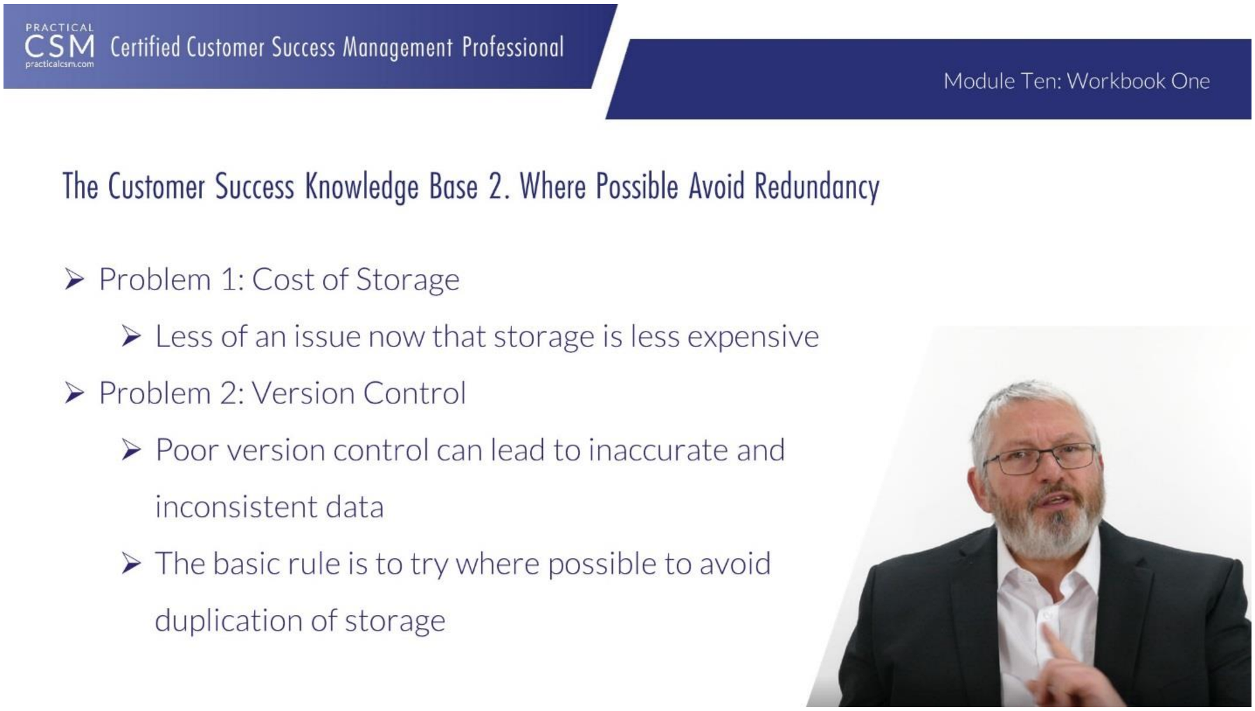
1. Manage All Legal and Regulatory Requirements

Make sure that any local and regional legal and regulatory requirements around the storage and utilization of personal data is followed. For example, if you are based in the European Union then it is likely your country follows the EU Data Protection Directive which provides the legal framework for how personal data can be used. In the USA on the other hand there is not one single data protection law equivalent to this directive, but instead there is a raft of legislation that it is important that companies ensure they are aware of.

The term "personal data" refers to any information relating to an identified or identifiable person *"…who can be identified, directly or indirectly, in particular by reference to an identifier such as a name, an identification number, location data, an online identifier or to one or more factors specific to the physical, physiological, genetic, mental, economic, cultural or social identity of that natural person."*

The EU directive makes the requirements regarding the use of such personal data shown above:

From the perspective of the CSM, the majority of data around things like the customer's organization, its strategies and initiatives, its challenges and outcome requirements, etc, would not fall under this type of legislation. However, data referring to individual customer stakeholders may fall into this category, and as such, CSMs need to make sure they follow their company's guidelines for storing and managing any such data at all times.



Data redundancy refers to any situation where the same data gets stored more than once, ie in more than one place – for example in two separate databases such as a sales system and then again in a customer success tool.

The basic advice is to try to avoid this situation where practicable. This is because it can potentially cause two problems:

Problem 1: Cost of Storage

This is the least worrying or concerning of the three potential problems, especially these days where the cost of storing data is very low, however it’s still a sensible and logical reason why storing things once is better than doing so multiple times.

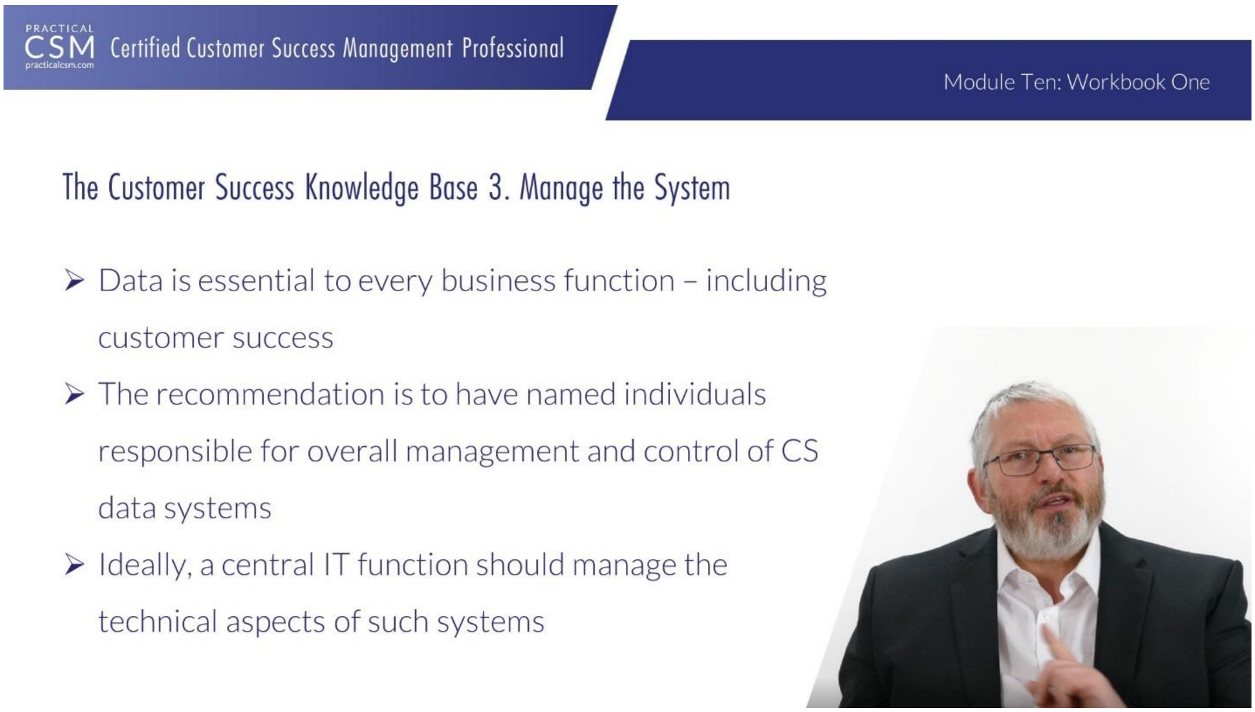
Problem 2: Version Control

The more important problem is that of controlling the accuracy and consistency of data. If the same data is stored in Systems A and B then of course a change to the data in System A needs to be reflected in the data stored in System B and vice versa. How will this be achieved? Also, what if changes are made to the same dataset in both systems at the same or similar time? Which version is now the up-to-date version, or should they be somehow merged, and if so, what rules should be followed as to which is the “final version” where conflicts arise?

Far better to just have one version of the data stored somewhere central, and then other systems can "look up" or "reference" this data via a connector, rather than keeping a separate version of it within their own databases.

Hopefully this provides a very basic explanation as to why data redundancy is best avoided where possible. Of course this "rule" is broken all of the time and in all sorts of different ways and situations, and often (though admittedly not always) for very good reasons. However it is a good general rule to keep in mind and apply whenever possible.

What does this mean to the CSM? It means that rather than keeping your own set of personal records about your work and your customers, it may be better to keep centralized records that your colleagues within the CSM team and potentially even some of your wider colleagues who also need to know about the customer can have appropriate access to. Conversely of course, you in turn will be able to gain access to the data they create.



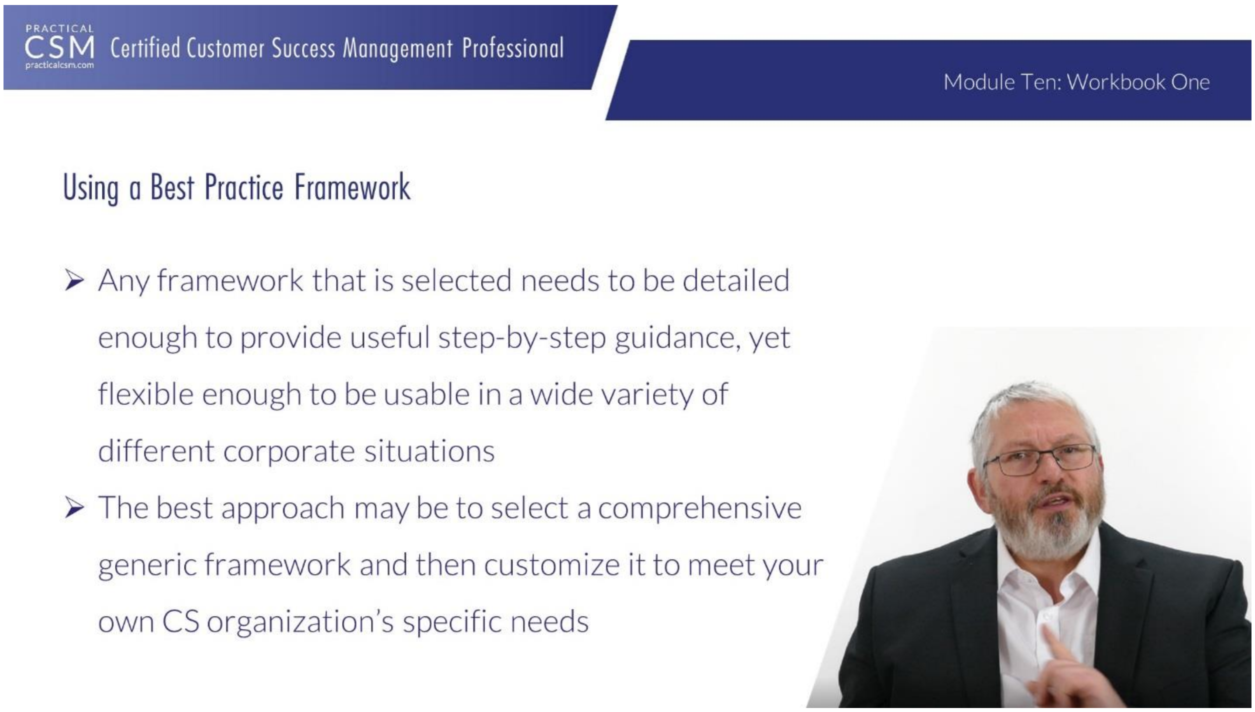
Data is very important to any business. I'm sure you have heard various statistics reported about the high percentage of companies that end up losing everything and going to the wall after a major data loss. As such then, it makes sense to me that one or preferably two or more named individuals should have overall responsibility for managing the data, in terms of controlling who has access to it and what type of access they have, from where it can be accessed and across what type of networks (for example there might be a different rule for someone who wants to look something up when using a personal smartphone from across an unsecured connection on a public phone network, compared with someone who might be accessing the same information but from inside the company's own secure network and on a corporate laptop. If the central repository for your CS data is managed for you by a dedicated IT team from your corporate IT department then that's great. On the other hand, if you are setting up and managing your central repository yourself as an individual or yourselves as a CS team then it might make sense to appoint someone with some experience of data management to be in charge, and/or to get some help and guidance from outside of the CS organization.

Wouldn't it be nice of everyone knew what they were meant to be doing? Wouldn't it be nicer still if there was help and assistance to determine what *is* the right thing to do, and then once this has been determined, a range of best practice tools, templates and step-by-step guidance to help you perform these tasks?

If the above sounds pretty much like how your company's customer success organization currently runs, then you should give yourself and your colleagues at least a metaphorical if not an actual pat on the back for managing to achieve what very few CS teams have yet achieved, and indeed what many CS teams can only dream about attaining in their wildest and most optimistic moments.

To be fair, some CS teams have now been around for a while – perhaps even a decade for one or two of the very earliest of adopters of customer success principals. For most companies however, their customer success team is much newer, and is still growing and changing rapidly. I would suggest that the majority of CS teams out there in the world in mid 2019 as I write this are probably anywhere in age from brand new or even still being formed as we speak, through to perhaps a lot of companies with CS teams around one to three years into their journey but still growing and changing, and some who are perhaps around five to seven years old and have possibly seen one or two or even more major shake-ups, strategy changes and perhaps even executive personnel changes in that timeframe.

The only way – or at least the only efficient and effective way – for a CS organization to grow is to adopt and disseminate a working methodology that is followed by all team members. Each CSM within the team needs to be performing the same tasks, and the strong recommendation is that they are performing those tasks in the same way, so that standards of both quality and productivity can be determined and then adhered to, so that managers can set their team meaningful tasks and then coach and support these team members effectively, so that measurements can be taken, records of activity can be kept and performances can be compared meaningfully. This means adopting a framework that specifies both what activities should happen and at least to an extent how those activities should be accomplished at each core stage within a standard customer engagement.

