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Module Three:
Practical CSM Framework Phase 1: Preparation
Workbook Two

Welcome back to Module Three of the PracticalCSM.com Certified Customer Success Management Professional training course. As you know, this is the first Module that has covered one of the Phases of the Practical CSM Framework, in this case Phase One: Preparation.

In Workbook One we discussed the importance of a joined up approach that provides a seamless service to customers and we looked at the role of the CSM in contributing to this. We discussed the sources that CSMs might go to for information and the decision process around selecting what to research and what to validate. Finally, we reviewed the different areas or categories of information that CSMs will need to conduct research into.

In this Workbook we're going to get very practical and we're going to focus on the specifics of what information to research and how to record it, and then on engagement planning.

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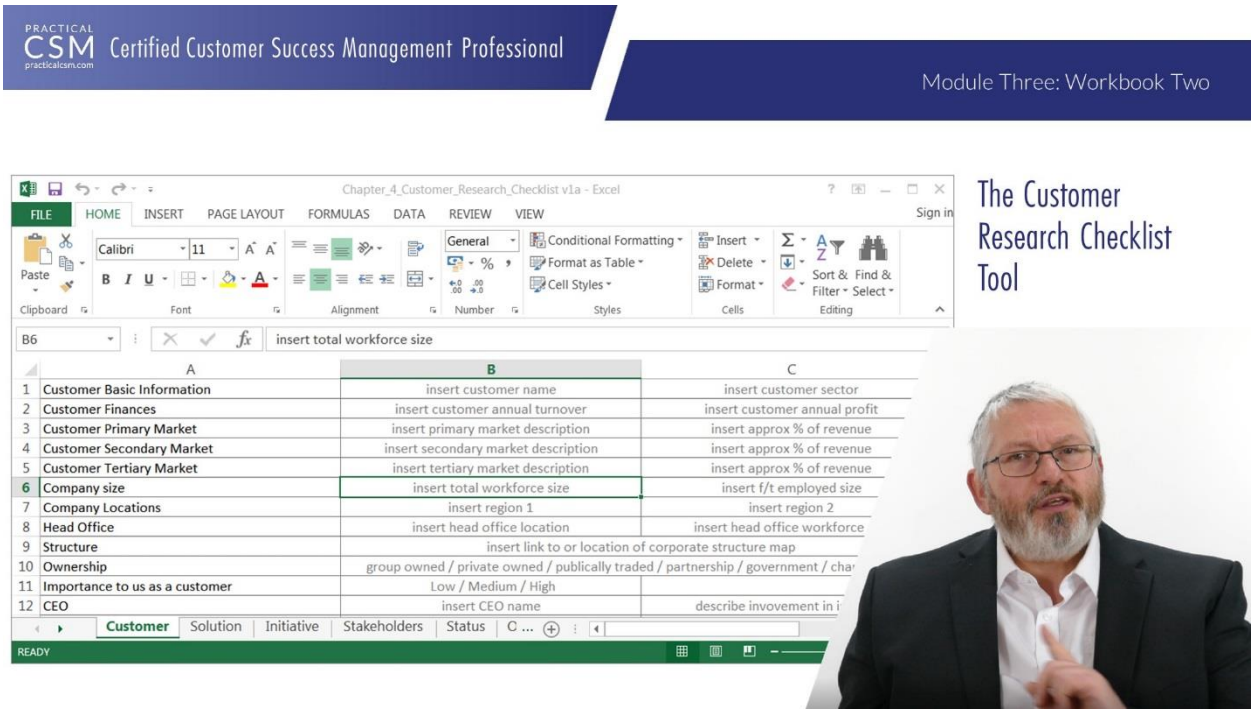
Practical CSM Framework Phase 1: Preparation – Workbook 2 Agenda

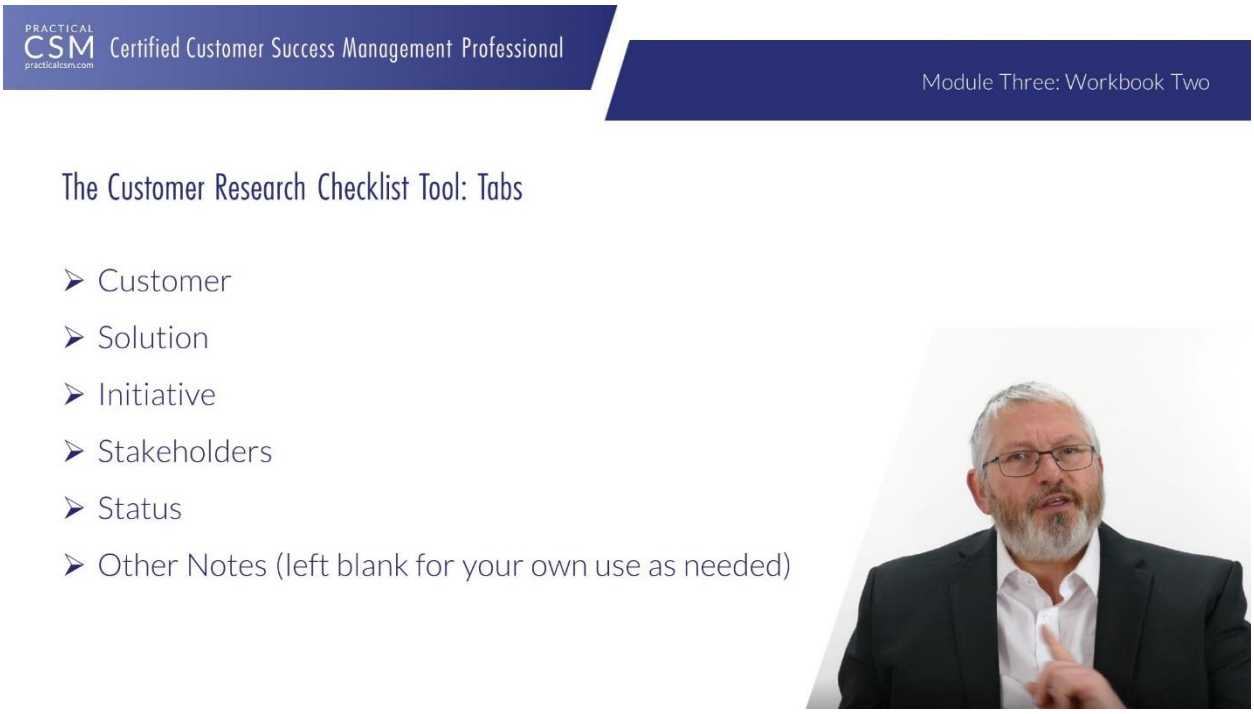
- The Customer Research Checklist Tool
  - Customer
  - Stakeholders
  - Solution
  - Status
  - Initiative and Outcomes
- Engagement Planning
  - Creating an Engagement Strategy
  - Creating an Engagement Roadmap

