Welcome to Scaled Customer Success

In this playbook you will find everything from the **larger mission and vision** of our organization to the **nuts and bolts of your day to day** as a Scaled CSM. New and current CSMs use this playbook as a tool to keep coming back to, a reference point for how to do your job well and where to go when you need help and more information.

We are SO happy to have you on this team. Let the adventure begin!

What good stuff is inside!?

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Guiding Principles

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Mission

Our goal is to ensure that customers are **realizing the value of their Zendesk investment** through adoption, optimization, growth, and improved CX operations. The team achieves these customer successes through a blend of targeted, 1:1 engagements and programmatic 1:many events, relies on data, works cross functionally and supports an array of customer segments, regions, type and industries.

Ultimately, efforts compound to
increase customer GRR and customer satisfaction.

ASSESSING PERFORMANCE: *KPIs*

SCALED 2025 KPIS

Drive customer outcomes across BoB

Quality

KPI	Purpose
4.3 Avg CSAT	Ensure quality from the customer perspective
4 Avg Rubric Score	Coach to drive customer outcomes and value across the team

Book Coverage/Volume

KPI	Purpose
30 Unique Success Plans/Qtr	Ensure customers have a roadmap to achieve success
50 Total Meetings/Qtr	Drive two part meetings & check ins/follow ups to success plan meetings
70% Completion of High Risk CTAs *(this will include Adoption CTAs)/Qtr*	Ensure that we meet with the customers that data indicates need our help
80% of BoB touched/year	Drive positive customer outcomes across the bulk of BoB, uncover risk for less responsive customers

Book Coverage/Volume

KPI	Purpose
Support Admin Certification by end of H1 for entire team	Enhance product expertise to enhance our ability to help our customers achieve desired outcomes

ASSESSING PERFORMANCE: *Quality*

Shifting to a KPI model that has less emphasis on unique customer volume and more emphasis on depth of customer engagement necessitates an increased focus on quality. As we review and onboard new quality assistance tools, leaders will be joining and listening to more calls using our quality rubric. This feedback will be made actionable, inform future upskilling, and be reflected in performance overviews. **The target baseline is an average score of 4 out of 5 based on the quality rubric used by your leader.**

How is Quality assessed?

Five key areas are evaluated for quality:

- Introduction
- Discovery
- Value Delivery
- Administrative
- Relationship Building

Within these areas, there are scored sections that result in a total area score. These area scores are averaged for an engagement quality score. All customer engagements will require a CSAT survey which will soon be improved and automated. Cross functional feedback is welcomed and taken into account, as is responsiveness and engagement.

Why?

It's key we maximize every touchpoint with customers. Ensuring the right level of preparation, a positive experience in-line with customer's needs and objectives, professional and impactful delivery, and thorough follow up and recommendation are the critical elements of strong engagements.

Average Engagement Quality	Performance Category	Description
4+	Exceeds Expectations	Averaging a score of over 4 on your quarterly engagements indicates consistent, high quality engagements
4	Meets Expectations	Averaging a score of 4 on your quarterly engagements indicates that you're meeting most parameters while still having room to improve
<4	Misses Expectations	Averaging a score of less than 4 on your quarterly engagements indicates that you are not delivering the necessary quality and must work to improve. This may result in a coaching plan with your manager to course correct.

*Engagements are reviewed and scored by your manager based on this rubric with a minimum of 6 engagements per quarter
*Region, project involvement, and other considerations to be made by Leadership relative to performance application

ASSESSING PERFORMANCE: *Quality*

Your leadership team is committed to participating in and reviewing your engagements this quarter.

The rubric on the right will be used to assess the quality of the meeting, with 1-5 scoring in each subcategory. The total output is average for a meeting engagement score.

All of your engagement scores will be averaged for the quarter to determine the quality KPI.

Zendesk is actively reviewing quality tools (Gong?!?!) and we should expect more automated, at-scale quality solutions to be reintroduced in H2

CSM:	
Customer Name:	
Link to call recording:	
Call Reviewed on:	

Introductions		
Dedicated time for CSM introduction and customer introductions	5	
Understanding roles of each person present at engagement	5	
Clear expectation setting -- what CSM will do, what the engagement will provide, what the customer is looking to receive from engagement	5	
Introductions Avg.		5
Discovery		
Collected comprehensive data about the customer's current situation and environment	4	
Sought to understand the customer's existing workflows, processes and systems	4	
Demonstrated active listening skills to understand customer goals and objectives	5	
Asked probing questions to uncover customer pain points and challenges	4	
Empathized with the customer's perspective and shows genuine interest in their success	3	
Discovery Avg.		4
Value Delivery		
Provided guidance on product utilization and best practices	4	
Identified opportunities for improvement and optimization (could result in upsell)	5	
Clearly communicated the value of product usage and recommendations	4	
Aligned customer goals with the capabilities and features of the product	4	
Demonstrated product knowledge to reinforce themselves as a trusted advisor	4	
Value Delivery Avg.		4
Administrative		
Recorded accurate and detailed notes from customer conversation/meeting	4	
Summarized key findings, insights and action items	5	
Shared relevant customer information with internal stakeholders as needed	3	
Updated internal tools accurately and completely as required	5	
Administrative Avg.		4
Relationship Building		
Engagement provided a meaningful interaction	4	
Demonstrated of clear understanding of customer goals, needs, and challenges	4	
CSM built credibility and work to become a trusted advisor	4	
Relationship Building Avg.		4
Total Engagement Score		**21**

Averages	
Introductions	5
Discovery	4
Value Delivery	4
Administrative	4
Relationship Building	4
ENGAGEMENT SCORE	4

1:1 Engagements

zendesk

Anatomy of an Engagement

Identify customers for engagement

1. Leverage CTAs to identify customers that will benefit from a 1:1 engagement
2. If the customer outreach wasn't automated through Journey Orchestrator, complete outreach steps to invite customers to meet with you

Preparing for engagement

1. Review the CTA for upcoming engagement to determine reason and type of engagement
    a. *Pre-renewal CTA fired = retention engagement type*
    b. *Adoption CTA fired = adoption engagement type*
2. Complete pre-discovery - use tools to research customer, prepare data-driven discovery questions

Discovery

1. Facilitate discovery with the following objectives top of mind: introductions and expectation setting, aligning on goals, and uncovering challenges and opportunities
2. Use the information uncovered in discovery to solution and build a success plan

Success Plan Delivery

1. Clearly communicate how your recommendations and proposed solutions align with their short term and long term business goals
2. Provide a clear and agreed upon success plan – highlight roles and responsibilities and timeline, the importance their commitment and partnership is to the ROI

Follow Up + Gainsight Admin

1. Follow up with customer via email – include recap of success plan, relevant resources, info to unanswered questions, and next call invite, if applicable
2. Complete Gainsight tasks