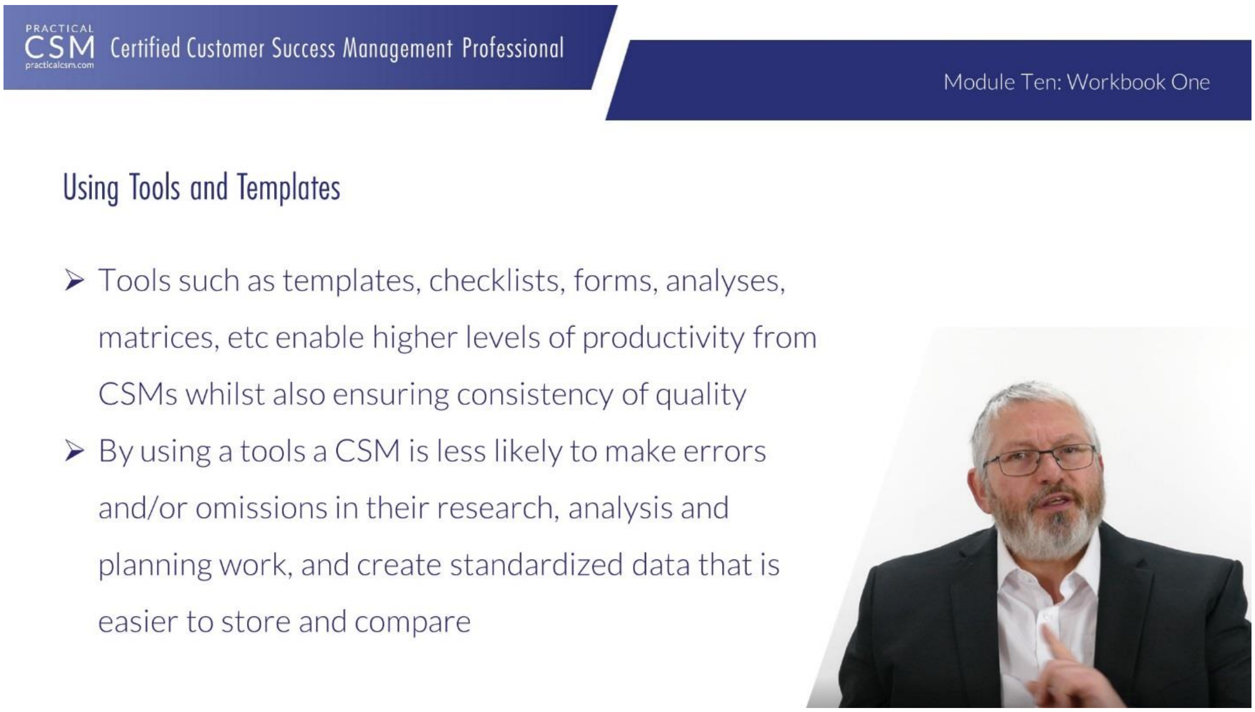


Of course, not all customer engagements *are* standard, so the trick here is to find a framework that follows the Pareto Principal (ie the 80/20 rule) here. In other words, a framework that covers 80% of the work and leaves the remaining 20% requiring improvisation is probably sufficient for most circumstances. Some companies' products and services and CS strategy will lend themselves better to standardization than others – so do not be surprised if that "80%" turns out to be just 60% or even 95% for your own company.

To be really usable for your team, the framework you select needs to be customized or tailored to meet your own company's specific situation, based upon your CS strategy (which in turn of course is based upon your wider corporate strategy), your company's products and services and ultimately the needs of your customers. Picking a pre-created, generic framework such as the Practical CSM Framework as your start point for creating this customized framework that specifically meets your own CS organization's needs makes sense, because instead of starting from scratch to build your own framework, you can use this pre-created one and just make whatever changes and adjustments you need to make, saving you time and effort.

Once you have used the Practical CSM Framework in the fulfilment of customer engagements a few times and built up some experience of how it works and what its strengths and weaknesses are from the perspective of your own company's specific needs and those of your customers, it should become clear to you what aspects of the framework work fine as they are and which parts of it need changing and in what ways they need to change. You may find that some aspects of it are not relevant to your own company's or your customers' needs, in which case there may be parts of the framework which you decide to eliminate entirely. Conversely you may find that you or they have additional needs that are not currently covered by the generic framework and which you may need to develop yourself and add into it.

The more you and your colleagues use the Practical CSM Framework or whatever other framework you decide to employ, the more you and they will become familiar with it and the better able you will be to know how it needs to be adapted to meet your requirements. Of course, there’s no reason why you cannot take several different generic frameworks or models of different types and then build a customized framework from your company by taking the best and/or most relevant ideas and concepts from each. Also, if your company has already developed its own framework, there’s no reason why you cannot retrospectively adjust it by making amendments or additions based upon ideas you see inside a generic framework such as the Practical CSM Framework which you had not previously thought of when developing your own framework previously.



In addition to using a framework to specific what to do and how to do it, the only way to enable high (or for that matter even reasonable) levels of productivity whilst maintaining quality standards is by providing the types of assets and resources that make the CSM's workload lighter, whilst at the same time reducing simple errors and omissions that can easily creep in to a person's work – especially when they are under pressure of time to complete a heavy workload, which I find is often the case for CSMs.

What we are talking about here are tools and templates. I'm not really trying to distinguish between those two terms, I simply mean anything that is a pre-created asset that helps CSMs by providing them with a tick list, or a questionnaire, or a step-by-step guide, or a model or a form to use and re-use every time they come across the specific situation that the particular tool or template was designed for.

By using a tool or template, the CSM is less likely to make errors of fact, because rather than writing everything down, they are just writing down the specific data that the tool or template requires them to collect, and they are less likely to make errors of omission because the tool or template will prompt them to perform all aspects of the relevant task as they work through it.

Another aspect of using tools and templates is that they standardize the data that is collected, making it a lot easier to store in (and indeed retrieve from) database systems and also making it easier for team members to share information between them and to help each other with analyses and report writing. It also makes line managers' tasks easier, both in terms of onboarding new recruits and also with coaching and advising existing team members.

As you are well aware, as well as being provided with the Practical CSM Framework, you also have access to a range of pre-created tools and templates for use across all the different phases of the framework, from Phase One: Preparation right through to Phase 7: Engagement Evaluation.

Here is a reminder of what these tools and templates are and what they are designed to help you to do:

In Phase 1: Preparation you have the Customer Research Checklist and the Customer Engagement Strategy.

The Customer Research Checklist is a very comprehensive, multiple worksheet Excel workbook, which provides a way to document all information about not just the customer but the entire engagement including customer information, solution information, initiative information, stakeholder information and current status information.

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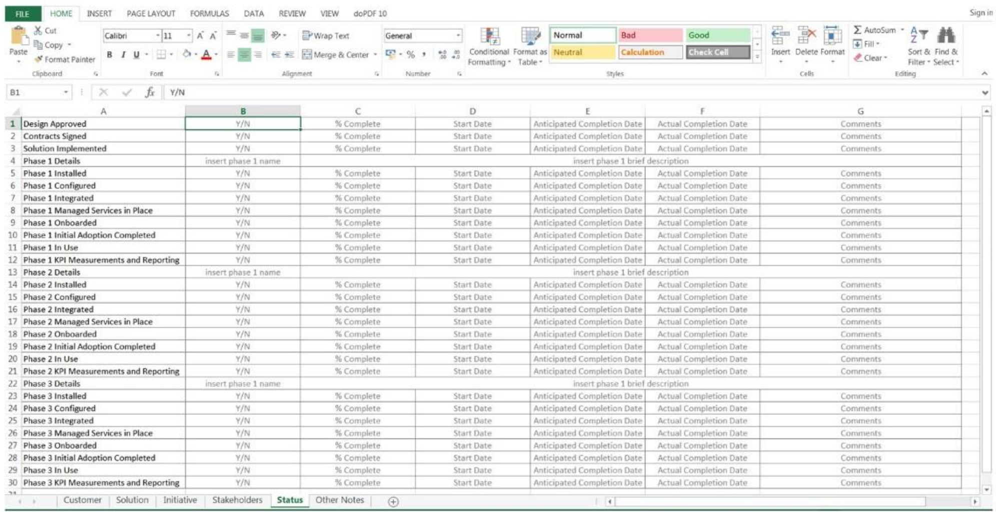
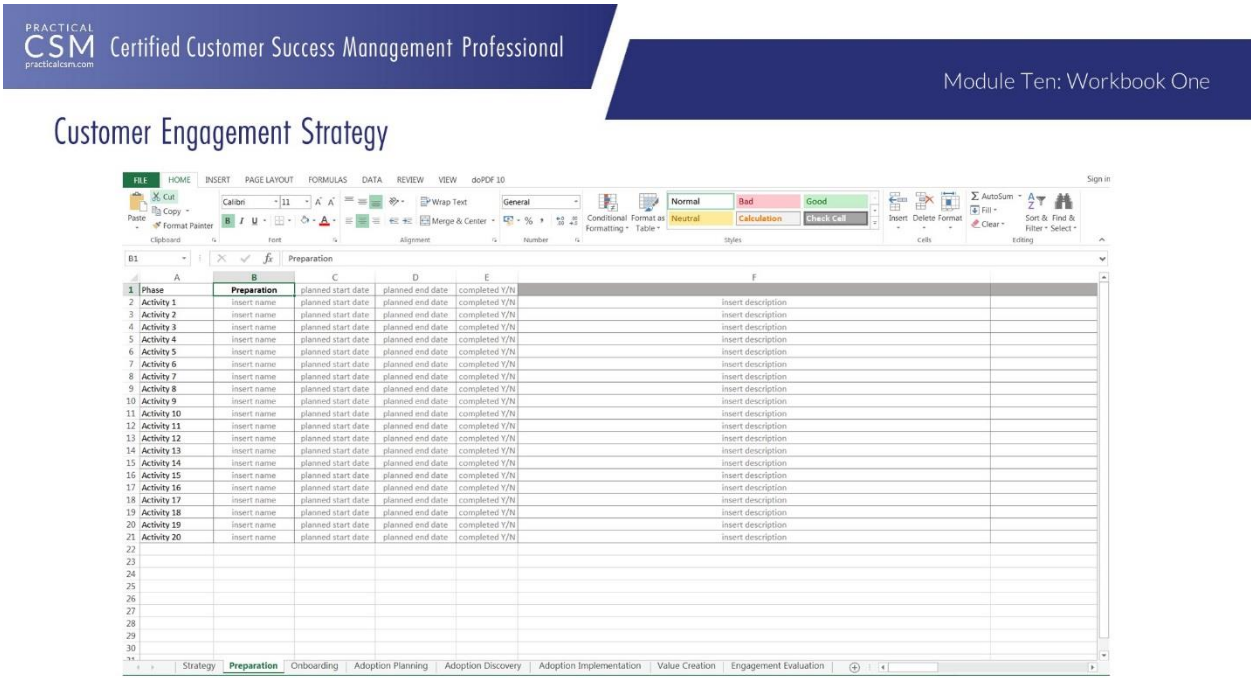
Module Ten: Workbook One

Customer Research Checklist



	A	B	C	D	E	F	G
1	Design Approved	Y/N	% Complete	Start Date	Anticipated Completion Date	Actual Completion Date	Comments
2	Contracts Signed	Y/N	% Complete	Start Date	Anticipated Completion Date	Actual Completion Date	Comments
3	Solution Implemented	Y/N	% Complete	Start Date	Anticipated Completion Date	Actual Completion Date	Comments
4	Phase 1 Details	insert phase 1 name			insert phase 1 brief description		
5	Phase 1 Installed	Y/N	% Complete	Start Date	Anticipated Completion Date	Actual Completion Date	Comments
6	Phase 1 Configured	Y/N	% Complete	Start Date	Anticipated Completion Date	Actual Completion Date	Comments
7	Phase 1 Integrated	Y/N	% Complete	Start Date	Anticipated Completion Date	Actual Completion Date	Comments
8	Phase 1 Managed Services in Place	Y/N	% Complete	Start Date	Anticipated Completion Date	Actual Completion Date	Comments
9	Phase 1 Onboarded	Y/N	% Complete	Start Date	Anticipated Completion Date	Actual Completion Date	Comments
10	Phase 1 Initial Adoption Completed	Y/N	% Complete	Start Date	Anticipated Completion Date	Actual Completion Date	Comments
11	Phase 1 In Use	Y/N	% Complete	Start Date	Anticipated Completion Date	Actual Completion Date	Comments
12	Phase 1 KPI Measurements and Reporting	Y/N	% Complete	Start Date	Anticipated Completion Date	Actual Completion Date	Comments
13	Phase 2 Details	insert phase 1 name			insert phase 1 brief description		
14	Phase 2 Installed	Y/N	% Complete	Start Date	Anticipated Completion Date	Actual Completion Date	Comments
15	Phase 2 Configured	Y/N	% Complete	Start Date	Anticipated Completion Date	Actual Completion Date	Comments
16	Phase 2 Integrated	Y/N	% Complete	Start Date	Anticipated Completion Date	Actual Completion Date	Comments
17	Phase 2 Managed Services in Place	Y/N	% Complete	Start Date	Anticipated Completion Date	Actual Completion Date	Comments
18	Phase 2 Onboarded	Y/N	% Complete	Start Date	Anticipated Completion Date	Actual Completion Date	Comments
19	Phase 2 Initial Adoption Completed	Y/N	% Complete	Start Date	Anticipated Completion Date	Actual Completion Date	Comments
20	Phase 2 In Use	Y/N	% Complete	Start Date	Anticipated Completion Date	Actual Completion Date	Comments
21	Phase 2 KPI Measurements and Reporting	Y/N	% Complete	Start Date	Anticipated Completion Date	Actual Completion Date	Comments
22	Phase 3 Details	insert phase 1 name			insert phase 1 brief description		
23	Phase 3 Installed	Y/N	% Complete	Start Date	Anticipated Completion Date	Actual Completion Date	Comments
24	Phase 3 Configured	Y/N	% Complete	Start Date	Anticipated Completion Date	Actual Completion Date	Comments
25	Phase 3 Integrated	Y/N	% Complete	Start Date	Anticipated Completion Date	Actual Completion Date	Comments
26	Phase 3 Managed Services in Place	Y/N	% Complete	Start Date	Anticipated Completion Date	Actual Completion Date	Comments
27	Phase 3 Onboarded	Y/N	% Complete	Start Date	Anticipated Completion Date	Actual Completion Date	Comments
28	Phase 3 Initial Adoption Completed	Y/N	% Complete	Start Date	Anticipated Completion Date	Actual Completion Date	Comments
29	Phase 3 In Use	Y/N	% Complete	Start Date	Anticipated Completion Date	Actual Completion Date	Comments
30	Phase 3 KPI Measurements and Reporting	Y/N	% Complete	Start Date	Anticipated Completion Date	Actual Completion Date	Comments