In Workbook Two we will be covering just two topics. Firstly, researching engagement-related information relating to the Customer, Solution, Initiative and Outcomes, Stakeholders and Engagement Status, using the Customer Research Checklist Tool, and secondly engagement planning, where we will be looking at creating an Engagement Strategy using the Engagement Strategy Tool and an Engagement Roadmap using the Engagement Roadmap Tool.



Workbook 1 in this Module described the different areas of information that the CSM will need to research. In this video we will examine the Customer Research Checklist Tool, which is one of the tools that is provided as a download for readers of the book *Practical Customer Success Management*. There is no hard requirement for CSMs to use this tool, and it is entirely up to the CSM or their department's policies and procedures to determine the best way to document all data. If the CSM has a software system that already centrally stores this type of information and which therefore enables others to access it and amend it as necessary then this is likely to be a better option for recording the research information. If there is no centralized software system and the CSM decides to use the Customer Research Checklist Tool then they should still store the file in a Central storage area that other team members have access to. Remember also that there may be sensitive information relating to customers that is being recorded, and CSMs must therefore take care to only store such data in a manner which conforms to their company's data storage policies and procedures.

If you have not already downloaded the Customer Research Checklist Tool, I suggest you pause this video and do so now, and then have it open in front of you to view as we discuss it.



The Customer Research Checklist Tool is created as a workbook in the Microsoft Excel® format. It has a series of six worksheets within it which can be thought of as categories or headings under which you will record the information you uncover. Each worksheet has a tab at the bottom which you select to bring that worksheet to the front. The tabs are as follows:

- Customer
- Solution
- Initiative
- Stakeholders
- Status
- Other Notes (left blank for your own use as needed)

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The Customer Research Checklist Tool: Customer Tab

- Basic Information
- Senior Leadership Team
- Department and Function Heads
- Other Information

In the *Customer* tab you will find places to store customer-related information including basic information such as the customer's company name and industry, financial and market related information, their size, the location of their HQ, the regions they operate in and their corporate structure and ownership.

You will then see spaces available to record the names of the senior leadership team and note any connections they have to the initiative you are engaged to help them with. Some of the senior leadership titles may need changing (for example instead of the title *Chief Sales & Marketing Officer*, your customer might use the title *VP Sales & Marketing*), and there are some additional rows marked "Other CxO" for you to use to record information relating to other senior leaders whose titles are not explicitly shown above.

After this you will see spaces available to record the names of department and/or function heads and again note any connections they have to the initiative you are engaged to help them with. As with the senior leaders, some of the titles may need changing and there are some additional rows marked "Department Head 1, 2 etc" for you to use to record information relating to other department or functional heads whose titles are not explicitly shown above.

Beneath this are some additional rows available for you to store any other information relating to the customer's company. For example if you have created any tools such as a PESTLE Analysis, or a Porter's Value Chain Analysis then you might wish to document where these models can be found.

The *Solution* tab is where you store information relating to the products and/or services that your company has sold the customer. If there is just one overall product, service or solution name then this can be recorded in the first row. If not then you will need to give it some sort of name, which can just be something like *X Solution for Y* where "X" is the initiative and "Y" is the customer's name. An example would be: "*Lathe Automation Upgrade for Faith & Fuller Engineering Ltd*".

The next few rows of the *Solution* tab provide spaces to store the names of people within your own organization who are also involved in the initiative, including the Account Manager, engineers, product specialists, and so on.

The next rows are designed for recording the separate components of more complex solutions where multiple products and/or services have been combined to create the overall solution. This may or may not be the case for your situation so if this is not relevant to you then by all means either leave the rows blank or delete them. There are rows for products, professional services and managed services. Different companies might use the terms *professional services* and *managed services* differently, or use different terms entirely, or simply not differentiate between different types of services. I think it is useful to differentiate between the two, and the way I recommend to use the terms is as follows.

Professional Services should refer to a specific, one-off intervention that has a defined beginning and end and which produces a result of some kind – commonly though not always a report with recommendations. Examples of this might be pre-sales activities such as a wireless access site survey service, an energy efficiency audit, or a security analysis. It could also refer to paid-for post sales

activities such as customization or integration work, adoption and change management work, or end user training and certification work.

Managed Services should be used to refer to any ongoing services that take over the management, maintenance, support or other running of a particular capability, and perform those duties on behalf of the customer on an ongoing basis – usually renewed on an annual service contract. Examples of this might traditionally be things like software and/or data hosting, end user support, and so on. However in this day and age, pretty much *any* business capability could be provided as a managed service – for example HR, Finance, security, IT and so on.

What the two types of service have in common is that both Managed and Professional Services are generally speaking going to be paid-for services that are separately billable or appear as their own line items on a longer bill of materials or other invoice.

Your particular organization will of course have its own portfolio of products and/or services which might fit the above model in certain ways and be slightly different in others. Perhaps for example you only sell services and not products, or perhaps you sell just one major product and then offer a range of professional *and* managed services as additional value-add options for the customer to choose from. The point is of course that again you may need to adapt this section to fit your corporate profile, and then use it accordingly for each actual customer engagement.