When things don't go as planned

1. Unresponsive customers – unghosting them through outreach
2. Escalations

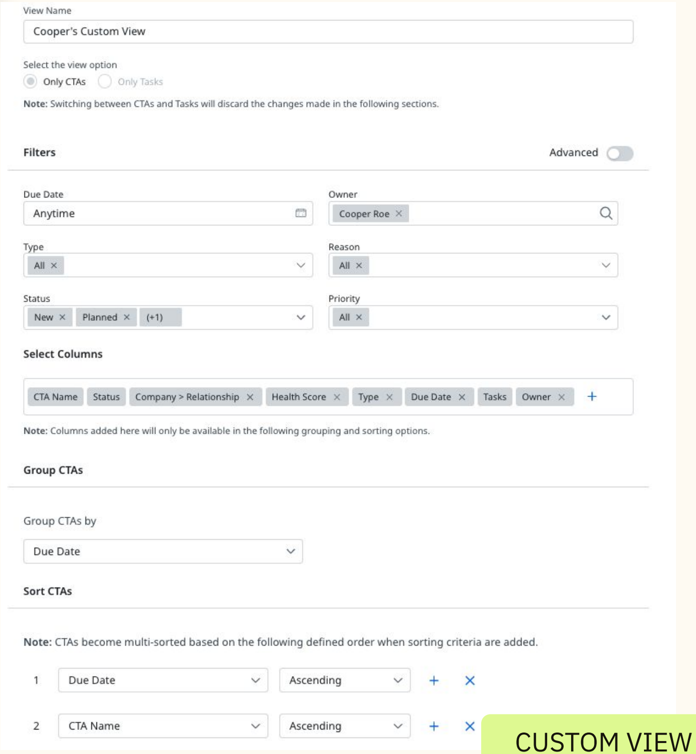
CUSTOMER OUTREACH

GAINSIGHT

Go to your Cockpit

1. Navigate to Gainsight and click the Cockpit icon.
2. Either use the populated View or create your own.
3. Click on the CTA and review the Details and Timeline tabs.
    a. Timeline will show prior communication and meeting information.
4. Click the hyperlink under Company to go to the Gainsight page for that account.

Normally, CTA's are ordered by Due Date. Create a Custom View for further customization.



CUSTOM VIEW

CALL TO ACTION (CTA)

A CTA is a starting point for your engagements

In Gainsight, a CTA (Call to Action) is a feature that helps CSM's **manage customer interactions and drive specific actions** based on customer health and engagement metrics. CTAs are essentially reminders or tasks that **prompt CSMs to take action** regarding a customer, ensuring proactive engagement and support.

We have (and are planning) CTA's on a variety of customer outcomes:

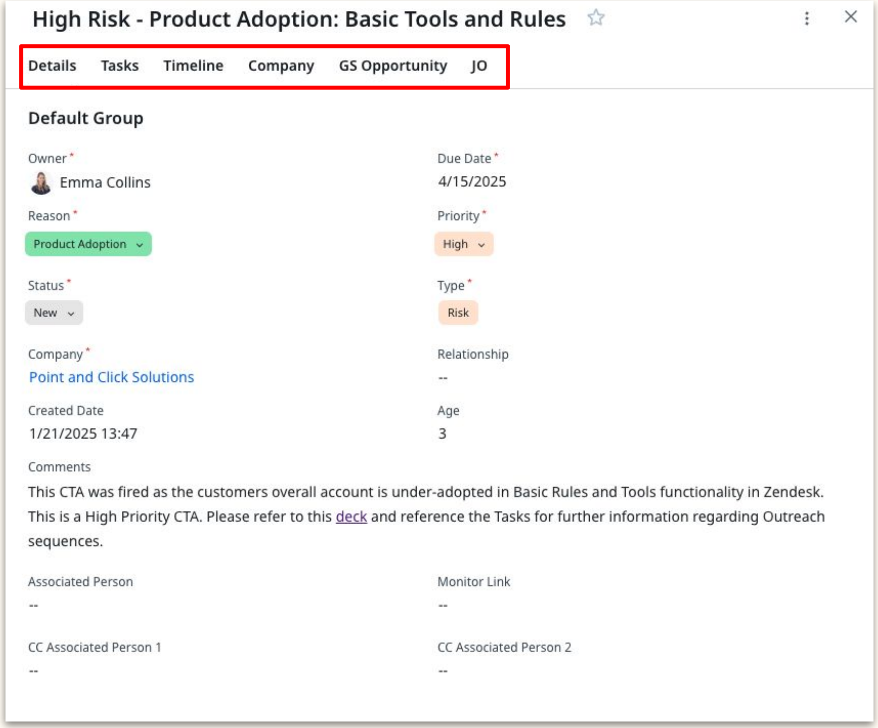
- Proactive renewal conversations
- Insufficient product adoption
- Low engagement
- Cross-functional support
- Onboarding a customer to Scaled Success

CALL TO ACTION (CTA)

Elements of a CTA (Tabs)

Our CTA's have a variety of tabs, but you'll likely only be using a few of them in any interaction

- **Details =** Primary source of information for the CTA
- **Tasks =** Steps that need to be taken to complete the CTA (Playbook)
- **Timeline =** Where you'll log meeting engagements and updates to the Account
- **Company =** Under-utilized, but includes general information about the Account
- **GS Opportunity =** Input a Renewal Forecast (do not use)
- **JO =** (Don't use, will be removed in the near future)

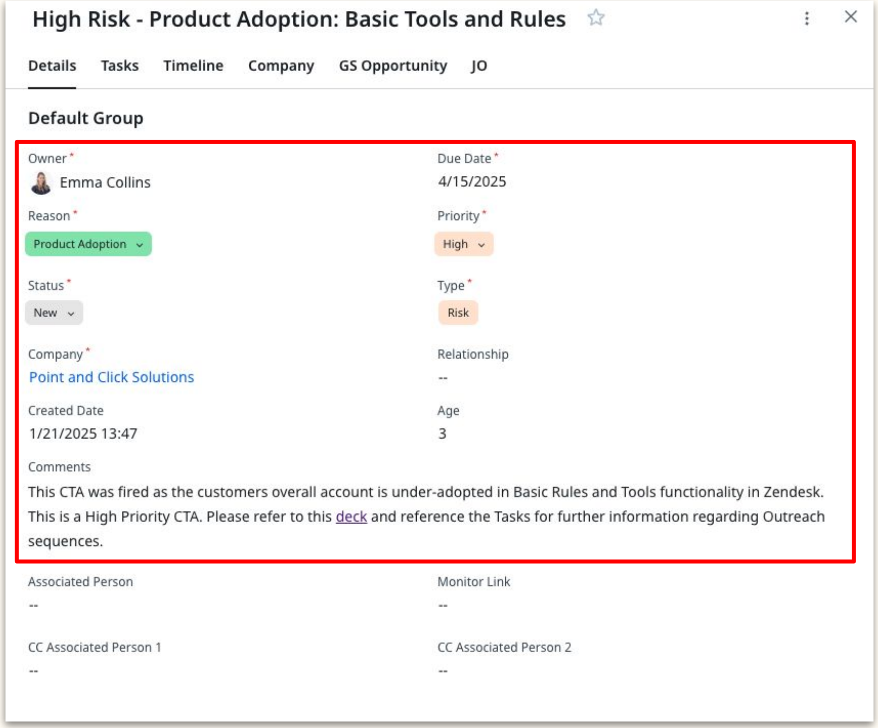


CALL TO ACTION (CTA)

Elements of a CTA (Details Tab)

Many items on the Details tab are intuitive, but we'll break down the key elements when opening a CTA