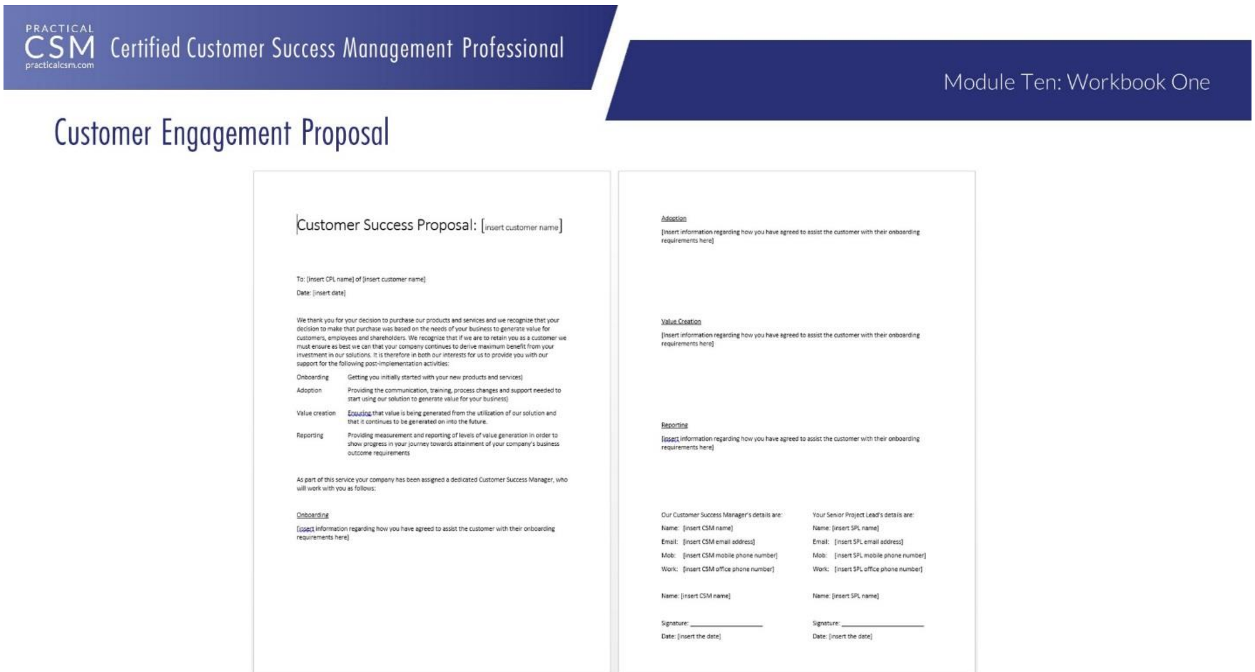
The Customer Research Checklist is a very comprehensive, multiple worksheet Excel workbook, which provides a way to document all information about not just the customer but the entire engagement including customer information, solution information, initiative information, stakeholder information and current status information.



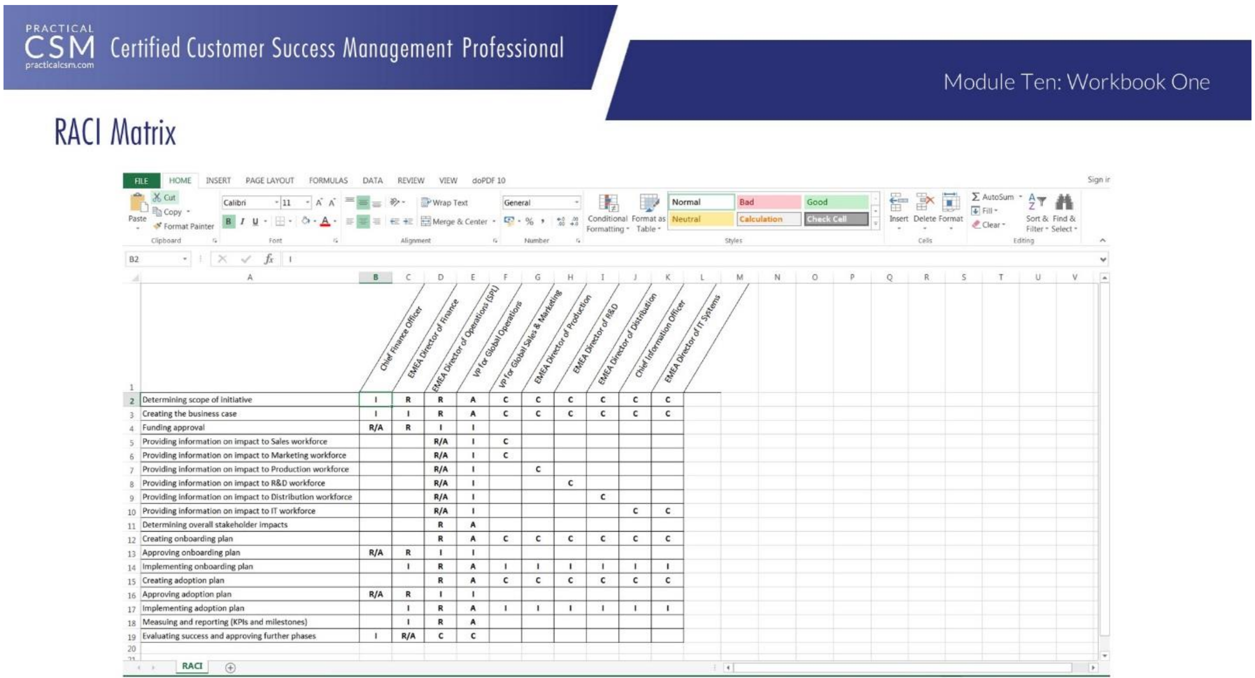
Phase	Preparation	planned start date	planned end date	completed Y/N	
Activity 1	insert name	planned start date	planned end date	completed Y/N	insert description
Activity 2	insert name	planned start date	planned end date	completed Y/N	insert description
Activity 3	insert name	planned start date	planned end date	completed Y/N	insert description
Activity 4	insert name	planned start date	planned end date	completed Y/N	insert description
Activity 5	insert name	planned start date	planned end date	completed Y/N	insert description
Activity 6	insert name	planned start date	planned end date	completed Y/N	insert description
Activity 7	insert name	planned start date	planned end date	completed Y/N	insert description
Activity 8	insert name	planned start date	planned end date	completed Y/N	insert description
Activity 9	insert name	planned start date	planned end date	completed Y/N	insert description
Activity 10	insert name	planned start date	planned end date	completed Y/N	insert description
Activity 11	insert name	planned start date	planned end date	completed Y/N	insert description
Activity 12	insert name	planned start date	planned end date	completed Y/N	insert description
Activity 13	insert name	planned start date	planned end date	completed Y/N	insert description
Activity 14	insert name	planned start date	planned end date	completed Y/N	insert description
Activity 15	insert name	planned start date	planned end date	completed Y/N	insert description
Activity 16	insert name	planned start date	planned end date	completed Y/N	insert description
Activity 17	insert name	planned start date	planned end date	completed Y/N	insert description
Activity 18	insert name	planned start date	planned end date	completed Y/N	insert description
Activity 19	insert name	planned start date	planned end date	completed Y/N	insert description
Activity 20	insert name	planned start date	planned end date	completed Y/N	insert description

The Customer Engagement Strategy is another fully featured and multi-worksheet Excel Workbook that provides places for storing information pertaining to the overall strategy, followed by more detailed information relating to activities that will need to be performed within each of the seven phases of the Practical CSM Framework, from Preparation through to Engagement Evaluation.

In Phase Two: Commitment you have the Customer Engagement Proposal, the RACI Matrix, the Stakeholder Management Matrix, and the Stakeholder Management Plan.

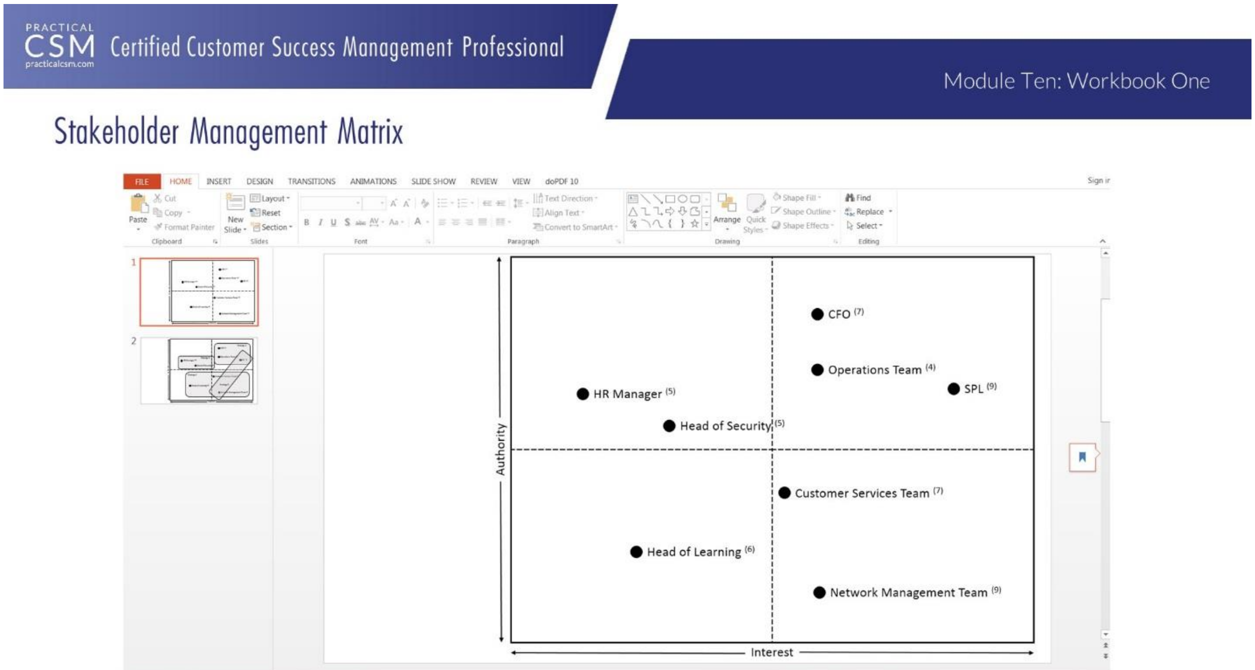


The purpose of the Customer Engagement Proposal is to provide a very simple, basic start point for creating a proposal that lists the work the CSM will perform on behalf of a particular customer, and which can be signed by both CSM and customer lead stakeholder, so that there is a definitive and mutual understanding as to the nature and purpose of the engagement.



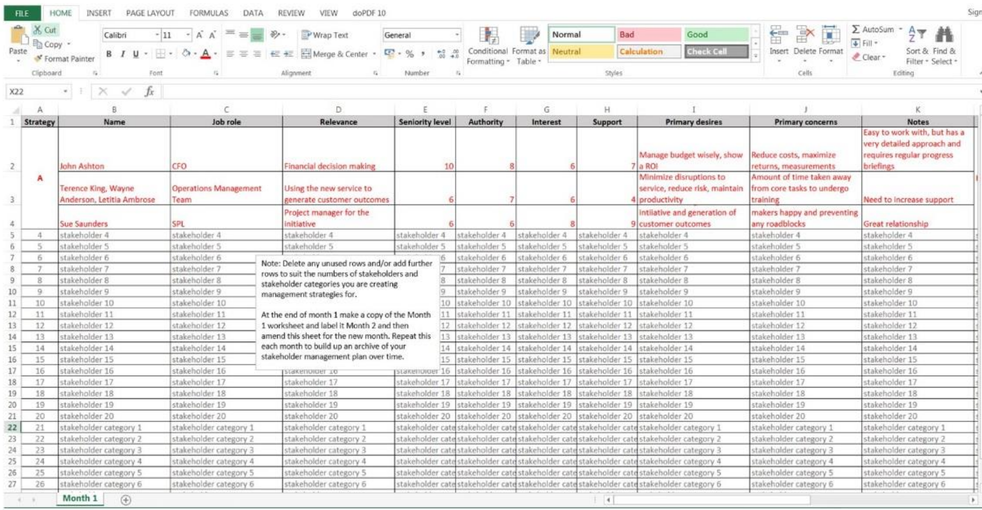
	Chief Finance Officer	EMEA Director of Finance	EMEA Director of Operations (SPL)	VP for Global Operations	VP for Global Sales & Marketing	EMEA Director of Production	EMEA Director of R&D	EMEA Director of Distribution	Chief Information Officer	EMEA Director of IT Systems
Determining scope of initiative	I	R	R	A	C	C	C	C	C	C
Creating the business case	I	I	R	A	C	C	C	C	C	C
Funding approval	R/A	R	I	I						
Providing information on impact to Sales workforce			R/A	I	C					
Providing information on impact to Marketing workforce			R/A	I	C					
Providing information on impact to Production workforce			R/A	I		C				
Providing information on impact to R&D workforce			R/A	I			C			
Providing information on impact to Distribution workforce			R/A	I				C		
Providing information on impact to IT workforce			R/A	I					C	C
Determining overall stakeholder impacts			R	A						
Creating onboarding plan			R	A	C	C	C	C	C	C
Approving onboarding plan	R/A	R	I	I						
Implementing onboarding plan		I	R	A	I	I	I	I	I	I
Creating adoption plan			R	A	C	C	C	C	C	C
Approving adoption plan	R/A	R	I	I						
Implementing adoption plan		I	R	A	I	I	I	I	I	I
Measuing and reporting (KPIs and milestones)		I	R	A						
Evaluating success and approving further phases	I	R/A	C	C						

The RACI Matrix is a tool which the CSM can use to start to understand which of the customer's stakeholders are responsible for the different tasks that will be performed within the customer's initiative, and what those tasks are.