There are also three specific rows, one each for customization, integration and configuration because these may or may not be included within the “deal price” but are of particular interest to customer success managers and should always be understood and specified to a sufficient depth of detail. This is because any customization, integration and configuration work is likely to have an impact on how the products and/or services function and how they are used, which in turn of course means that their impact on the “generic” products or services is important to understand so that when it comes to onboarding, adoption and value realization these impacts are known about and dealt with.

The last parts of the *Solution* tab provide space for recording revenue information and also for recording any third party products and services which are also included as part of the overall solution that your company has sold the customer and which again therefore will need to be considered within the customer success manager’s onboarding, adoption and value realization activity planning.

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The Customer Research Checklist Tool: Initiative Tab

- Used to record the customer's initiative
- Some customer initiatives are purely tactical in nature
- Some customer initiative support one business strategy
- Some customer initiatives support multiple strategies
- It is important to capture as much as possible about what strategies the initiative supports for future reference at the value realization phase

The third tab is the *Initiative* tab. This tab is of course designed to enable CSMs to record information relating to the customer's initiative – in other words what it is that they are doing, why they are doing it and how they are going about getting it done. What it is important to remember is that this tab is meant to be used to record the *customer's* initiative, not anything related to the CSM's own company's strategies and tactics.

Some customer initiatives are purely tactical – for example the replacement of old equipment with newer, more efficient equipment that does basically the same job might fall into this category. Other customer initiatives may be more – sometimes much more – strategic in their nature, or even if not that strategic themselves, form a small part of a wider strategic initiative.

Going back to the example of replacing the old equipment with new, more efficient equipment. Perhaps as well as doing basically the same thing but more efficiently, this new equipment is equipped with IoT (Internet of Things) sensors that can send digital information to a central software system, which will enable remote and automated monitoring of equipment to respond more quickly to or even predict ahead of time any equipment malfunctions or failures, so that engineers can be called out to fix problems more quickly or even replace faulty equipment ahead of failure to prevent the failure ever happening. In this example, the replacement of the old equipment for new is not just a tactical "equipment refresh" but also supports a much larger corporate "digitalization" strategy that enables greater productivity across the customer's entire production operation.

Perhaps at the same time, these IoT sensors enable monitoring of load and of energy consumption and facilitate automated slowdown or even shutdown of equipment when it is under-utilized, and perhaps *this* functionality is part of another wider strategy relating to cost efficiency.

The specific initiative you are working on may therefore not support any wider strategy at all, or support one specific strategy or even multiple strategies. Whatever the case, the CSM needs to do all they can to learn what (if any) business strategies the customer's initiative supports, since knowing this information is extremely useful when it comes to the value realization stages of the engagement.

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The Customer Research Checklist Tool: Stakeholders Tab

- Senior Project Lead (SPL)
- Budget Holders
- Other Key Stakeholders
- Other Non-Key Stakeholders
- Stakeholders from the CSM's company
- Stakeholders from Third Parties

The fourth tab is for stakeholder information. The first rows record information relating to customer stakeholders, starting with the Senior Project Lead or SPL. This is the name I give to identify the person within the customer's organization who has the primary or lead responsibility for the initiative itself, or at least for liaising with the CSM's company and managing those aspects of the initiative that relate to the solution that the company has sold them.

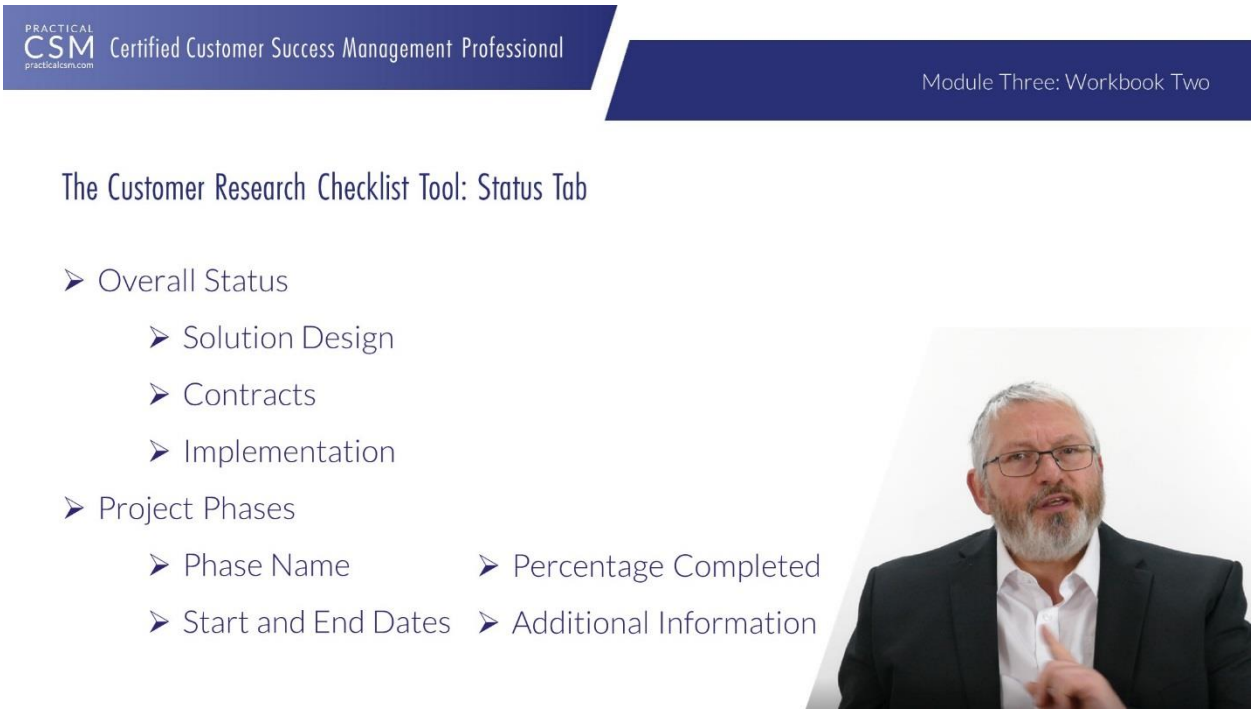
After this comes rows for budget holders, ie those who have provided all or a part each (if multiple) of the funding for the initiative and who therefore are likely to be interested in tracking and measuring financial outcomes from it.