- **Owner** = Who's responsible for the CTA
- **Due Date** = Goal date to complete the CTA
- **Reason** = Category the CTA is attempting to solve
- **Priority** = Either High/Medium
  - Prioritize High Priority CTA's
- **Status** = Lifecycle of the CTA
- **Type** = Generally either Risk or Engagement
- **Company** = Account the CTA is associated with
- **Comments** = Overall summary of the CTA



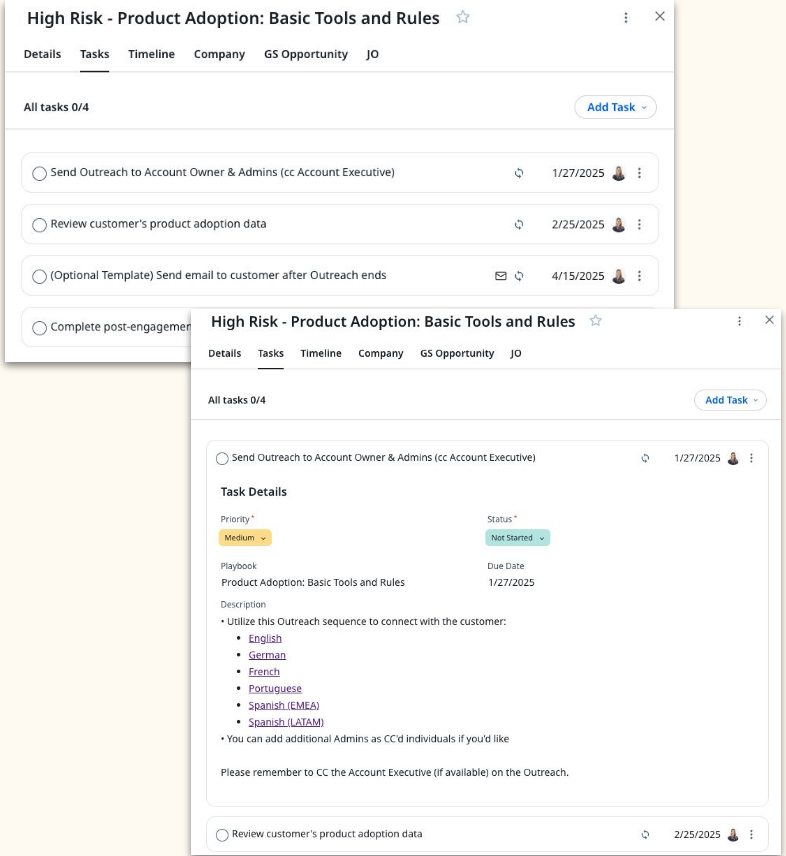
CALL TO ACTION (CTA)

Elements of a CTA (Tasks Tab)

Collection of the Tasks (Playbook) that *generally* need to occur in order to complete the CTA.

Tasks are generally comprised of text denoting the step you need to take, but are occasionally re-purposed as an email template you can send to the customer from Gainsight.

Tasks are not a requirement to completing the CTA, but are a resource of the Playbook the CTA is sourced from.

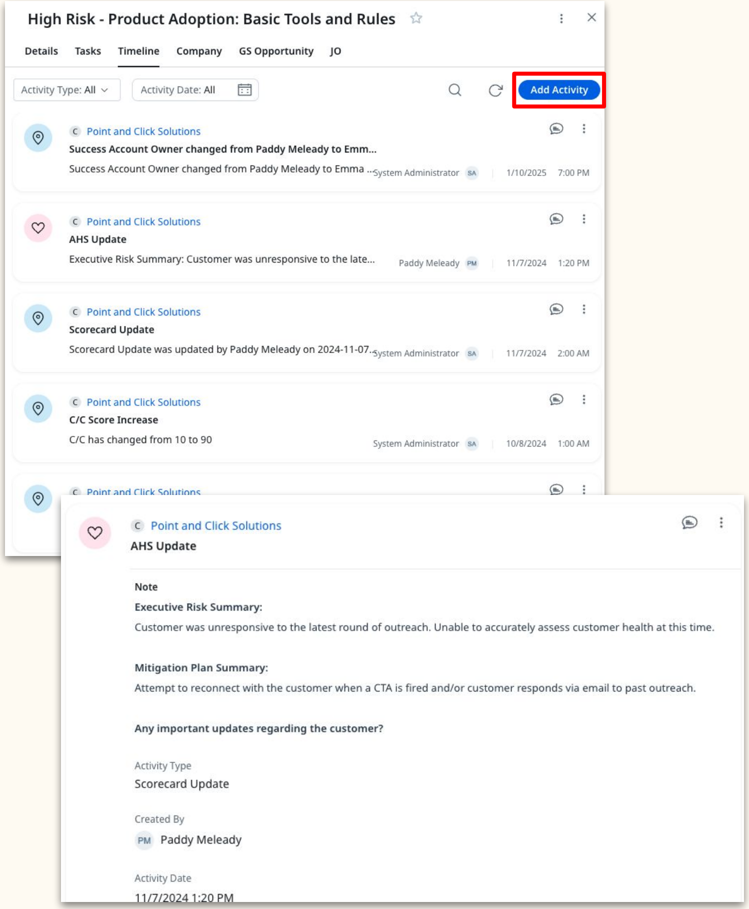


CALL TO ACTION (CTA)

Elements of a CTA (Timeline Tab)

This section is where you will update and review the history of an account that you have a CTA for. You can click "Add Activity" to create a new Timeline Entry.

While you do have the ability to add a Timeline entry from the Account view in Gainsight (more on that later), it is required to update the Timeline from the CTA if you have an engagement with the customer.



Customer Outreach Processes

There are three ways in which we action the customer outreach portion of CTAs

Automated through Journey Orchestrator

- Automation will send sequence through Journey Orchestrator without any CSM action needed
- CTA will populate in CSM's cockpit as "planned"
- When the customer books a meeting, CSM manually should move the status to "in progress"
- Ultimately, the bulk of our outreach will happen this way

Manually through Gainsight Tasks

- CTA will populate on CSM's cockpit as "new"
- CSM will action tasks within the CTA to send an email to the customer through Gainsight
- When an email is sent, CSM will manually update the CTA to "planned"
- This is the current outreach process for any "pooled" CTAs that are not directly aligned to a CSM's Book of Business

Manually through Outreach

- CTA will populate on CSM's cockpit as "new"
- CSM will add contacts to sequences through Outreach
- When an email is sent, CSM will manually update the CTA to "planned"
- This is the current outreach process for any non JO CTAs that are aligned to a CSM's BoB