The Stakeholder Management Matrix is designed to provide help with analyzing the relative levels of authority, interest and support that each customer stakeholder has for the initiative. This can then serve as a start point for determining a customer stakeholder management strategy to enable change.

Stakeholder Management Plan



Strategy	Name	Job role	Relevance	Seniority level	Authority	Interest	Support	Primary desires	Primary concerns	Notes
A	John Ashton	CFO	Financial decision making	10	8	6	7	Manage budget wisely, show a ROI	Reduce costs, maximize returns, measurements	Easy to work with, but has a very detailed approach and requires regular progress briefings
	Terence King, Wayne Anderson, Letitia Ambrose	Operations Management Team	Using the new service to generate customer outcomes	6	7	6	4	Minimize disruptions to service, reduce risk, maintain productivity	Amount of time taken away from core tasks to undergo training	Need to increase support
	Sue Saunders	SPL	Project manager for the initiative	6	6	8	9	intiative and generation of customer outcomes	makers happy and preventing any roadblocks	Great relationship
4	stakeholder 4	stakeholder 4	stakeholder 4	stakeholder 4	stakeholder 4	stakeholder 4	stakeholder 4	stakeholder 4	stakeholder 4	stakeholder 4
5	stakeholder 5	stakeholder 5	stakeholder 5	stakeholder 5	stakeholder 5	stakeholder 5	stakeholder 5	stakeholder 5	stakeholder 5	stakeholder 5
6	stakeholder 6	stakeholder 6		6	stakeholder 6	stakeholder 6	stakeholder 6	stakeholder 6	stakeholder 6	stakeholder 6
7	stakeholder 7	stakeholder 7		7	stakeholder 7	stakeholder 7	stakeholder 7	stakeholder 7	stakeholder 7	stakeholder 7
8	stakeholder 8	stakeholder 8		8	stakeholder 8	stakeholder 8	stakeholder 8	stakeholder 8	stakeholder 8	stakeholder 8
9	stakeholder 9	stakeholder 9		9	stakeholder 9	stakeholder 9	stakeholder 9	stakeholder 9	stakeholder 9	stakeholder 9
10	stakeholder 10	stakeholder 10		10	stakeholder 10	stakeholder 10	stakeholder 10	stakeholder 10	stakeholder 10	stakeholder 10
11	stakeholder 11	stakeholder 11		11	stakeholder 11	stakeholder 11	stakeholder 11	stakeholder 11	stakeholder 11	stakeholder 11
12	stakeholder 12	stakeholder 12		12	stakeholder 12	stakeholder 12	stakeholder 12	stakeholder 12	stakeholder 12	stakeholder 12
13	stakeholder 13	stakeholder 13		13	stakeholder 13	stakeholder 13	stakeholder 13	stakeholder 13	stakeholder 13	stakeholder 13
14	stakeholder 14	stakeholder 14		14	stakeholder 14	stakeholder 14	stakeholder 14	stakeholder 14	stakeholder 14	stakeholder 14
15	stakeholder 15	stakeholder 15		15	stakeholder 15	stakeholder 15	stakeholder 15	stakeholder 15	stakeholder 15	stakeholder 15
16	stakeholder 16	stakeholder 16		16	stakeholder 16	stakeholder 16	stakeholder 16	stakeholder 16	stakeholder 16	stakeholder 16
17	stakeholder 17	stakeholder 17	stakeholder 17	stakeholder 17	stakeholder 17	stakeholder 17	stakeholder 17	stakeholder 17	stakeholder 17	stakeholder 17
18	stakeholder 18	stakeholder 18	stakeholder 18	stakeholder 18	stakeholder 18	stakeholder 18	stakeholder 18	stakeholder 18	stakeholder 18	stakeholder 18
19	stakeholder 19	stakeholder 19	stakeholder 19	stakeholder 19	stakeholder 19	stakeholder 19	stakeholder 19	stakeholder 19	stakeholder 19	stakeholder 19
20	stakeholder 20	stakeholder 20	stakeholder 20	stakeholder 20	stakeholder 20	stakeholder 20	stakeholder 20	stakeholder 20	stakeholder 20	stakeholder 20
21	stakeholder category 1	stakeholder category 1	stakeholder category 1	stakeholder cate	stakeholder cate	stakeholder cate	stakeholder cate	stakeholder category 1	stakeholder category 1	stakeholder category 1
22	stakeholder category 2	stakeholder category 2	stakeholder category 2	stakeholder cate	stakeholder cate	stakeholder cate	stakeholder cate	stakeholder category 2	stakeholder category 2	stakeholder category 2
23	stakeholder category 3	stakeholder category 3	stakeholder category 3	stakeholder cate	stakeholder cate	stakeholder cate	stakeholder cate	stakeholder category 3	stakeholder category 3	stakeholder category 3
24	stakeholder category 4	stakeholder category 4	stakeholder category 4	stakeholder cate	stakeholder cate	stakeholder cate	stakeholder cate	stakeholder category 4	stakeholder category 4	stakeholder category 4
25	stakeholder category 5	stakeholder category 5	stakeholder category 5	stakeholder cate	stakeholder cate	stakeholder cate	stakeholder cate	stakeholder category 5	stakeholder category 5	stakeholder category 5
26	stakeholder category 6	stakeholder category 6	stakeholder category 6	stakeholder cate	stakeholder cate	stakeholder cate	stakeholder cate	stakeholder category 6	stakeholder category 6	stakeholder category 6

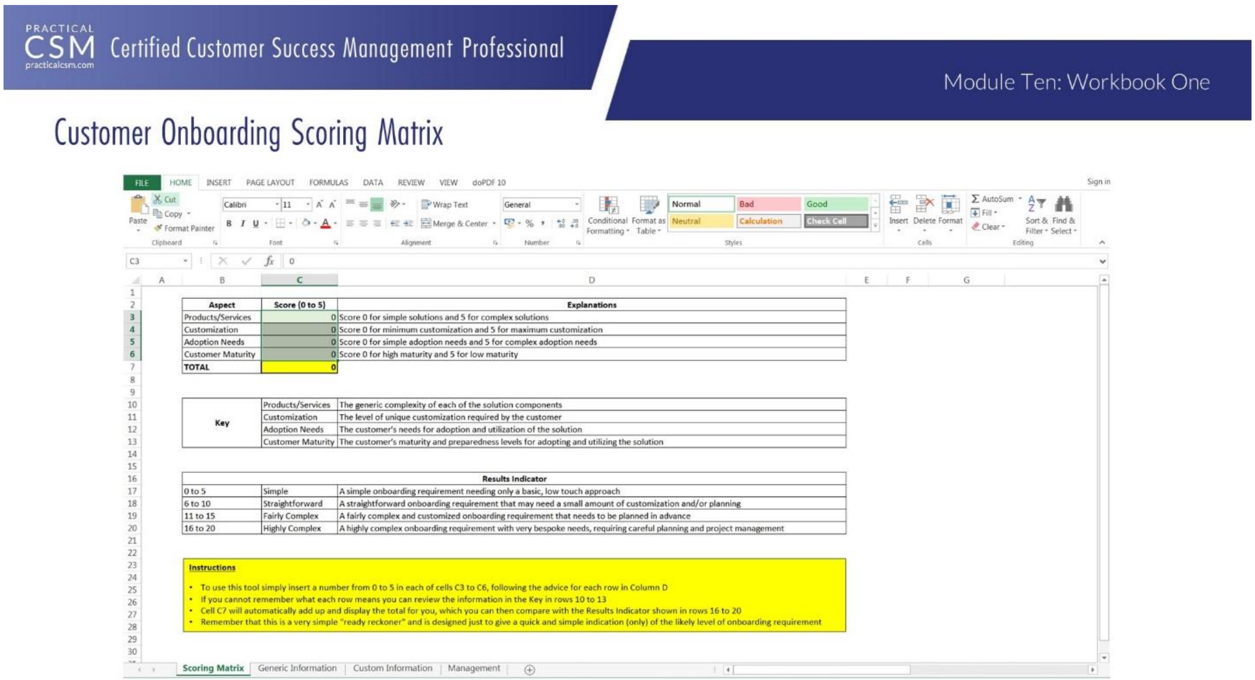
Note: Delete any unused rows and/or add further rows to suit the numbers of stakeholders and stakeholder categories you are creating management strategies for.

At the end of month 1 make a copy of the Month 1 worksheet and label it Month 2 and then amend this sheet for the new month. Repeat this each month to build up an archive of your stakeholder management plan over time.

Month 1

The Stakeholder Management Plan provides a way to create, document and then manage the ongoing implementation of the CSM's stakeholder management plan. A tab for the first month's plan is provided, and the CSM then makes a copy of this tab for each subsequent month, amending the strategy as necessary as time progresses.

In Phase Three: Onboarding you have the Customer Onboarding Scoring Matrix, the Onboarding Requirements Capture Template, the Onboarding Work Plan, and the CSM Activity Tracking Template.



Aspect	Score (0 to 5)	Explanations
Products/Services	0	Score 0 for simple solutions and 5 for complex solutions
Customization	0	Score 0 for minimum customization and 5 for maximum customization
Adoption Needs	0	Score 0 for simple adoption needs and 5 for complex adoption needs
Customer Maturity	0	Score 0 for high maturity and 5 for low maturity
TOTAL	0	

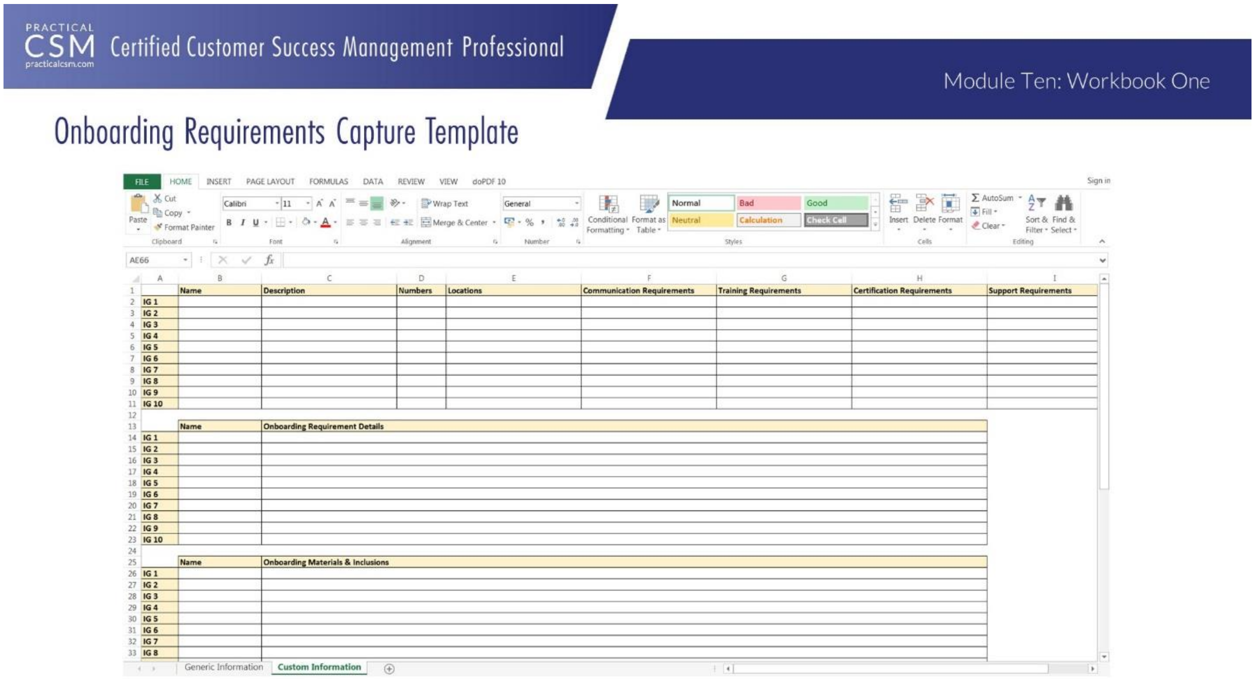
Key	Products/Services	The generic complexity of each of the solution components
	Customization	The level of unique customization required by the customer
	Adoption Needs	The customer's needs for adoption and utilization of the solution
	Customer Maturity	The customer's maturity and preparedness levels for adopting and utilizing the solution

	Results Indicator	
0 to 5	Simple	A simple onboarding requirement needing only a basic, low touch approach
6 to 10	Straightforward	A straightforward onboarding requirement that may need a small amount of customization and/or planning
11 to 15	Fairly Complex	A fairly complex and customized onboarding requirement that needs to be planned in advance
16 to 20	Highly Complex	A highly complex onboarding requirement with very bespoke needs, requiring careful planning and project management