After this is space for other key stakeholders, by which I mean those people who are not financing the initiative and are not the SPL but who *are* important from a management and decision making perspective. This would typically include heads of departments or owners of high or mid level business functions whose staff and/or capabilities will be significantly impacted by the initiative.

After the key stakeholders comes rows for other directly and then indirectly impacted stakeholders. These stakeholders are not *key* stakeholders because they are not involved in any management or decision making capacity within the initiative, but still need to be known since again their staff and/or capabilities will be impacted in some way. You may wish to refer back to the relevant chapters in the book or previous video if you need to refresh yourself on the difference between directly and indirectly impacted stakeholders.

After this comes a whole range of rows for recording everyone within the CSM's own company who has any involvement in the initiative, including involvement relating to sales, planning, consulting, installing, customizing, managing, supporting, training and so on.

Finally there are some additional rows for documenting any third party stakeholders that it might be useful and/or important for the CSM to be aware of. This might include people from companies that have supplied products and/or services for the customer's initiative that will integrate with or work alongside the CSM's company's solution components, or other third parties such as business consultants, change management professionals or subject matter experts who have been brought in to assist with the initiative in some capacity.



Aside from *Other Notes* which is a blank worksheet that you can use for any purpose of your own, the final worksheet is called *Status*. The purpose of this worksheet is to record the current progress within the initiative so that the customer success manager (and others that the CSM reports to about the initiative's progress) is aware of how far through the initiative's lifecycle the initiative currently is, including what *has* been done, what is *currently* been done and what *needs* to be done next.

The first three rows are about overall statuses, and these relate to the status of the solution design, the status of the contracts, and the status of the overall implementation. Generally speaking, CSMs might be brought in earlier than the completion of these three items in order to provide a seamless and joined up customer experience and to enable the customer success manager to prepare for their own role in helping the customer with onboarding, adoption and value realization processes, but the bulk of their involvement will kick off once the design is completed, contracts have been signed and the solution is in place and ready or at least soon to be ready for use.

Many (though by no means all) initiatives are divided into a number of smaller phases, where the solution is implemented for example one department or one geographical location at a time, in order to minimize disruption or to facilitate ongoing productivity or simply for cash flow or capacity for change management reasons. If this is the case then it may be that these phases run in serial (ie where Phase 1 is completed before moving to Phase 2, etc) or in parallel (ie where several or even all phases are commenced simultaneously). If the former is the case then the initiative will only have one "live" phase at any time. If the latter then multiple or even all phases might be "live" simultaneously, but it might not

always be the case that every phase is at the same stage in its lifecycle at the same time, since some phases may be more complex or larger or less well resourced than others.

The *Status* worksheet therefore allows CSMs to record progress separately for just Phase One (if the initiative is not broken down into multiple phases at all) or other phases either one-by-one or simultaneously as necessary. Only three phases are provided for out of the gate, but of course the CSM can copy and paste rows to create as many additional phases as they require.

For each phase, the CSM is able to record its name plus start and end dates, percentages completed and further comments for that phase's installation, configuration, integration, managed services provisioning, onboarding, adoption, utilization and KPI measurement and reporting. Rows that relate to things that are not required (eg perhaps there is no "integration") can simply be left blank or deleted. And of course CSMs can add in further rows for other phase-related activities that they also wish to record progress for, but which do not feature in the standard checklist.

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The Customer Research Checklist Tool: Utilization

- The CSM will learn everything about the engagement during Practical CSM Framework Phase 1: Preparation
- The Customer Research Checklist is a "work in progress"
- The CSM must determine how much information and what information is "enough" at any stage
- The CSM must also determine what information needs validating and when this needs to be done

As the book *Practical Customer Success Management* explains, it is unlikely – generally impossible even – for the CSM to be able to complete all of the necessary research to learn everything possible about the engagement during Practical CSM Framework Phase 1: Preparation. In any case as we have previously discussed it may even not be desirable for the CSM to do so, since it would not be the best way for them to utilize their time. CSMs should therefore view the Customer Research Checklist as a "work in progress" throughout at least the early stages if not the entirety of the engagement, rather than a job that should be completed by the end of this first phase.

It is up to you as the CSM to determine how much information and what information is "enough" to enable you to move on with confidence to the next task – engagement planning.

Finally, it is also worth reiterating that some information may at first be assumptions or even speculations that may require validation either straight away or at some later stage. CSMs might decide to color code such information so they can easily spot it. For example information in orange might denote information that is assumed and that will need validation in the future but is "good enough" for now, and information in red might denote information that is assumed and that will need validation straight away in order for important decisions to be made or activities to commence.

Whenever you attempt to perform a task that's more complicated than just a few simple steps performed by yourself alone or a very small group of people, it's a good idea to first of all create a plan. The benefits of planning are twofold. Firstly, the result you get at the end will likely be superior, since the plan will ensure you are doing the right things in the right order to get the desired result and will keep you on track to doing so. Secondly, your efficiency will be improved, since at each step of the way the plan will help to focus you onto doing just the things that need to be done, and you will be able to move continually forwards without constantly having to stop in order to work out what to do next and how to do it. Essentially, if the project is a complex one, and if you want to make sure you get the best results from your activities, using the least time, resources and effort to do so, then you really should be creating a plan first before you start work on anything else.