GAINSIGHT - AUTOMATED OUTREACH

CUSTOMER OUTREACH

Status for JO Automated CTAs

Journey Orchestrator Flow: Video Walkthrough

CSM Steps

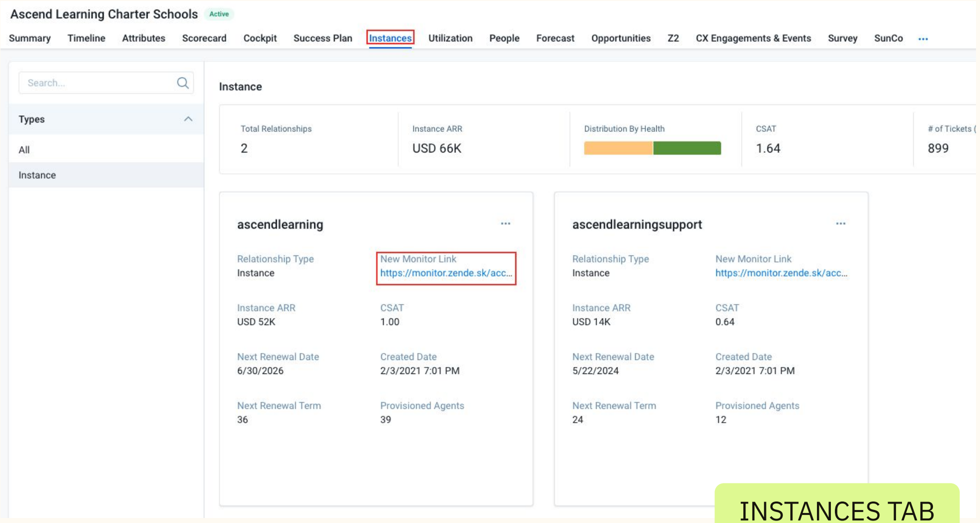
- Check Cockpit for new CTAs
  - **Planned =** Contacts will or have been added to JO Sequence
  - **New =** No Admins/Owners identified. CSM work through CTA like usual
- When customer schedules time, they are dropped from campaign (as well as any other contacts from company)
- **In Progress =** meeting scheduled
- **Completed =** meeting held
- **Closed Lost =** unable to schedule meeting or customer not interested at this time

GAINSIGHT

Pro-Tip: Some accounts have instances with different renewal dates and amounts. Choose the instance that's most relevant to your CTA.

Navigate to Monitor

1. From the Account page, click on the Instances tab.
   a. This will show you the associated instances, ARR, renewal date, etc.
2. Click on the Monitor link for the instance you're looking to connect with.



INSTANCES TAB

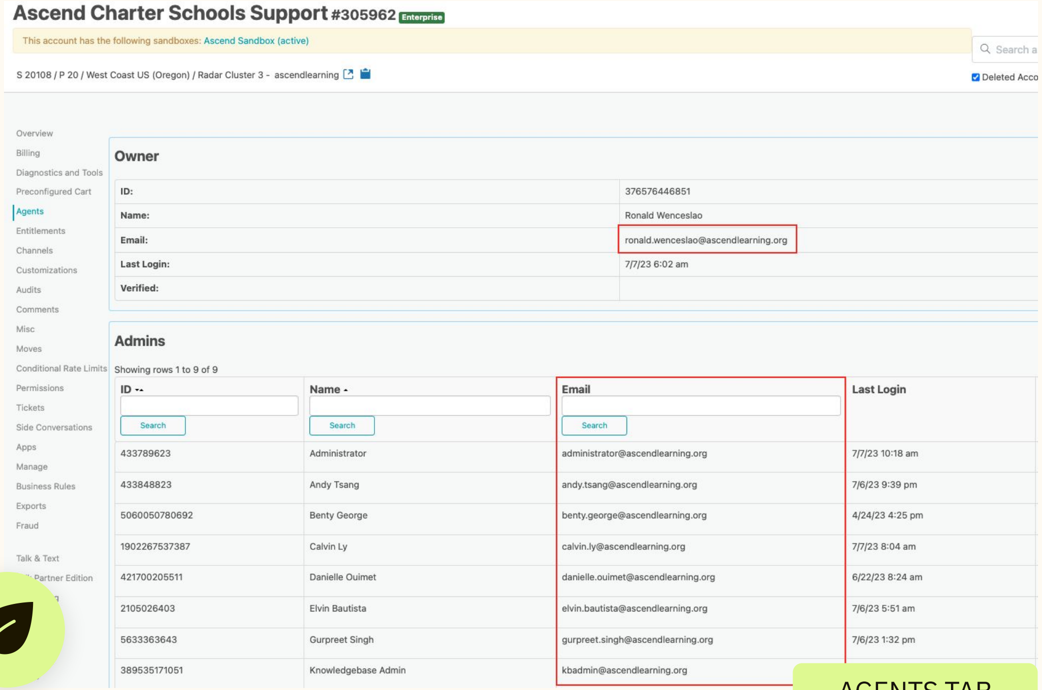
CUSTOMER OUTREACH

MONITOR

Determine Account Owner/Admins

1. In Monitor, click on the Agents tab.
2. When determining who to outreach, consider a few items:
    a. Has the Account Owner logged-in recently?
    b. Which Admins have recently logged-in?
    c. Looking at the Gainsight Timeline, who was the most recent or responsive contact?
3. Keep Monitor open while you navigate to Outreach.

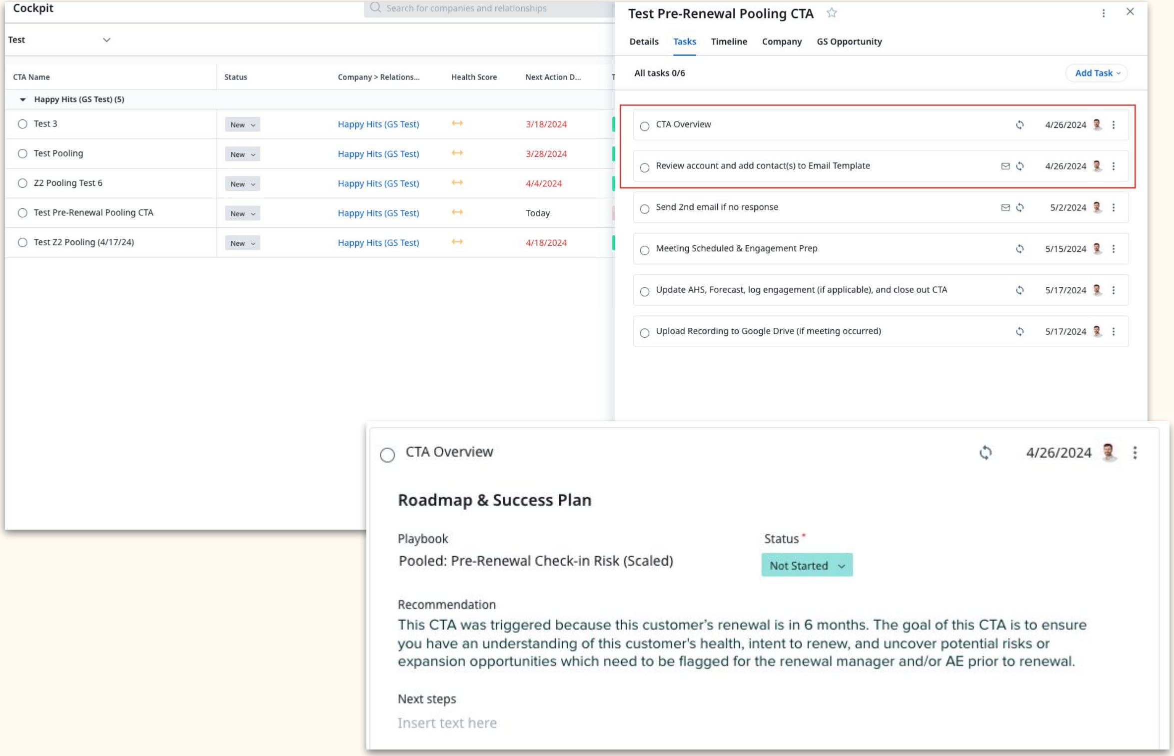
Too many Admins? Check LinkedIn/Sales Navigator to determine the best ones to reach as it relates to the CTA type.