Instructions

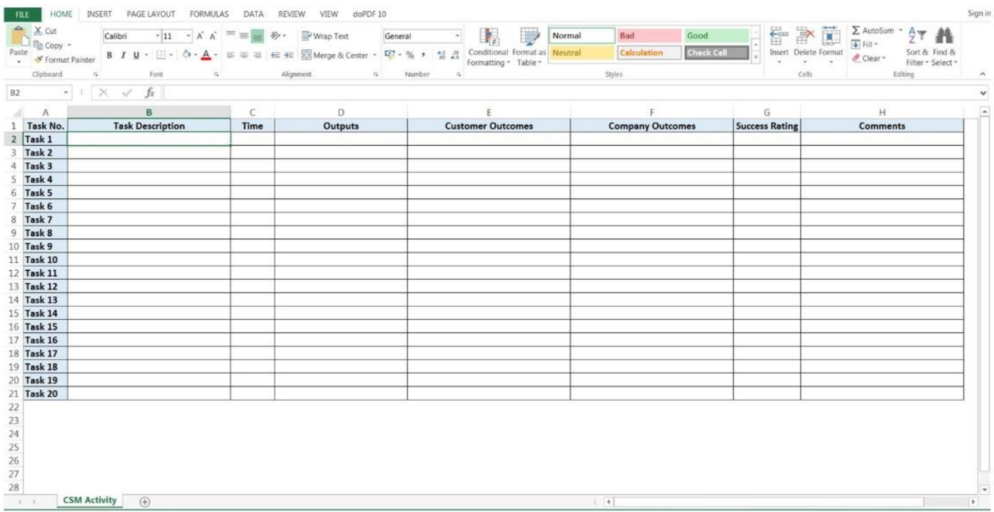
- To use this tool simply insert a number from 0 to 5 in each of cells C3 to C6, following the advice for each row in Column D
- If you cannot remember what each row means you can review the information in the Key in rows 10 to 13
- Cell C7 will automatically add up and display the total for you, which you can then compare with the Results Indicator shown in rows 16 to 20
- Remember that this is a very simple "ready reckoner" and is designed just to give a quick and simple indication (only) of the likely level of onboarding requirement

The Customer Onboarding Scoring Matrix is a simple way to gain a quick and basic understanding as to the likely level of simplicity or complexity of a specific customer's onboarding requirements, based on the four criteria of generic product/service complexity, the amount of customization required by the customer, the customer's adoption and utilization requirements, and the customer's current level of maturity in adopting and utilizing these sorts of products and services.



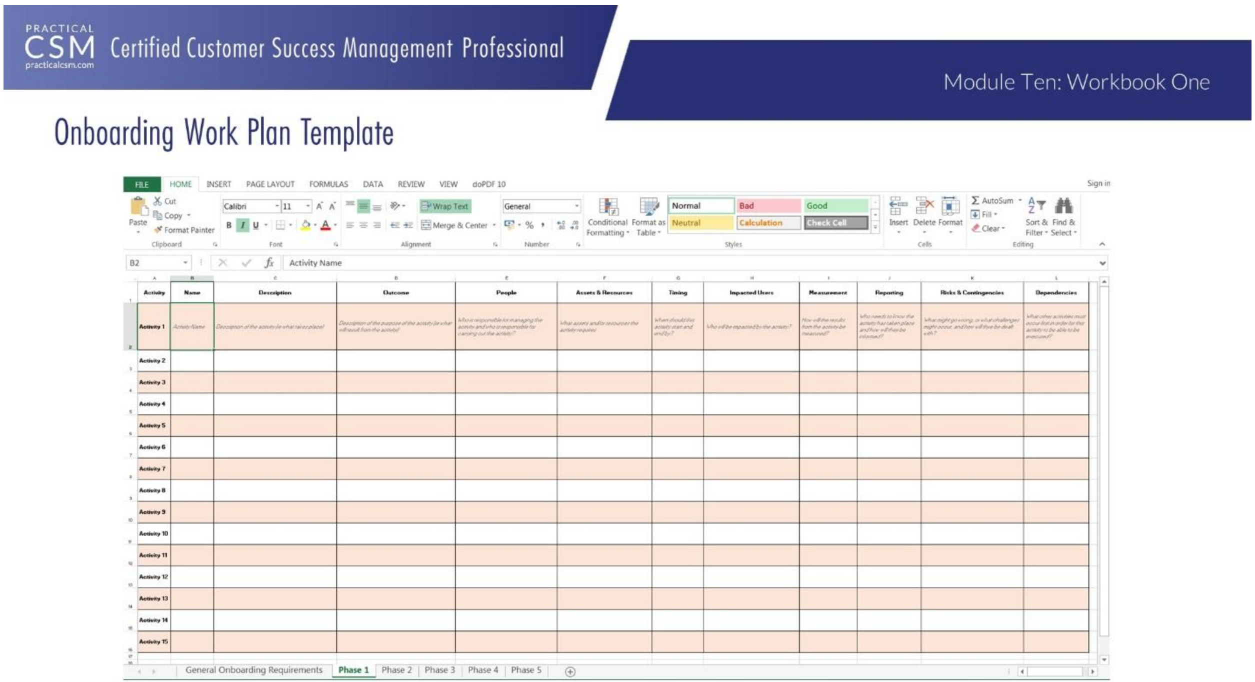
The Onboarding Requirements Capture Template is another Excel workbook, this time divided into two worksheets, where the first worksheet provides a list of information pertaining to generic onboarding requirements and the second worksheet provides a list of information pertaining to customized onboarding requirements. These two worksheets provide a way of making sure all information pertaining to a customer's onboarding requirements is uncovered, discussed and fully documented.

CSM Activity Tracking Template



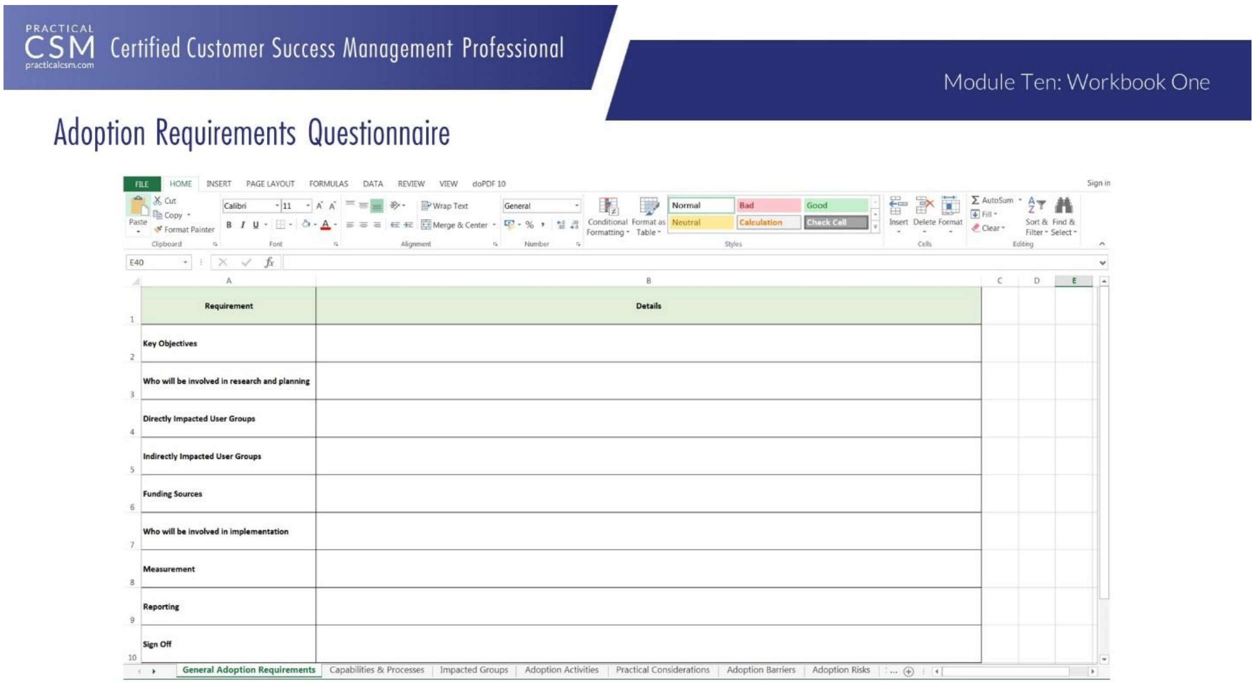
Task No.	Task Description	Time	Outputs	Customer Outcomes	Company Outcomes	Success Rating	Comments
Task 1							
Task 2							
Task 3							
Task 4							
Task 5							
Task 6							
Task 7							
Task 8							
Task 9							
Task 10							
Task 11							
Task 12							
Task 13							
Task 14							
Task 15							
Task 16							
Task 17							
Task 18							
Task 19							
Task 20							

The CSM Activity Tracking Template is really just a task list that is there for the CSM to make sure they document the important activity steps that need to be taken for onboarding. As well as being useful as a tool for the CSM him or herself, it provides a good mechanism for team leaders and/or line managers to review current, historic and proposed activities with their team and to set or amend tasks to help steer team members in the right direction.

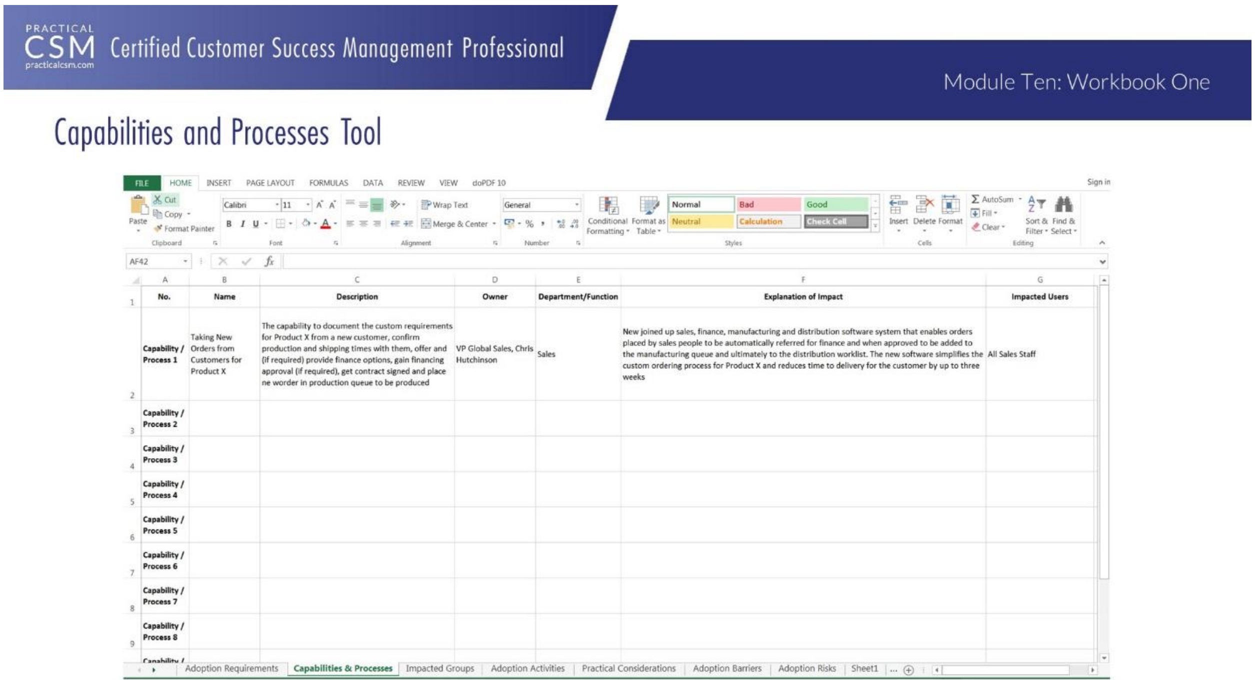


The Onboarding Work Plan Template is again in Microsoft Excel format and contains five worksheets, each sheet representing a phase of work within the overall project, with a space for each outcome for the phase to be clearly defined and explained. The plan itself then contains rows for activities, and each activity can be named and described in terms of what each activity is, who is responsible for performing it, how it will be accomplished, when it will start and end and what the outputs from the activity will be.

In Phase 4: Adoption Planning you have seven templates, namely the Adoption Requirements Questionnaire, the Capabilities and Processes Tool, the Impacted Groups Tool, the Adoption Activities Checklist, the Practical Considerations Template, the Adoption Barriers Questionnaire and the Adoption Risks Questionnaire. Because these are all single worksheets, they have been collected into one single workbook entitled “Phase 4 Adoption Planning Tools”.