Plans aren't always perfect. It may well be the case that as you follow your plan to perform a complex task, you encounter unexpected challenges that you had not known about beforehand during your planning phase, and so you need to adapt your plan to deal with these challenges. This is normal and to be expected, but it doesn't mean that your plan was a poor one. Applying the 80/20 rule we might say that we should expect a reasonably well devised plan to get us 80% of the way there, but the other 20% we will have to improvise as we go along. This should not however be taken as an excuse for not performing planning activities.

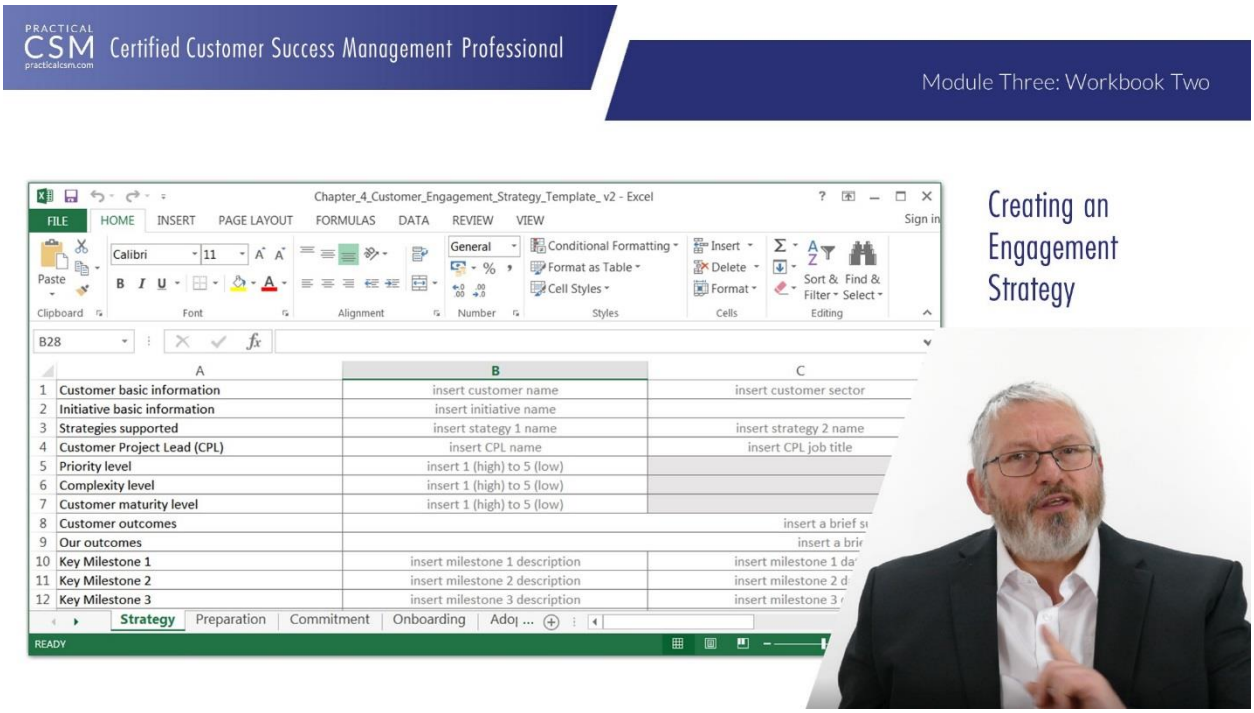
Engagement planning is the process of determining firstly what it is that the customer success manager wants or needs to achieve for the customers and for themselves from a particular customer engagement

(ie goals and objectives), and secondly how they will go about achieving those things (ie strategies and tactics).

The engagement planning tool that is provided within the *Practical Customer Success* Management book is the Engagement Strategy tool. Notice that the creation of an Engagement Strategy should not be too onerous a task and should not take you a lot of time and effort to create. That is because for the detailed breakdown of exactly what to do and how to do it at each step of the way you *already have a plan* and a very detailed one indeed in the form of the Practical CSM Framework itself.

So if we already have the Practical CSM Framework to follow, why do we need an engagement strategy? The answer is simple. The Practical CSM Framework provides you with a highly structured and detailed but generic plan to follow and enables you to use customer success best practices together with pre-created tools and templates that will enable you to work productively and effectively to rapidly generate great outcomes for both customers and your own company. However, the Practical CSM Framework is generic and does not take into account any details pertaining to the specific customer's initiative or needs, nor for that matter your own organization's specific requirements.

So the purpose of also creating an Engagement Strategy specifically for each customer engagement is so that you can tailor your activities towards the particular requirements of that engagement. However, because you already have a detailed best practice framework to follow in the form of the Practical CSM Framework, this additional, engagement specific planning need not be onerous to complete.



Before going further, we again recommend that you pause the video and get a hold of a copy of the Engagement Strategy tool to review as you follow along with the video. As stated, the engagement strategy is a high level plan of action that you have created for yourself to help you manage your activity within a particular customer engagement and to keep you on track with getting the results from that engagement that you and your company (and the customer) desire. This engagement strategy is part of the CSM's leadership role in that it will help to set direction not just for the CSM but for others who the CSM will work with and whom the CSM may need to bring on board in order to gain their assistance in working towards a common goal.

CSMs should kick off the engagement strategy planning process in Practical CSM Framework Phase 1: Preparation, but will need to go back to the planning process throughout the later phases to complete this work as more information is uncovered and with the help of others, especially the customer's Senior Project Lead (or SPL), whom you may recall is my title for the key stakeholder within the customer's organization who has the responsibility for making the initiative work and with whom the CSM works closely on an ongoing basis throughout the engagement.