AGENTS TAB

When you receive a CTA, you'll perform a number of actions

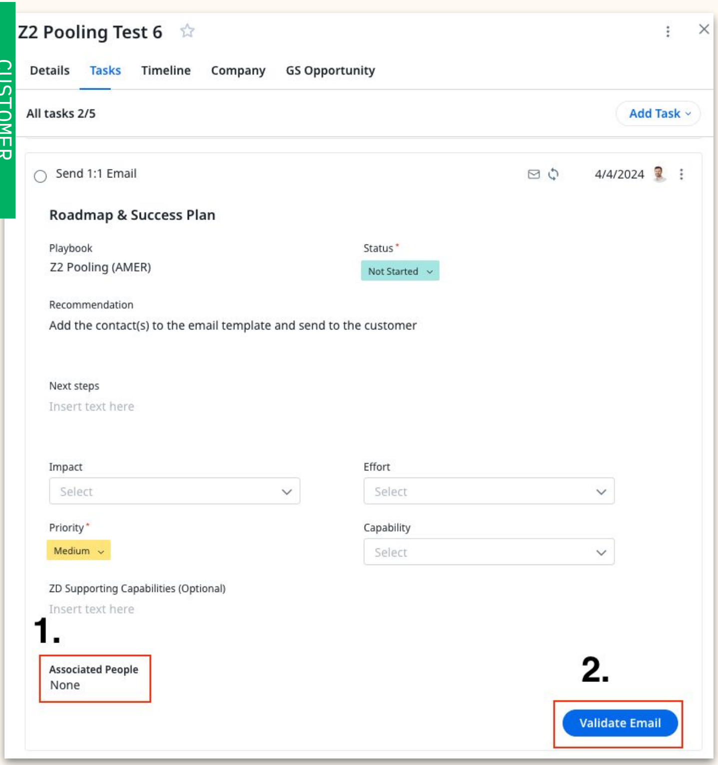
1) Click into the CTA and view the Tasks
2) Review the Task to understand why the CTA was fired and perform the action. These could be:
    a) Overview of the CTA
    b) Sending an email to the customer (Mail icon)
    c) Updating the Timeline
    d) Uploading a recording to the Google Drive
    e) And more!
3) Once you've completed the Task, you can check the box to close it out

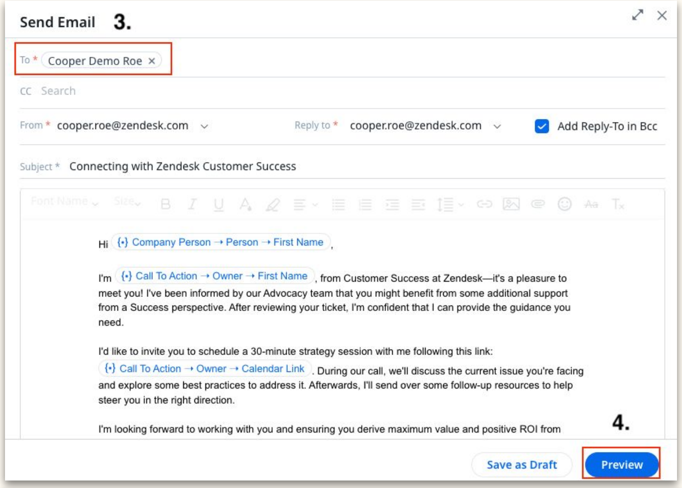


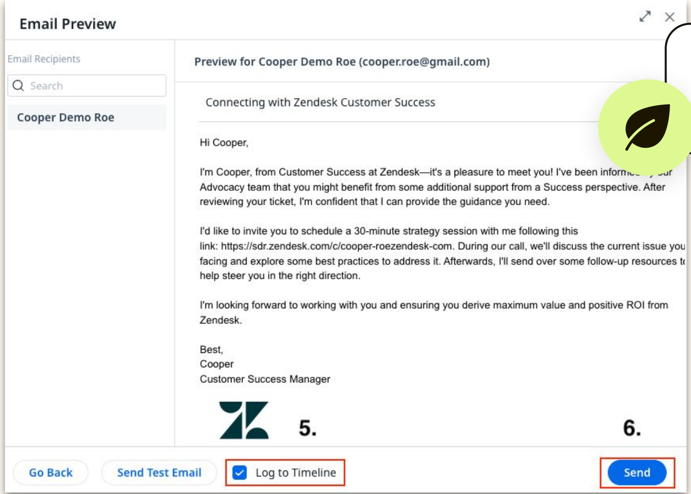
GAINSIGHT -TASK BASED OUTREACH

Email Task Process

CUSTOMER OUTREACH







For finding the right contact, review slides 10-12 on the Scaled Playbook

CUSTOMER OUTREACH

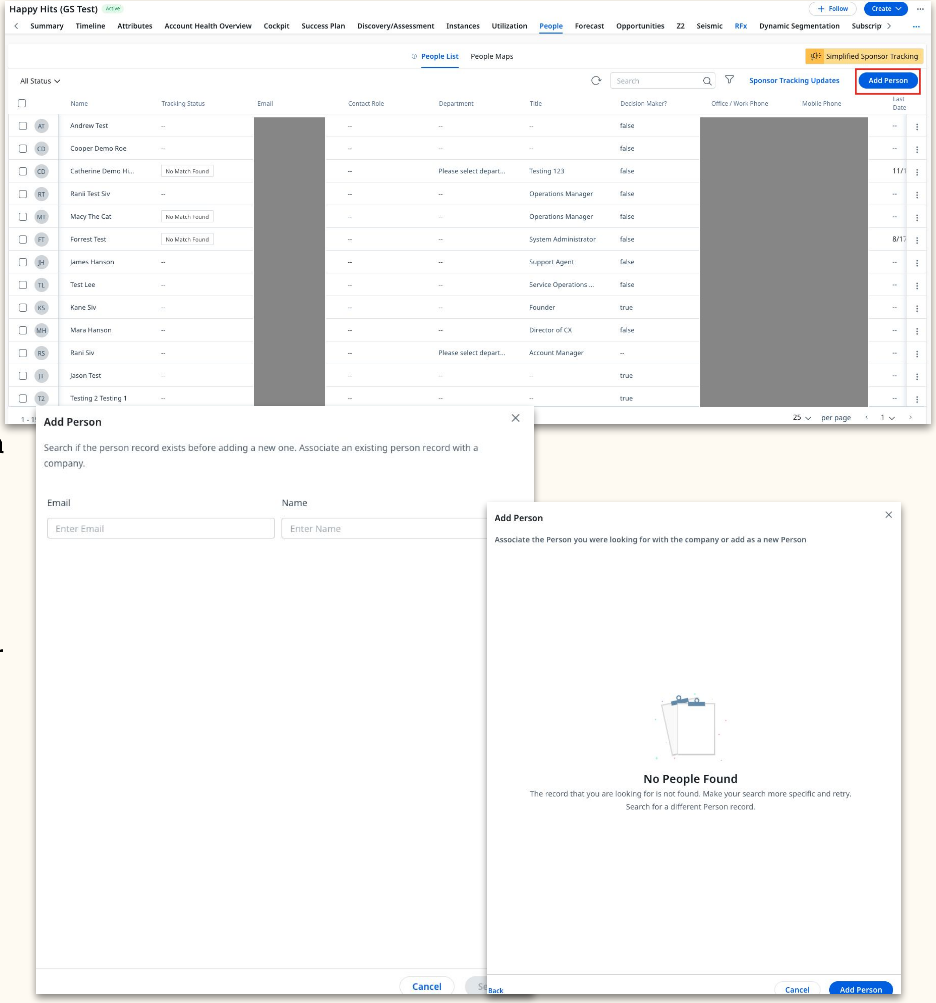
GAINSIGHT -TASK BASED OUTREACH

How to add a Person in Gainsight

If the individual you're trying to send an email to is not populating in Gainsight, that means they need to be added as a Person in the platform.