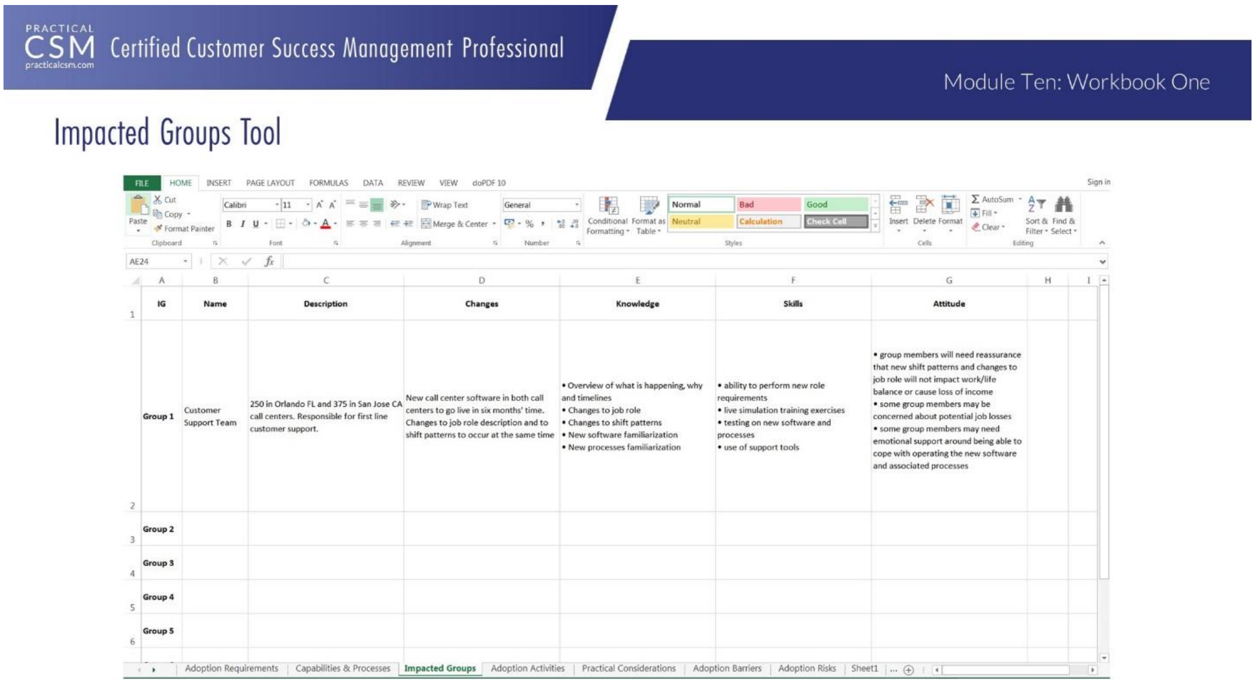


The Adoption Requirements Questionnaire is the first worksheet within the workbook. This provides a simple checklist of the most important information pertaining to a new adoption implementation project including that relating to objectives, managers, user groups, financing, measurements, reporting, and sign off.



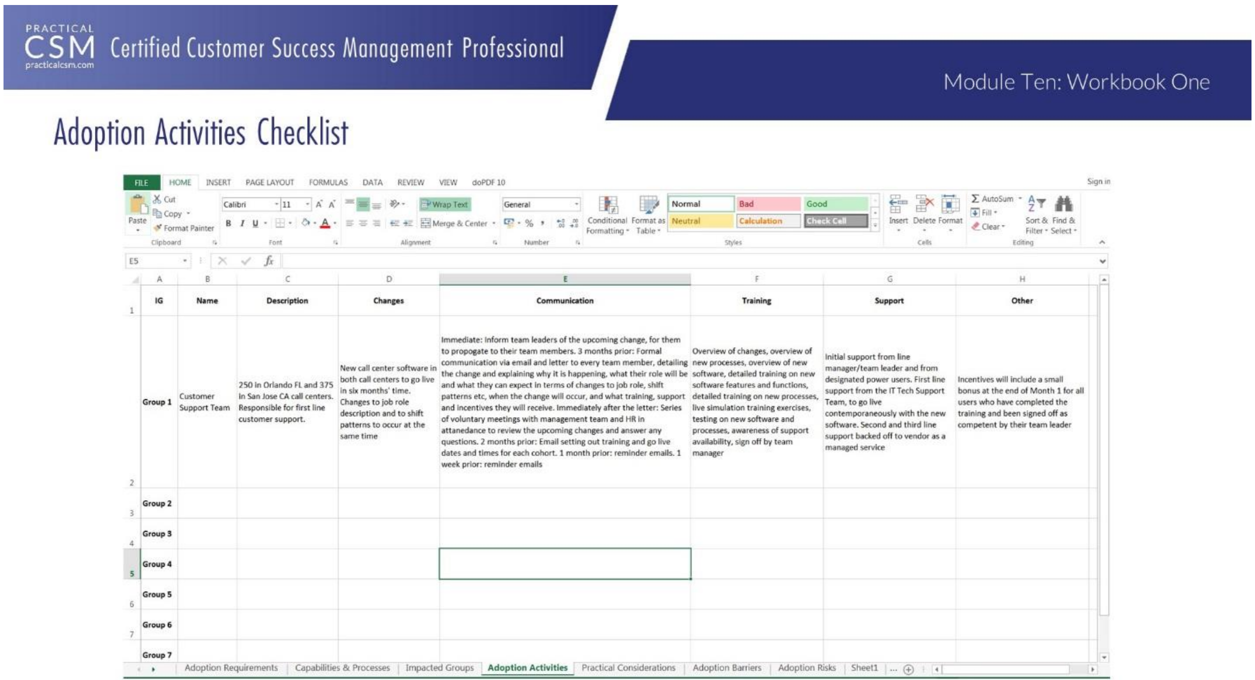
No.	Name	Description	Owner	Department/Function	Explanation of Impact	Impacted Users
Capability / Process 1	Taking New Orders from Customers for Product X	The capability to document the custom requirements for Product X from a new customer, confirm production and shipping times with them, offer and (if required) provide finance options, gain financing approval (if required), get contract signed and place ne worder in production queue to be produced	VP Global Sales, Chris Hutchinson	Sales	New joined up sales, finance, manufacturing and distribution software system that enables orders placed by sales people to be automatically referred for finance and when approved to be added to the manufacturing queue and ultimately to the distribution worklist. The new software simplifies the custom ordering process for Product X and reduces time to delivery for the customer by up to three weeks	All Sales Staff
Capability / Process 2						
Capability / Process 3						
Capability / Process 4						
Capability / Process 5						
Capability / Process 6						
Capability / Process 7						
Capability / Process 8						

The Capabilities and Processes Tool is a great way to list out and record the necessary information about all capabilities that will be impacted by the initiative and that therefore contain processes that will be changed by the initiative in some way. Each capability can be given a name and a description, and then the capability or process owner and the department or functional area can be stated. The nature of the impact can then be described, and the users who will be impacted can be listed.



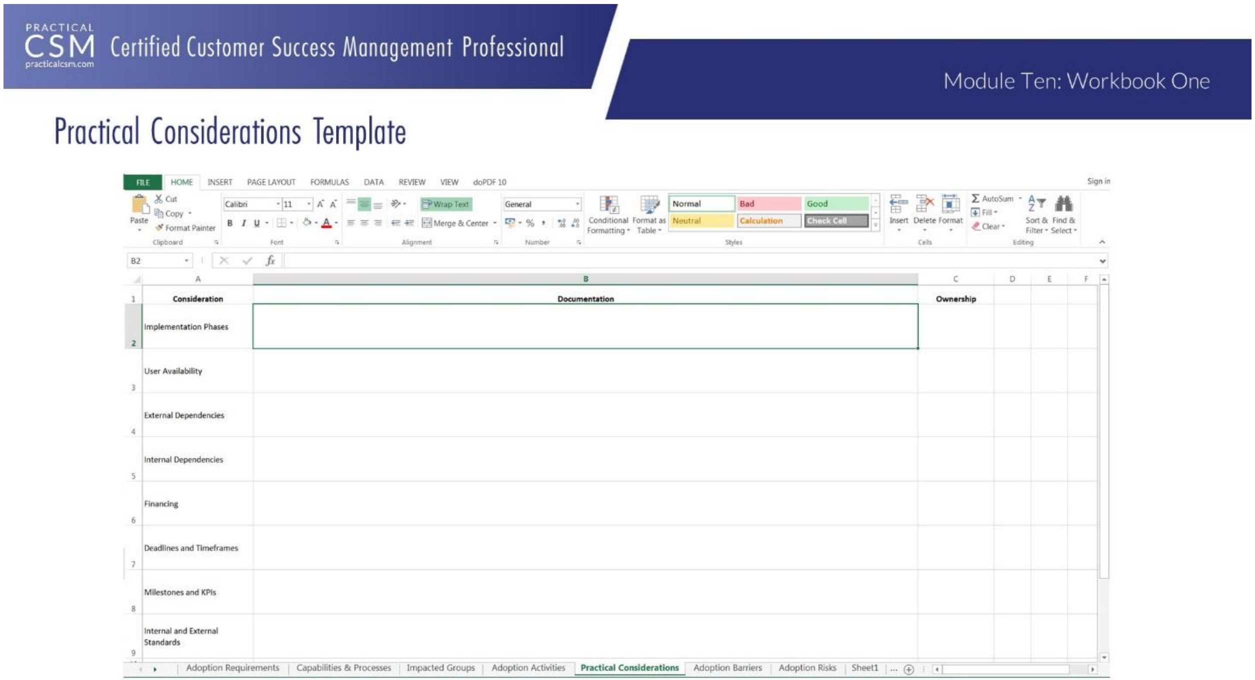
IG	Name	Description	Changes	Knowledge	Skills	Attitude
Group 1	Customer Support Team	250 in Orlando FL and 375 in San Jose CA call centers. Responsible for first line customer support.	New call center software in both call centers to go live in six months' time. Changes to job role description and to shift patterns to occur at the same time	• Overview of what is happening, why and timelines • Changes to job role • Changes to shift patterns • New software familiarization • New processes familiarization	• ability to perform new role requirements • live simulation training exercises • testing on new software and processes • use of support tools	• group members will need reassurance that new shift patterns and changes to job role will not impact work/life balance or cause loss of income • some group members may be concerned about potential job losses • some group members may need emotional support around being able to cope with operating the new software and associated processes
Group 2						
Group 3						
Group 4						
Group 5						

The Impacted Groups Tool is provided as a way to separately list out each impacted group (both direct and indirect) in order to analyze, discuss and document the adoption requirements for each group. As well as columns for the group's name and description, there is a column to describe the changes that the group will undergo, then the final three columns are used to define the group's Knowledge, Skills and Attitude change management requirements.

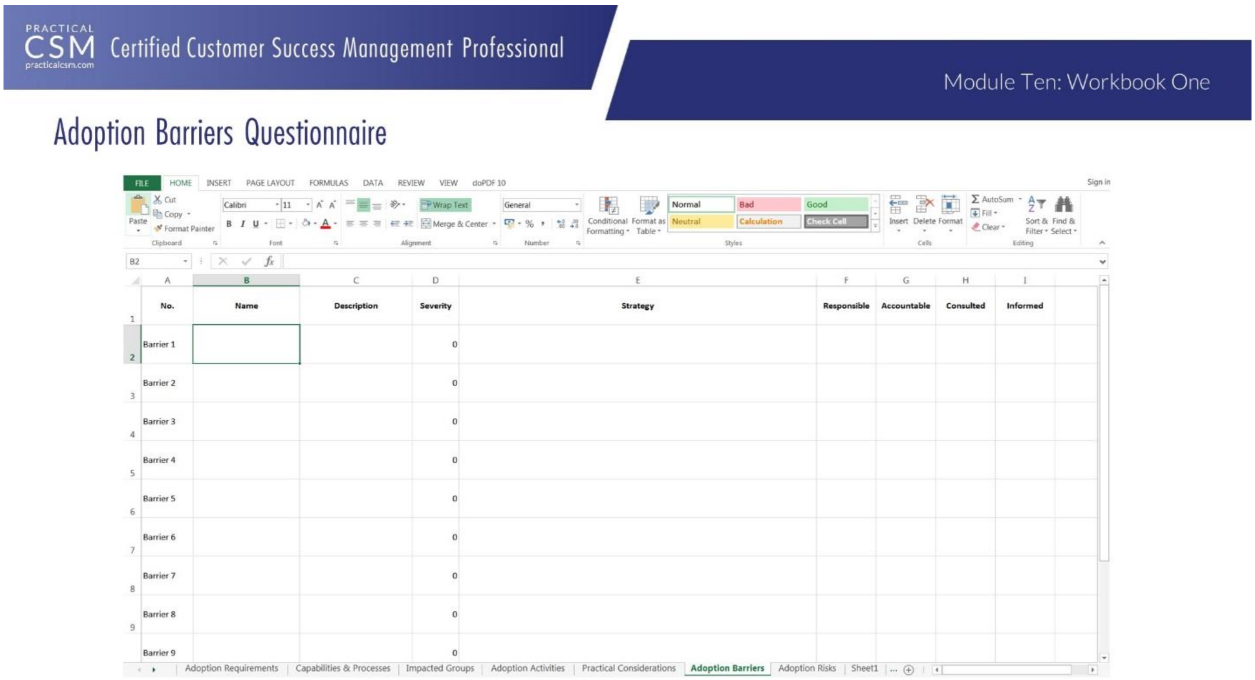


IG	Name	Description	Changes	Communication	Training	Support	Other
Group 1	Customer Support Team	250 in Orlando FL and 375 in San Jose CA call centers. Responsible for first line customer support.	New call center software in both call centers to go live in six months' time. Changes to job role description and to shift patterns to occur at the same time	Immediate: Inform team leaders of the upcoming change, for them to propogate to their team members. 3 months prior: Formal communication via email and letter to every team member, detailing the change and explaining why it is happening, what their role will be and what they can expect in terms of changes to job role, shift patterns etc, when the change will occur, and what training, support and incentives they will receive. Immediately after the letter: Series of voluntary meetings with management team and HR in attanedance to review the upcoming changes and answer any questions. 2 months prior: Email setting out training and go live dates and times for each cohort. 1 month prior: reminder emails. 1 week prior: reminder emails	Overview of changes, overview of new processes, overview of new software, detailed training on new software features and functions, detailed training on new processes, live simulation training exercises, testing on new software and processes, awareness of support availability, sign off by team manager	Initial support from line manager/team leader and from designated power users. First line support from the IT Tech Support Team, to go live contemporaneously with the new software. Second and third line support backed off to vendor as a managed service	Incentives will include a small bonus at the end of Month 1 for all users who have completed the training and been signed off as competent by their team leader
Group 2							
Group 3							
Group 4							
Group 5							
Group 6							
Group 7							

