



**TOP
7**

**CUSTOMER
SUCCESS
GOALS**



Successful Customer Onboarding

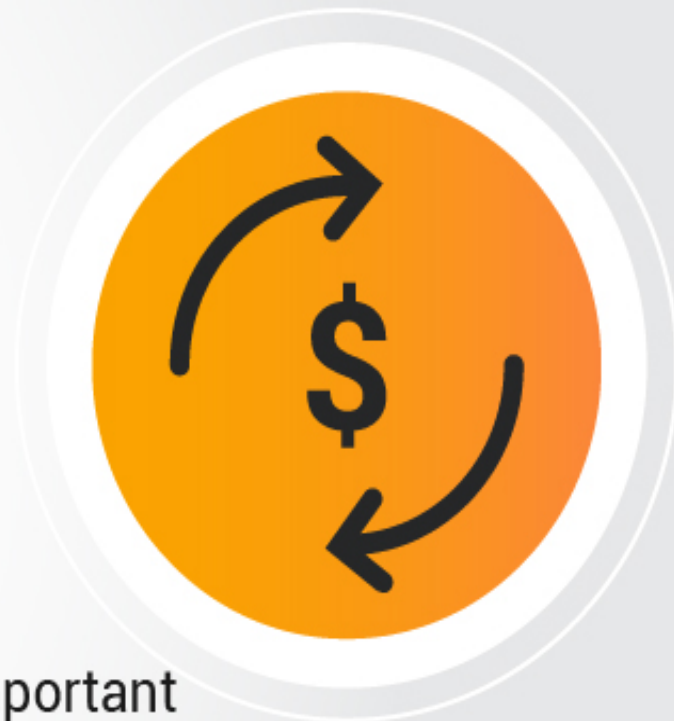
Getting off to a strong start greatly enhances the chances of achieving success, and a long term satisfied client. During the onboarding period the Customer Success Managers must help customers start from a position of confidence about using your company's product, and this phase should definitely include demonstration of "First Time Value" to the customer.





Converting accounts from 'Trial' to 'Paid'

Though not relevant for all businesses, this happens to be the second important goal for many Customer Success teams. Enhance your understanding of the trial users and be better equipped to identify which product characteristics will resonate with which persona/role. Insights into usage data can even help you determine the best moment to convert a trial user.





Achieving Customer Confidence

To set customers up for success, make Customer Education ongoing. Conference calls could be scheduled for customised training on how to use the product. Mails with small but important pieces of insights (at the appropriate frequency) could be shared to get them interested to log back in. Hotspots, overlays & videos placed within the product should make it easy for users to figure out how to derive value.





Becoming 'Voice of Customer'

It is the responsibility of the Customer Success Manager to ensure that customer feedback is heard and appropriately handled, and requests for changes / custom development are appropriately managed, with clear communication. A Customer Success Manager has to become the accepted Voice of the Customer within your organization, to slowly achieve the status of "trusted advisor" to the customer.





Monitoring Pulse of the Customer

Promoting customer success isn't always about showing customers how to be successful, sometimes it is about engaging them in a dialogue. Regular checks from the customer success manager about how your company's product is meeting customers' needs always help, and the areas of possible improvement should be acted and communicated upon, as appropriate.





Outcome based Upsell

Identifying opportunities for your company to offer additional services to customers starts with understanding those needs. Customer Success Managers are in an ideal position to bring these opportunities to the customer's attention once they are aware of how plans with your roadmap on additional features (or additional products) can help customers achieve their desired outcomes.





Ensuring Renewal



The worst thing you can do is call a customer and surprise them with the news that the renewal is up for next week. Good Customer Success Managers set a goal to create and execute a 60-90 day plan for renewal of each account, which could include taking a pulse, showcasing value, having some discussion about upcoming features and roadmap, and then closing out on the renewal.