1) Go to the Account > People
2) Select Add Person
3) Gainsight will try and search for the Person first. Input their email to see if it matches
4) If no match, it will allow you to add them.
5) Inout the First Name, Last Name, and Email

Once this is done, you should be able to add that individual to emails and Timeline Entries



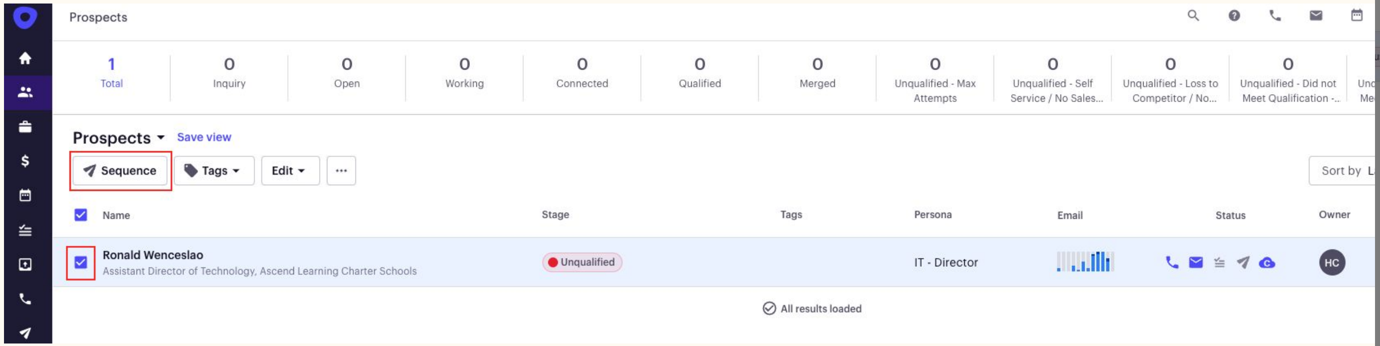
CUSTOMER OUTREACH

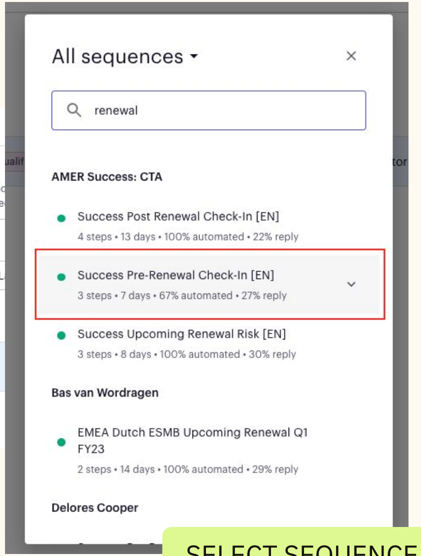
OUTREACH

Outreach your Customer

1. Navigate to Outreach.
2. In the search bar at the top, copy/paste the email address (from Monitor) of who you want the outreach to send to.
3. Click the checkbox, then Sequence. Choose your desired sequence based on the CTA.

If the customer is already in a sequence (paper plane icon under Status) or is Opted Out, you'll want to copy/paste the sequence and send via Gmail





SELECT SEQUENCE

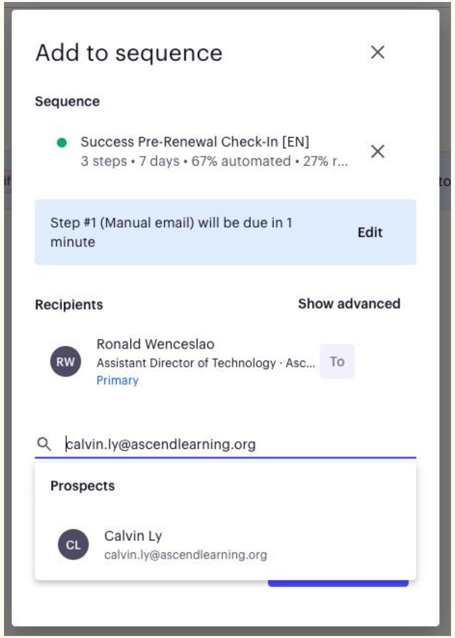
OUTREACH

CUSTOMER OUTREACH

Send the Sequence

1. Once you select your desired sequence, your Prospect will be the To recipient.
2. Add any additional Admins you want to include in the sequence (your CC recipients).
3. Click Add to Sequence when you have your desired recipients.
4. In the following pop-up, if it asks to Start Tasks, select that and make any adjustments to the outreach script.

You can change who you want the To and CC recipients to be by clicking "Make Primary"



Other considerations

Are you already in communication with your customer?

Consider sending an personalized email over Gmail instead! Outreach is a great tool especially for customers who are typically unresponsive or new to your book. For a Renewal CTA, we'd still recommend sending the Pre-Renewal CTA.

Which Admins should you sequence?

Up to you! We'd recommend the Account Owner and 2-3 other Admins who've recently logged in. If there's many Admins who've logged-in recently, consider using LinkedIn/Sales Navigator to determine the best contacts.

Contact not showing up in Outreach?

It's more than likely because they're not a Contact in Salesforce. Go to the Account in Salesforce > Contacts > New. Add-in the contact's First name, last name, and email. This should import to Outreach when the systems sync. You can manually pull it into Outreach if you have the Outreach Everywhere app (open it on the Contact's page in Salesforce). Here's a video walking through this process!

Don't know which instance to choose?

Think about the context of the CTA. Is it a Renewal CTA? Then send it to the renewing instance. Is there one that has significantly high ARR? Opt for that one! Unable to get in contact with an instance, try out the other!

Contact is 'Opted Out'?

You can still connect with them over Gmail. You can search the sequence in Outreach and copy/paste into a Gmail message. It's a bit more work but it'll help you connect with the customer.

Contact in another sequence?

Our GTM teams use Outreach as well! If your contact is in another sequence, view what sequence they're in. If it's recent, don't send a sequence via Outreach and instead copy/paste the sequence text and send via Gmail. If the sequence appears to be old, mark it as Finished. You should then be good to go!

Customer Outreach

Unghosting Customers

Lack of engagement is a negative indicator of account health and can pose a risk of churn/contraction. CSMs must re-engage with unresponsive customers to start to rebuild our relationship with them in hopes of improving the overall account health.

For customers who meet ANY of the “high priority” criteria that have not responded to your initial outreach attempts, implement the Unghost Playbook outlined on the next slide.