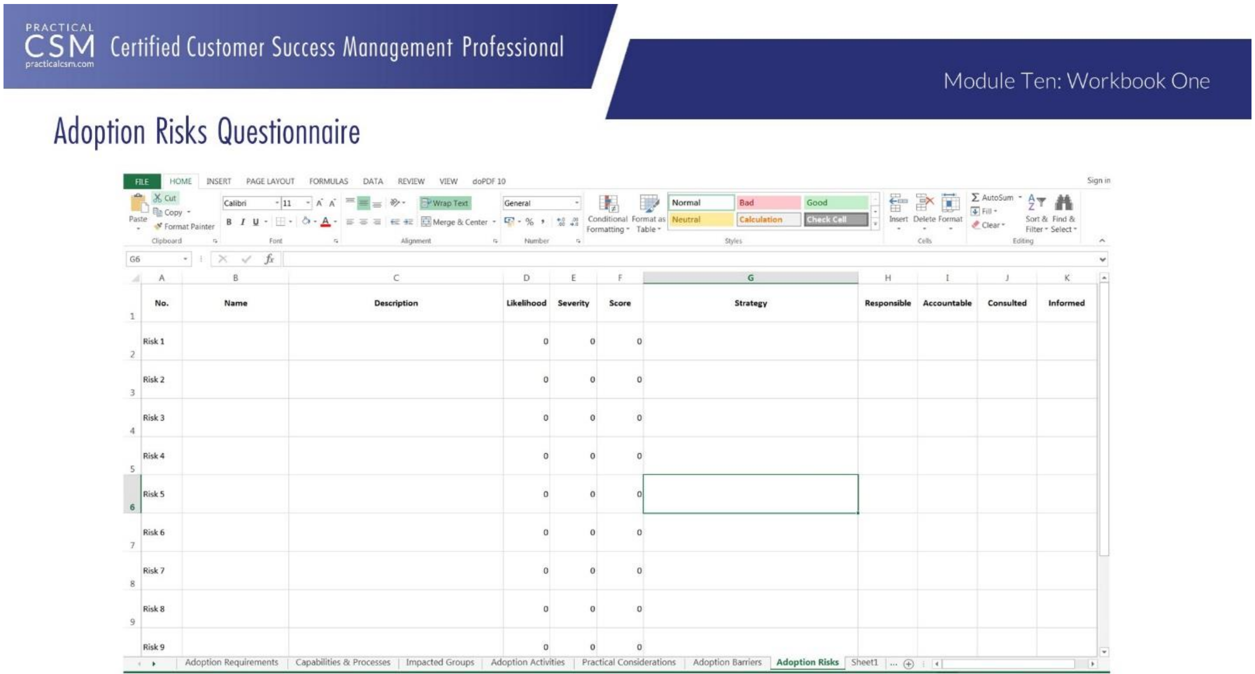
The Adoption Activities Checklist is again based upon user groups, however whilst the previous sheet listed each group's needs, this worksheet lists the actual activities that will take place within the adoption implementation plan to ensure those needs are met. The format of the worksheet is similar except that instead of KSA requirements, the sheet lists Communication, Training and Support activities.



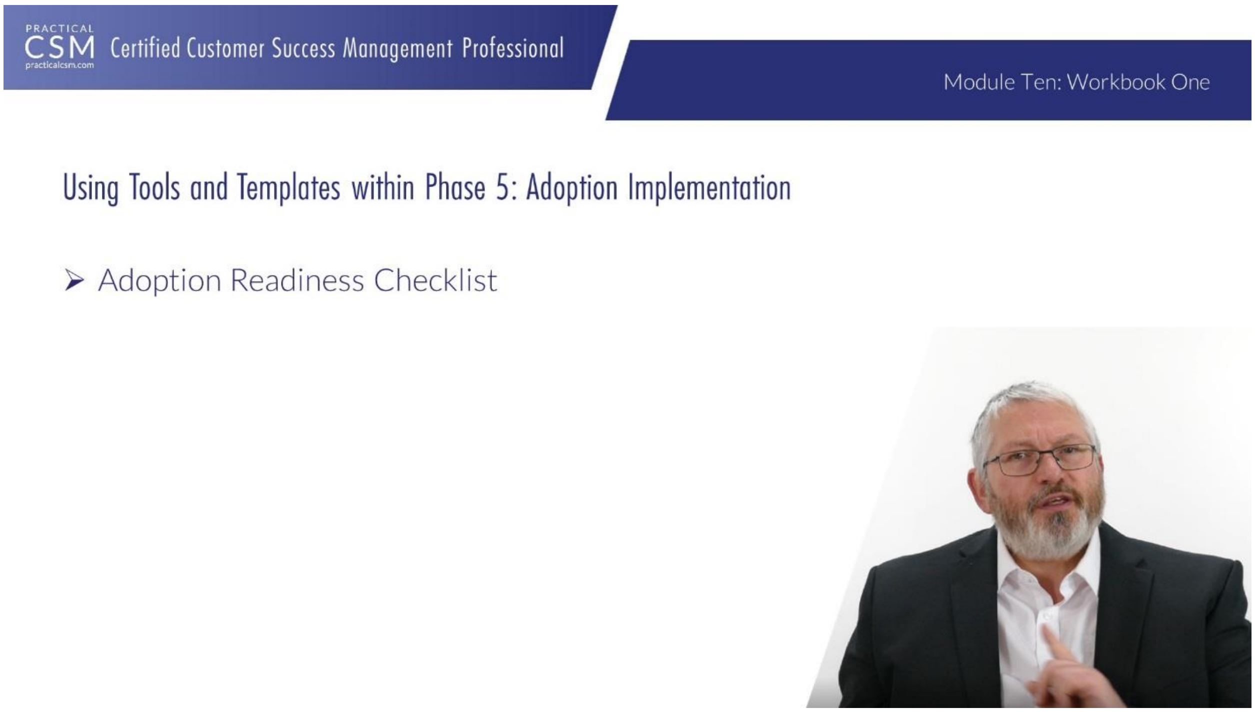
The purpose of the Practical Considerations Template is to record whatever challenges come up during the adoption planning process, so that they are dealt with appropriately. CSMs will need to list the practical considerations that are appropriate to their own customers' adoption initiatives, but the template worksheet lists eight standard considerations that are commonly applicable to most adoption projects, ranging from implementation phases through to internal external standards to be applied.



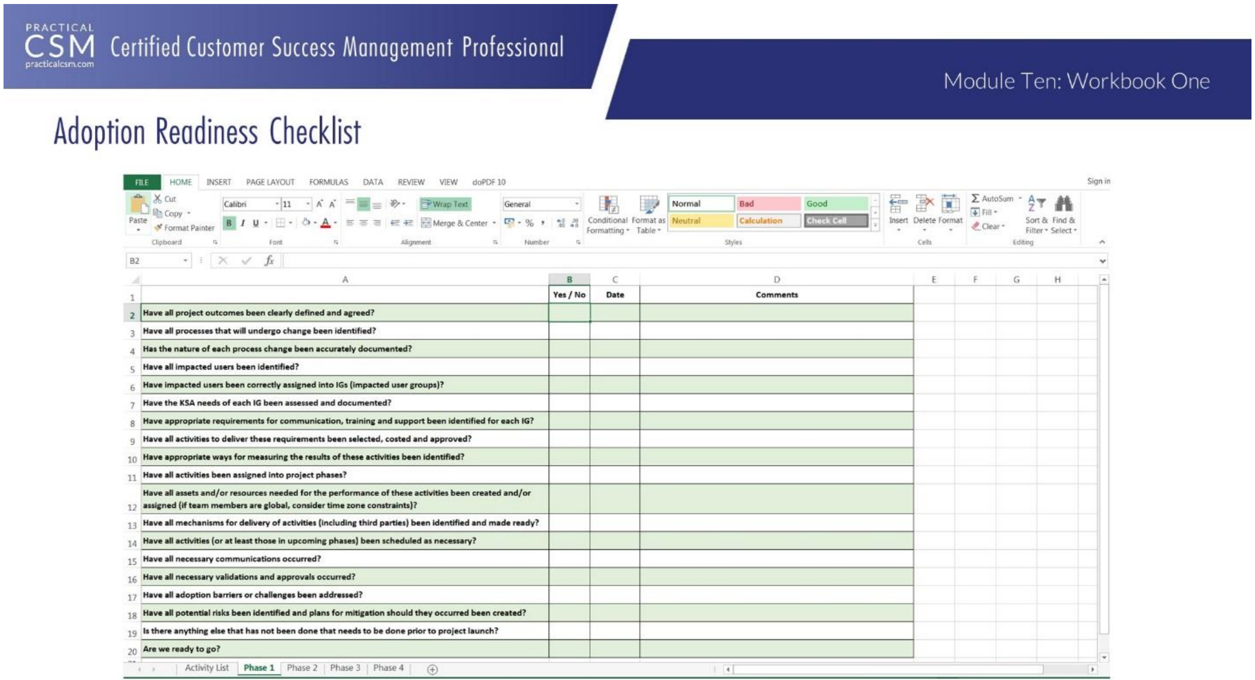
The Adoption Barriers Questionnaire is the next worksheet in the workbook. This one is of course designed to enable CSMs to both document the specific barriers that arise during the adoption implementation planning process and then decide upon the severity of each one, following which the CSM and other stakeholders can debate, agree and document the actions that will be taken to overcome or work around the barrier.



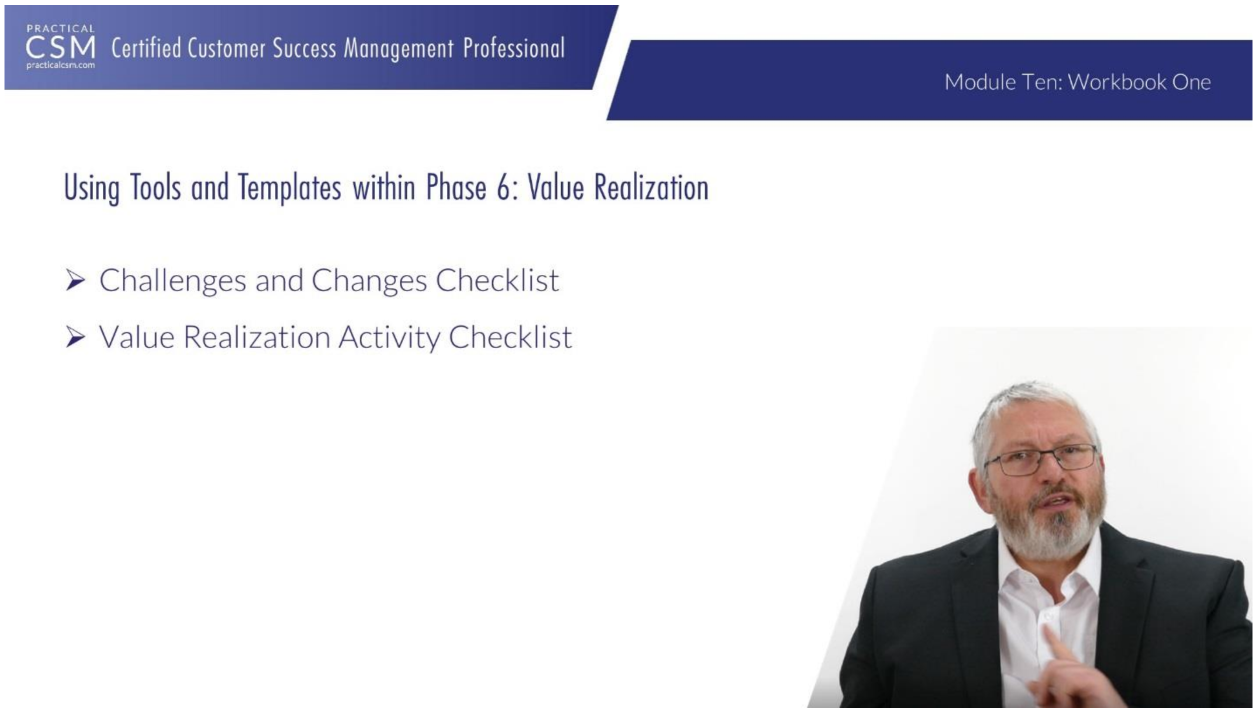
Finally the Adoption Risks Questionnaire allows CSMs to follow much the same process as for barriers but this time for risks. The difference between the two of course being that rather than just a straight severity rating, risks are provided with both a “likelihood of occurrence” *and* a “severity” rating, and then the overall score for each risk is determined by adding the two ratings together.