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Component	Description
Priority Level	Rate from 1 to 5. Understanding what level of priority this customer engagement is compared with all others helps the CSM to allocate their time appropriately
Complexity Level	Rate from 1 to 5. Knowing how complicated the customer engagement is will give CSMs an idea of the amount of time the engagement might require
Customer Maturity Level	Rate from 1 to 5. Knowing how experienced and competent the customer is at adopting the type of solution your company has provided will give CSMs an idea of the amount of time the engagement might require
Customer Outcomes	The customer's outcome requirements with a description, a quantity and a deadline for each one
Your Outcomes	Your company's outcome requirements with a description, a quantity and a deadline for each one
Milestones & Measurements	Note any important milestones that have been stated by or agreed with the customer (or indeed that your own organization requires). Provide a description, a quantity and a deadline for each one

Creating an Engagement Strategy

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The idea of the priority level is to give the CSM a way to rank the importance of each customer engagement against all *other* customer engagements in order to gain a level of understanding as to how much time to use and how many resources to apply to this particular engagement compared to all the others. Time and resources are finite. If you are responsible as CSM for tens or hundreds or even thousands of customers then at any one time you are likely to have a large number of different customer engagements that need your attention. The more simultaneous customer engagements you need to manage, the less time and resources you have available for each one, and the more important it becomes to manage and prioritize your time.

Not all customer engagements are equal, and this can be for a variety of reasons. Some customer engagements are more important than others because of the amount of revenue they represent from a renewals or repurchasing perspective. Some customer engagements are more important than others because of the overall size and importance of the particular customer. Some customer engagements are more important than others because of the levels of profitability within the deal. And some customer engagements are more important than others because they help the CSM's company strategically by moving it closer towards the fulfilment of its long term goals. Of course there may be other reasons as well – for example there might be a great marketing case study opportunity if the initiative goes well, or it may be the first time a particular product or service is sold into a particular industry and it will be a valuable learning experience for all involved, and so on.

Of course the level of importance or priority is only one determinant of how much time and resources might be needed for a particular customer engagement. An idea of the overall level of complexity of each customer engagement is also helpful when planning time and resources, since more complex engagements are likely to require greater levels of these things than more simple engagements.

Again, the idea here is to help the CSM with planning the use of their time and resources, and also to an extent with expectation setting for themselves, their manager and their customers. A CSM who needs to spread their time and resources between multiple complex customer engagements is likely to require more time to achieve results for those customers than a CSM who is spread between less customers and less complex engagements.

The customer maturity level is yet another way of thinking about the likely amount of time and resources required for each customer engagement. This time it's not about the importance of the engagement or the complexity of the engagement, instead it's about how much help the particular customer is likely to need, based upon their current level of knowledge and experience in onboarding, adopting and generating measurable value from the types of products and services that they have purchased.

Some customers can be rated as having a high maturity level. These customers are the type who have made multiple similar purchases before and who have internal staff with the expertise and resources needed to be able to deal with the engagement successfully with only minimal help and assistance from the CSM.

Other customers might be rated with a low maturity level. These customers might perhaps have limited or even no experience of adopting and using these types of products and services and may not have the internal expertise and resources needed to make a success of the engagement on their own. This type of customer may require a lot more help and assistance than the first category.

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Creating an Engagement Strategy: Engagement Effort Score

	Engagement A	Engagement B	Engagement C	Engagement D	Engagement E
Priority	2	3	1	5	2
Complexity	3	3	2	3	2
Maturity	-3	-1	-1	-4	-5
	2	5	2	3	-1

Whatever the circumstances, the CSM needs to be aware of them and needs to rate the engagement accordingly in terms of all three aspects – priority, maturity and complexity.

They can then at any time review all of the levels of all current engagements to decide how to divide their time and resources between all of these current engagements in order to make best use of them.

In the example shown here, the CSM has rated five customer engagements according to their levels of priority, complexity and customer maturity. By using inverse numbers for maturity level (for example using -5 instead of +5 for a high maturity level and -1 instead of +1 for a low maturity level), the CSM is able to combine the three scores and get a very simple, visual picture of which engagements they might need to spend more time and resources on and which they might need to spend less time and resources on. This might be thought of as an “engagement effort score” as it corresponds to the likely overall amount of effort that each customer engagement will need from the CSM in order to ensure each engagement’s success.

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Creating an Engagement Strategy: Outcomes, Milestones & Measurements

- The engagement strategy should include both the customer's and the supplier's outcome requirements
- Understanding the CSM's company's outcome requirements and priorities enables the CSM to prioritize their time and resources to best help attain them
- Milestones to attain along the way should be recorded alongside final outcomes

Whatever anyone might tell you, it's results that count. Unless you are 100% clear as to what results are *required* it is very difficult to attain those results. Therefore the second part of the Customer Engagement Strategy focuses on *outcomes*.

When we think about outcomes we generally think about the customer's outcomes, which is absolutely fine and makes total sense, since the job of the customer success manager is to make customers successful. However if you recall all the way back to Chapter One of the book and Module One of this training course, we also stated that although making customers successful is *what* customer success managers do, we also stated that the reason *why* they do it is to generate value for their *own* company. Both the customer's outcome requirements *and* the CSM's company's outcome requirements from the engagement should therefore be documented within the Engagement Strategy.

The customer's outcomes are documented in the Customer Research Checklist along with a whole bunch of other information about the customer and the engagement, however they can easily get lost in the noise of all that other data, which is why I recommend you pull them out and record them here within the Engagement Strategy as well.

In terms of the CSM's company's outcome requirements, these are not documented already elsewhere and so it is worth our while to discuss them here in more detail.

What do I mean by the CSM's company's outcome requirements? Different companies will have different outcome requirements which they want to see as a return from their investment in their customer success managers' efforts. Companies which sell services contracts are very likely to place

increased contract renewal rates and revenue levels very high up the list of desired outcomes from the time spent by their CSMs in helping customers. Other outcomes that the company may be looking for from customer success engagements might include increased understanding of customers' needs, increased customer lifespans, increased levels of advocacy, and increased expand sales opportunities.