⚠️ High Priority Account ⚠️

Your customer meets ANY of the following:

- Adoption CTA
- High Priority CTA
- Red c/c Score

Leverage Tableau and Gainsight to validate the criteria

Unghosting Customers

	Activities
Step 1	Send a follow up email if they don't respond after initial sequence finishes. Add a timeline update in Gainsight to notify your manager and copy your AE + Sales Manager. If any criteria in callout below are met, proceed to next step. If not, update account health to yellow noting lack of engagement.
Step 2	Use Outreach Voice to connect with your customer over the phone and reach out on LinkedIn
Step 3	Ask your manager to reach out if you still have not heard back 3-4 days later. Your manager may mention that resources may be reallocated if there is no engagement. Add a timeline update in Gainsight and copy your AE + Sales Manager.
Step 4	Check the account for signs of risk if the customer hasn't responded 3-4 days later. Update account health to yellow noting lack of engagement and if there are signs of risk, or if they are on a monthly contract.

Ghost accounts should be escalated to manager when:

- **The customer falls under High Priority due to the triggered CTA**

Discovery

DISCOVERY

Pre-Discovery

Use this discovery prep guideline doc

SFDC + Gainsight	Renewal date & conditions Open opportunities Contacts & touchpoints Activities Current products & services	Gainsight
Tableau	Utilization specifics Benchmarks	tableau SOFTWARE
Monitor + Zendesk	Granular utilization specifics Login information Business rules insights Recent tickets with Support	Zendesk
Socials + Internet	Recent news Key POCs and background Industry updates	Google

Importance of discovery

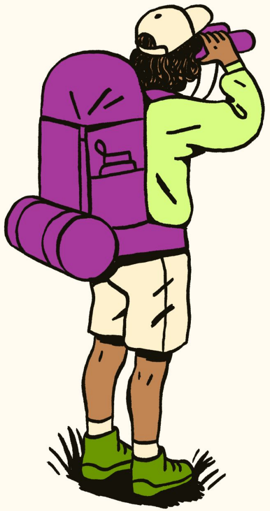
Discovery allows CSMs to gain a deep understanding of the customer's goals, challenges and requirements. It helps identify the customer's desired outcomes and ensures alignment between their objectives and the capabilities of Zendesk.

Other benefits of discovery include:

- enables CSMs to tailor solutions and strategies that address the customer's unique needs
- leads to a higher customer satisfaction, better adoption, and maximizes the value of their investment in Zendesk
- uncovers potential expansion opportunities
- identifies potential risks or issues that might hinder success (i.e. risk mitigation)
- builds strong relationships!

Discovery is a fundamental step in driving customer success and ensuring long-term satisfaction and loyalty (retention).

Note that discovery sessions will be repeated as the customer goals or challenges evolve.



What discovery questions do I ask?

Here are some general categories…

Spend your first 5 minutes here

Spend the bulk of your discovery time here

Get to know them/me

Who is your audience? Are you talking with the day-to-day admin in Zendesk or the CFO who has never logged into their instance? This matters and will determine *how* you deliver your value messaging.

Strategy & Goals

Understand the customer's goals and objectives – at the company and team level. Does their current implementation of Zendesk align with those goals? If not, do they know how they'll work toward them ?

Products & Workflows

It's important to know what products the customer has, but also why. Why do they work the way they do? Are they working efficiently? Do they truly understand their tools and products?

…and you can find a library here!

DISCOVERY PREPARATION

Anticipating your customers' needs via solid research for an efficient discovery

Understanding the customer

- Research your POC and their history with Zendesk
- Research the company and their business goals (ask ChatGPT)
- Research the company's market challenge to understand their priorities as a whole

Understanding the account

- Check their subscription, past history with Zendesk - how is this fitting with what you know about the customer already?
- Check their Tableau data and compare with what you researched

Creating hypothesis

Analyse your finding and come up with one or two hypotheses to test during your call

Watch this Live Training on discovery!

Using Data to inform Discovery

DATA

This isn't a science, but it's close

Data never tells you the full story. Rather, it's a starting point. A foundation that helps you get your head around who the customer is, what their deal is, and perhaps how you can help.

Before every call, I like to check Gainsight, Monitor, and Tableau so that I can go into the call with a general sense of the situation.

But, admittedly, there is A LOT of information contained in these places, so how do you know what to focus on?

What we want

Primarily, as a CSM, we're concerned with:

- Keeping the customer healthy
  - Preventing churn/contraction
- Helping the customer to grow
  - Expanding into additional areas
    - Advanced AI
    - Advanced Data Privacy Protection (ADPP)
    - Premier
    - Assist

What we look for

What data points show us a customer might churn or contract?

What data points show us a customer might be a good fit for growth?

When you're looking at Gainsight, for example, what can you focus on?

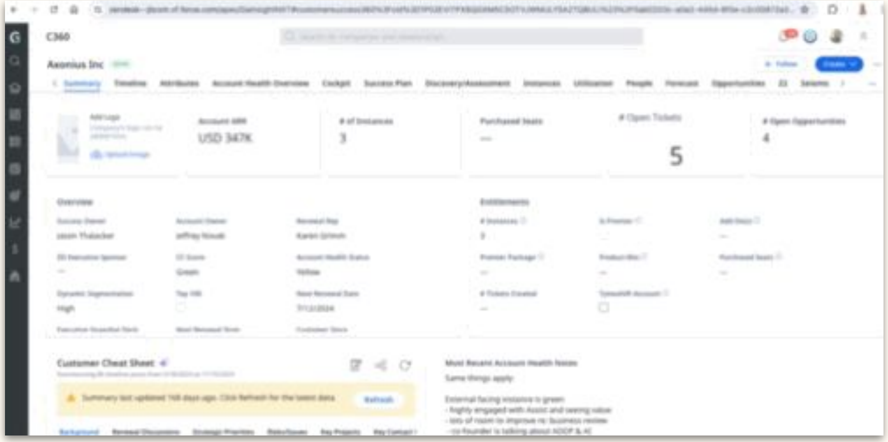
Churn/Contraction

Are they using their seats?

This is step 1. How many seats/licenses are they paying for, and then how many are they actually using?