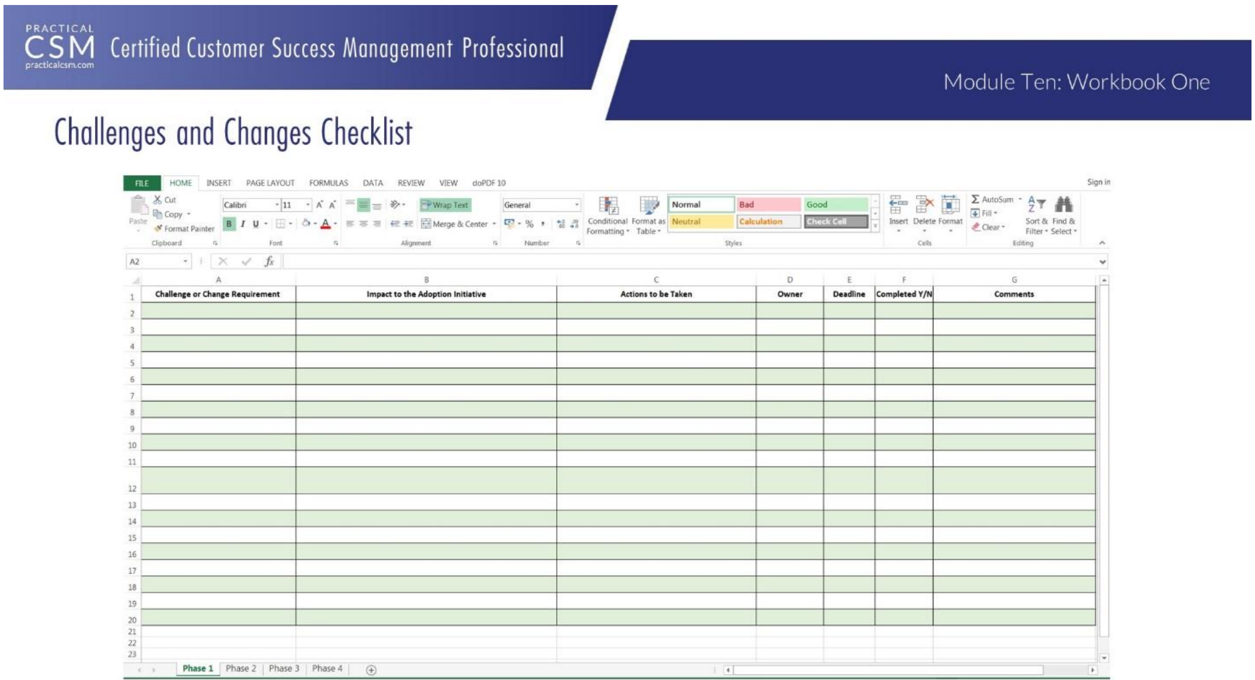
There is just on template for Phase 5: Adoption Implementation, and this is the Adoption Readiness Checklist.



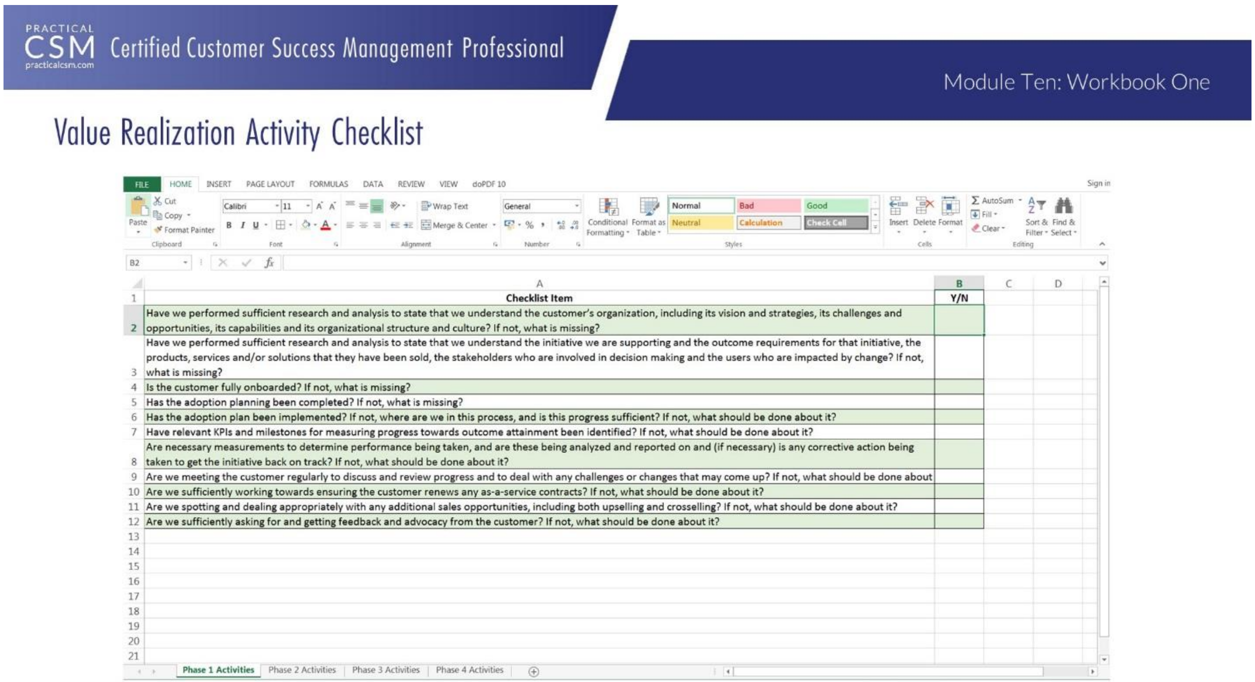
The Adoption Readiness Checklist is a checklist that the CSM can use to make sure everything is ready to go for each phase of the adoption implementation plan. The CSM will need a separate copy of the checklist for each phase. Four are provided within the workbook by default, but the CSM can easily add others by making copies of the existing ones as necessary. Each checklist provides nineteen common questions for the CSM to check off to ensure everything is good to go, plus of course the CSM can add their own checklist items to this list as required.



In Phase 6: Value Realization there are two tools, these being the Challenges and Changes Checklist and the Value Realization Activity Checklist.



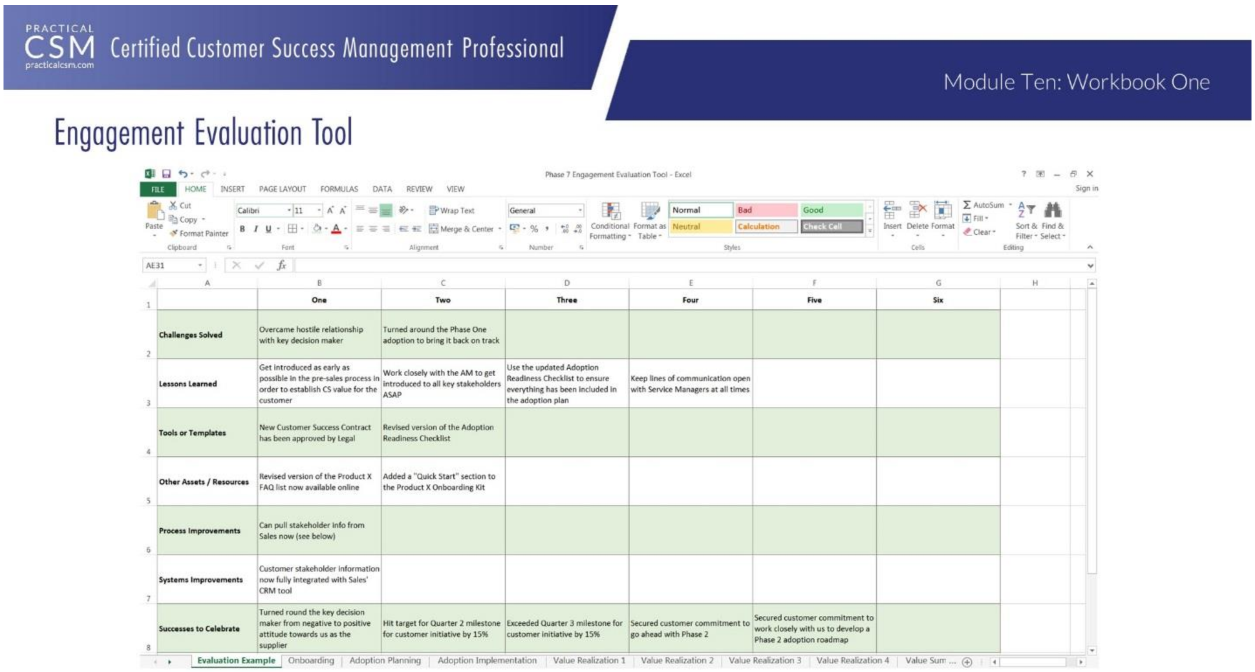
The Challenges and Changes Checklist is intended as a way to keep a record of the challenges and other change requirements that are not known about during the previous planning phase and that instead only show themselves during this phase when the adoption project has gone live. Many issues can be thought through in advance and prepared for, but inevitably sometimes concerns or needs just don't get revealed until the implementation is under way, and as soon as they come up, the CSM can use this checklist to record them, describe their impact, define the actions to be taken to mitigate the problem or affect the change, ascribe an owner and a deadline for the action and specify when the issue has been successfully dealt with.



	Checklist Item	Y/N
2	Have we performed sufficient research and analysis to state that we understand the customer's organization, including its vision and strategies, its challenges and opportunities, its capabilities and its organizational structure and culture? If not, what is missing?	
3	Have we performed sufficient research and analysis to state that we understand the initiative we are supporting and the outcome requirements for that initiative, the products, services and/or solutions that they have been sold, the stakeholders who are involved in decision making and the users who are impacted by change? If not, what is missing?	
4	Is the customer fully onboarded? If not, what is missing?	
5	Has the adoption planning been completed? If not, what is missing?	
6	Has the adoption plan been implemented? If not, where are we in this process, and is this progress sufficient? If not, what should be done about it?	
7	Have relevant KPIs and milestones for measuring progress towards outcome attainment been identified? If not, what should be done about it?	
8	Are necessary measurements to determine performance being taken, and are these being analyzed and reported on and (if necessary) is any corrective action being taken to get the initiative back on track? If not, what should be done about it?	
9	Are we meeting the customer regularly to discuss and review progress and to deal with any challenges or changes that may come up? If not, what should be done about	
10	Are we sufficiently working towards ensuring the customer renews any as-a-service contracts? If not, what should be done about it?	
11	Are we spotting and dealing appropriately with any additional sales opportunities, including both upselling and crosselling? If not, what should be done about it?	
12	Are we sufficiently asking for and getting feedback and advocacy from the customer? If not, what should be done about it?	

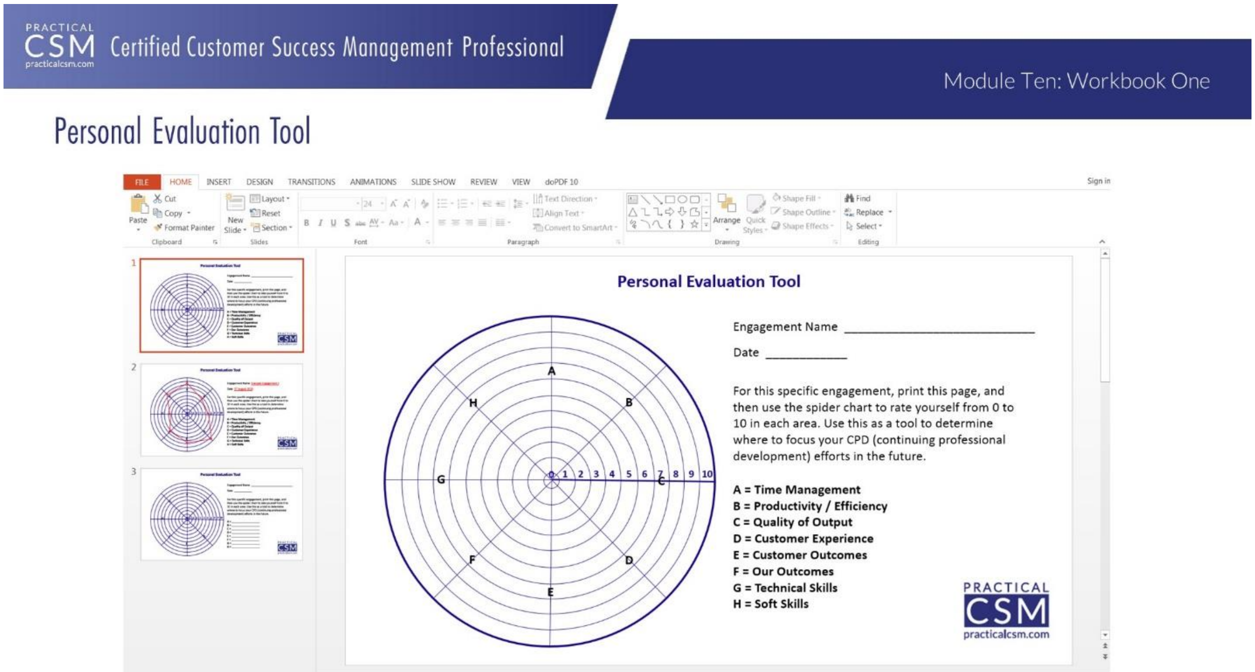
The Value Realization Activity Checklist is another very simple tool. This one lists 11 criteria that the CSM and other stakeholders can tick off to ensure they have performed all the necessary activities to ensure that value is being realized by the customer engagement. The checklist has been provided for four phases of a multi-phased adoption implementation and of course the CSM can copy one of the sheets to create additional checklists for more phases if necessary.

In Phase 7: Engagement Evaluation there are three tools, namely the Engagement Reporting Checklist, the Engagement Evaluation Tool and the Personal Evaluation Tool.



	One	Two	Three	Four	Five	Six
Challenges Solved	Overcame hostile relationship with key decision maker	Turned around the Phase One adoption to bring it back on track				
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		
Tools or Templates	New Customer Success Contract has been approved by Legal	Revised version of the Adoption Readiness Checklist				
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				
Process Improvements	Can pull stakeholder info from Sales now (see below)					
Systems Improvements	Customer stakeholder information now fully integrated with Sales' CRM tool					
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	

The Engagement Evaluation Tool is a checklist of items to review for each phase of the engagement from Phase 1: Preparation through to Phase 6: Value Realization. Items to document include challenges encountered, tools and templates changed or added, lessons learned for the future, improvements that need to be made, and most important of all, successes to celebrate.



The Personal Evaluation Tool provides a graphical way to review your own personal performance and determine where to focus your efforts on CPD (continuing professional development) to get the maximum results. The tool uses a spider diagram to pictorially show the relative strengths and weaknesses of your performance throughout the engagement in eight areas ranging from time management through to soft skills. Each area can be rated from 0 to 10 and then lines can be drawn between the ratings to create the diagram itself.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