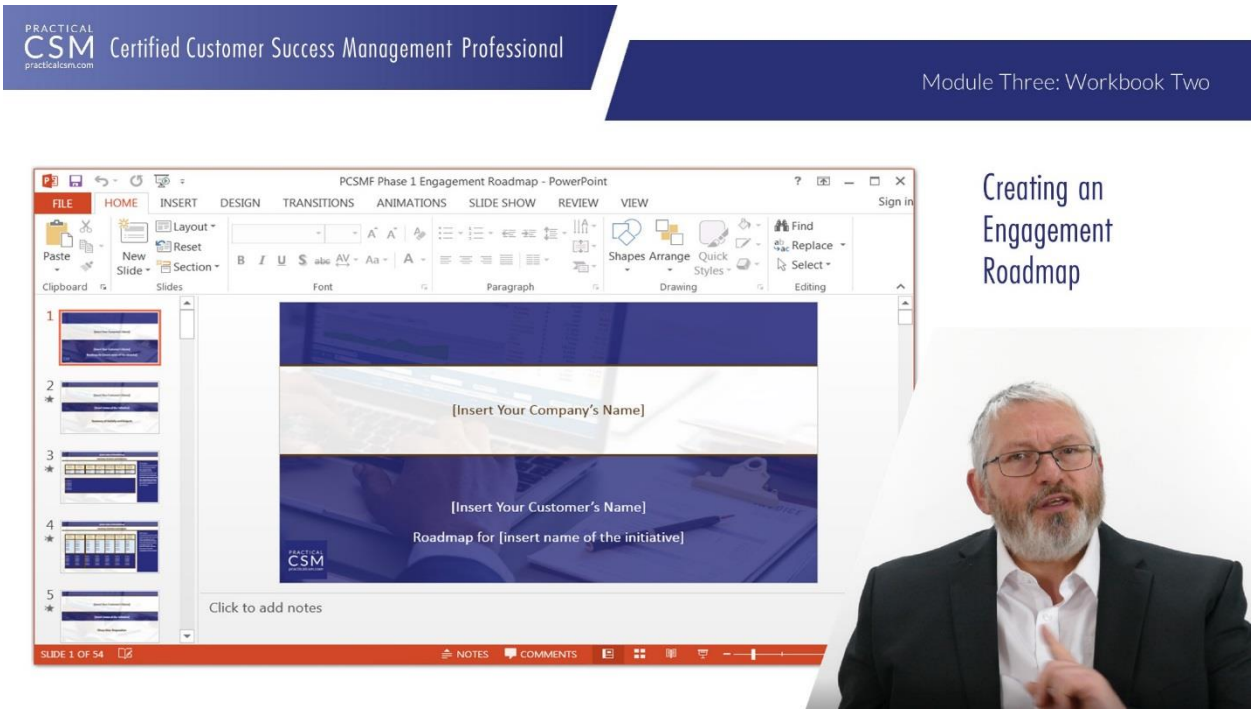
If the CSM has an understanding not just of what their company's outcome requirements are but also how important they are proportionally, then this will help the CSM to make good time management decisions. For example, perhaps Company A sells Service A and Company B sells Service B, and both companies have a customer success management team. For Company A it's all about cash flow. What's essential to this company right now is to maximize the amount of revenues coming in to the business. With this in mind they focus their CSMs on maximizing retention rates and renewal levels and spotting expand opportunities. Company B on the other hand has a major strategic campaign to gain additional market share. Renewals are of course important, but equally important for Company B is advocacy, since this provides powerful support for winning the new customers that are needed to enable this company's market share growth strategy to succeed.

For the customer success managers in each company it is essential that they understand their own company's outcome requirements in order to prioritize their time and efforts to support those outcome requirements.

Alongside ultimate outcomes, there may also be targets for attainment along the way, which might be referred to as milestones. So for example the customer's ultimate outcome requirement might be a 20% increase in average customer satisfaction ratings, which they wish to see achieved within two years. Perhaps that customer might also state that they want to see a 10% increase in average customer satisfaction ratings within twelve months, which will act as a milestone en route to attaining the full 20% in another year's time.

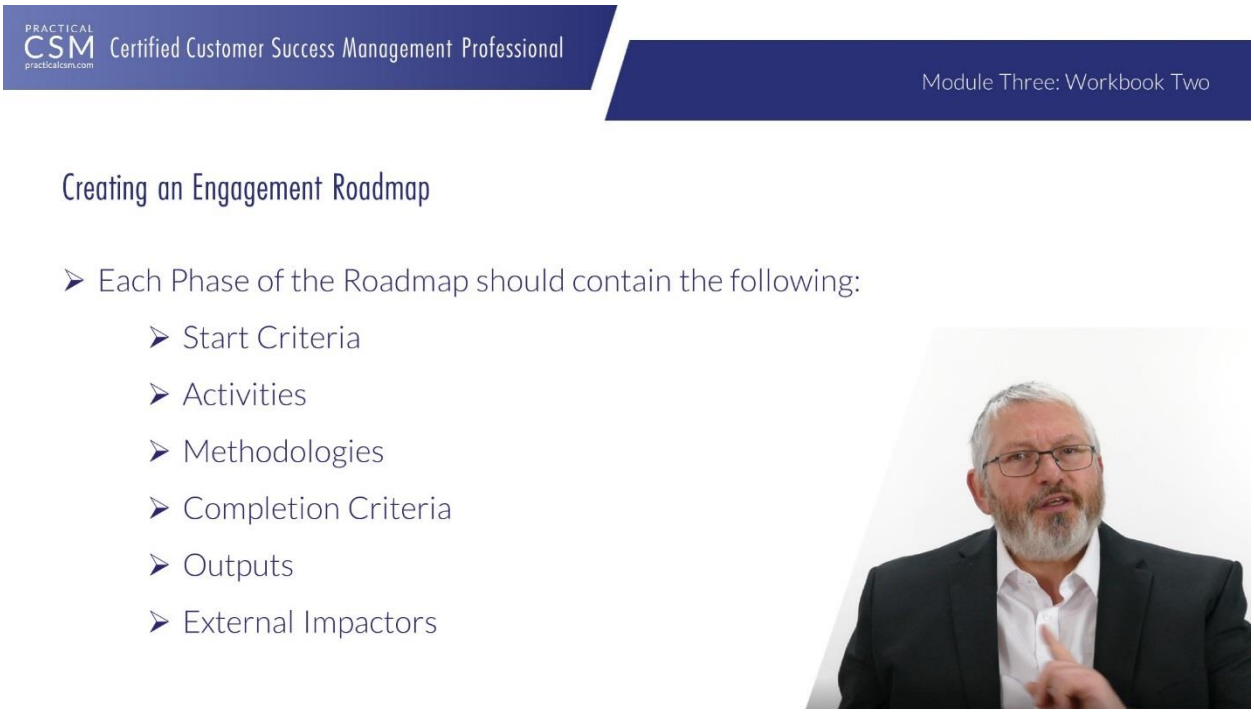
By this stage the CSM has defined everything relating to goals and objectives and should have a clear idea as to what it is that needs to be achieved both from the customer's and their own company's perspectives. The other things to document are the strategies and tactics to achieve those goals and objectives. These should include a high level (only) description of the major activities for each phase of the Practical CSM framework that the CSM plans to perform, which should include a brief description of each activity together with its purpose, who will be responsible for completing it and its time and resource requirements.

- Preparation
- Commitment
- Onboarding
- Adoption Planning
- Adoption Implementation
- Value Creation Activities
- Engagement Evaluation



As you may recall from Chapter 4 of the book, a roadmap is simply a high level timeline that makes it easy for you to track engagement progress and the completion of key milestones over time and to share with other stakeholders who are interested in understanding the bigger picture but who may not be interested in or need to know about the details.

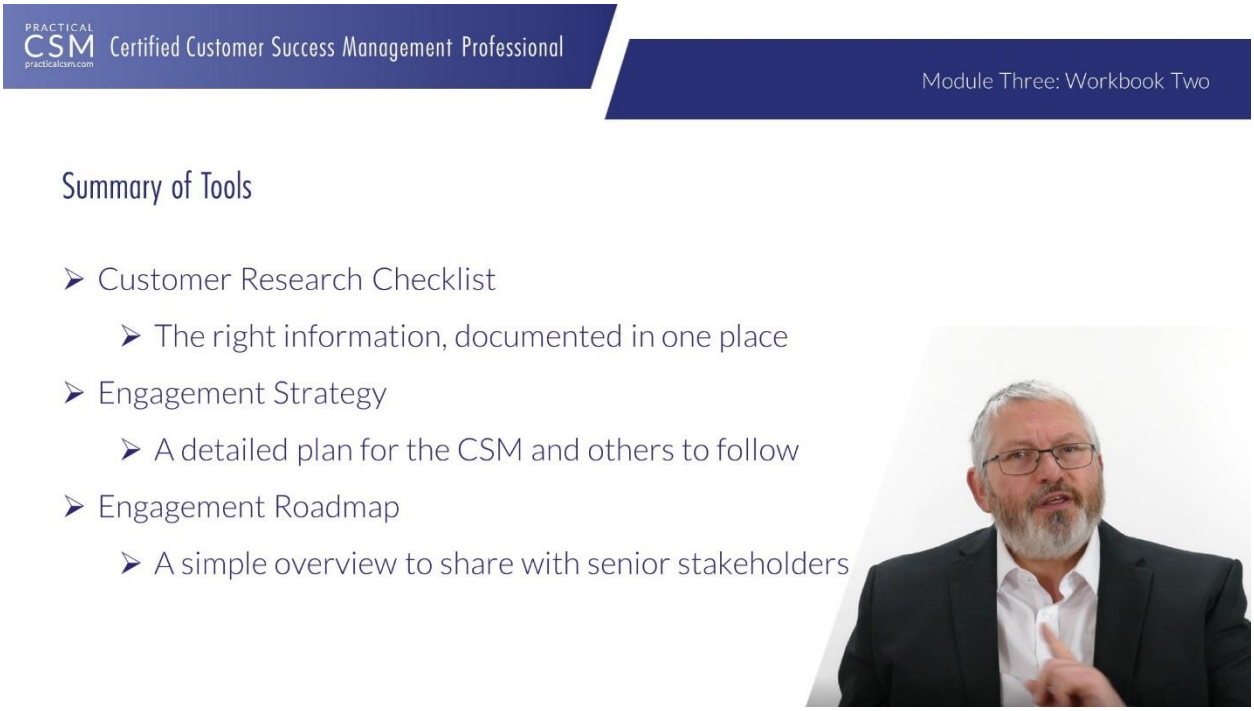
As with the Customer Research Checklist and Engagement Strategy tools, students might wish to pause the video to open the Engagement Roadmap tool to review it.



The roadmap enables you to break the journey into a series of shorter and more manageable segments or phases, so that at any one time you need only worry about carrying out the activities of the current phase and preparing for the activities in the upcoming phase.

Each phase should have the following:

- Start Criteria (for example the completion of the previous phase, or a signature or other approval from a key stakeholder)
- Activities (ie the tasks which must be done in order to be able to state that the phase has been completed to a satisfactory standard)
- Methodologies (ie how each activity will be completed)
- Completion Criteria (ie the criteria for phase completion, such as successful completion of all tasks)
- Outputs (ie any specific outputs that can be used to measure the phase's success)
- External Impactors (ie anything that may have an impact on the smooth running of that initiative and therefore needs to be managed)



In summary, the Customer Research Checklist provides a way to make sure you research the *right* information and that you have it documented in one place for simple and ongoing reference. The Engagement Strategy combined with the Practical CSM framework itself provides a detailed plan for the CSM and others to follow in order to attain the desired outcomes for both the customer *and* the CSM's own company. Finally, the Engagement Roadmap provides a simple overview of this plan which the CSM can share with senior stakeholders, who can use it to approve the plan and also as a way of tracking progress throughout the entire engagement.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