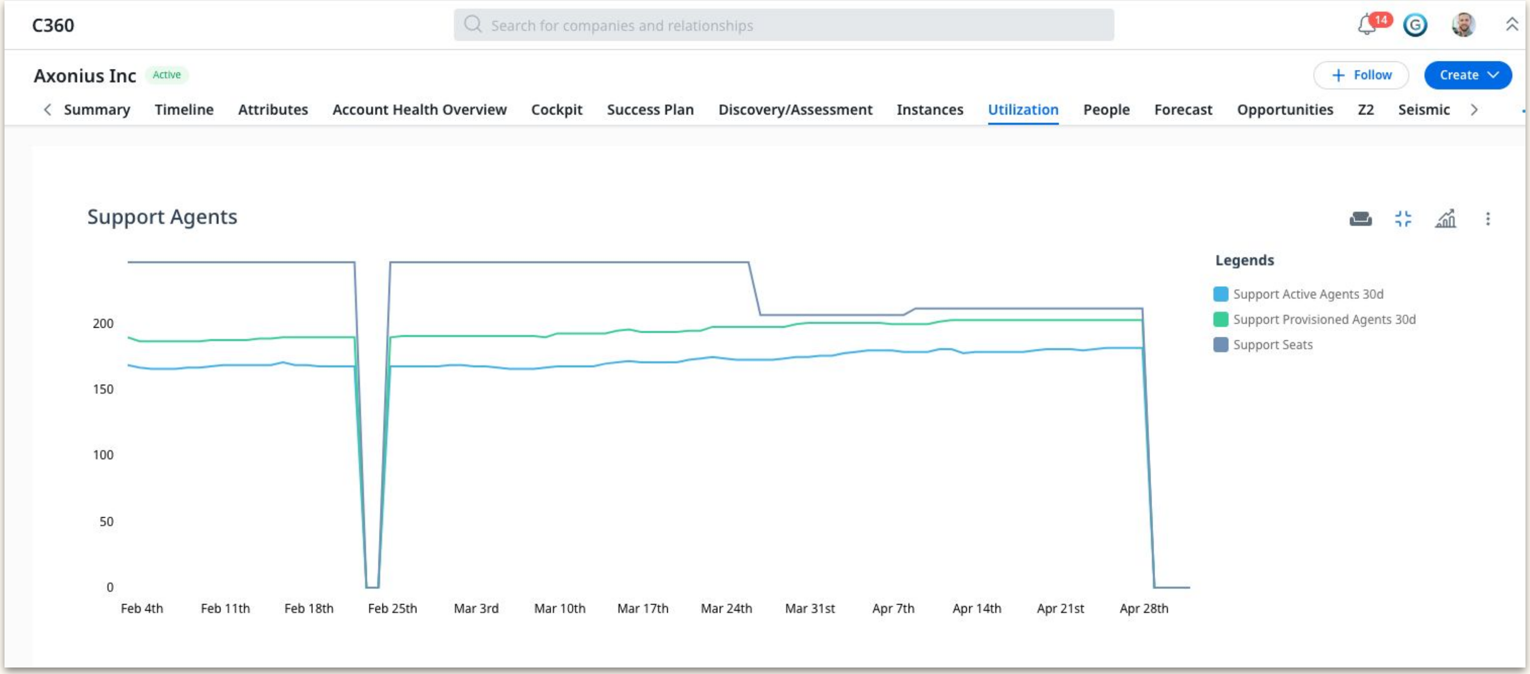
- Support Seats
- Support Provisioned
- Support Active

Head into their Gainsight > Utilization > Support Agents.



DISCOVERY

Churn/Contraction



This customer was paying for way more seats than they were using. Then they contracted.

DISCOVERY

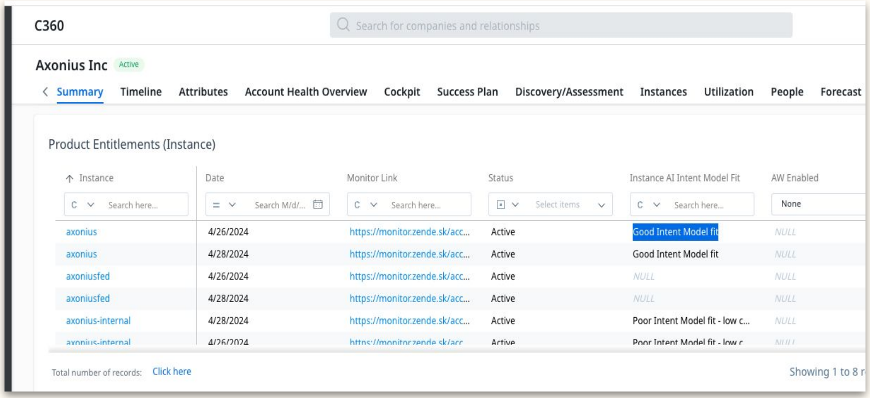
Expansion

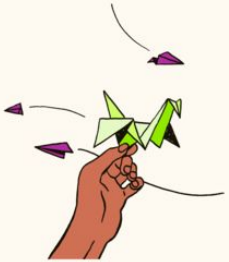
What makes a customer a good fit for Advanced AI?

Again, this isn't a science. There is no single thing that tells us that a customer should buy something. But there are clues…

- Good intent model fit?
- Poor intent model fit?

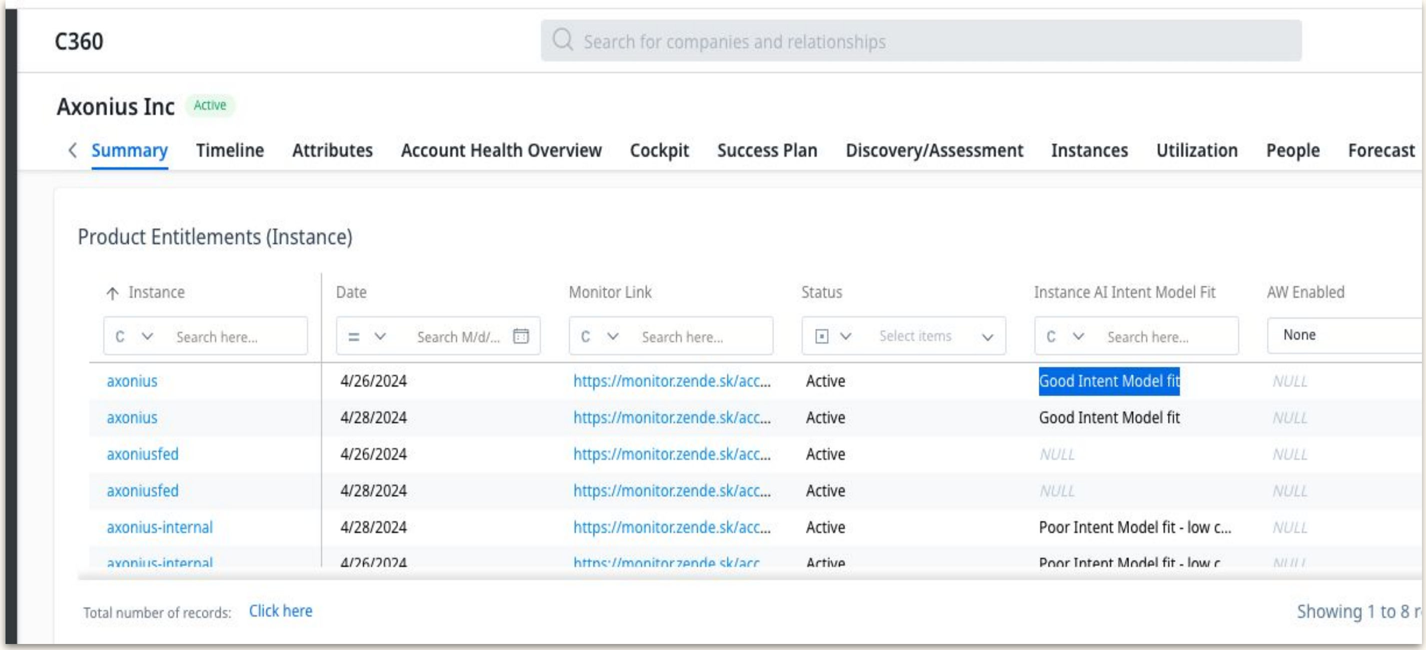
Head into Gainsight > Summary >Product Entitlements (instance)





Expansion

DISCOVERY



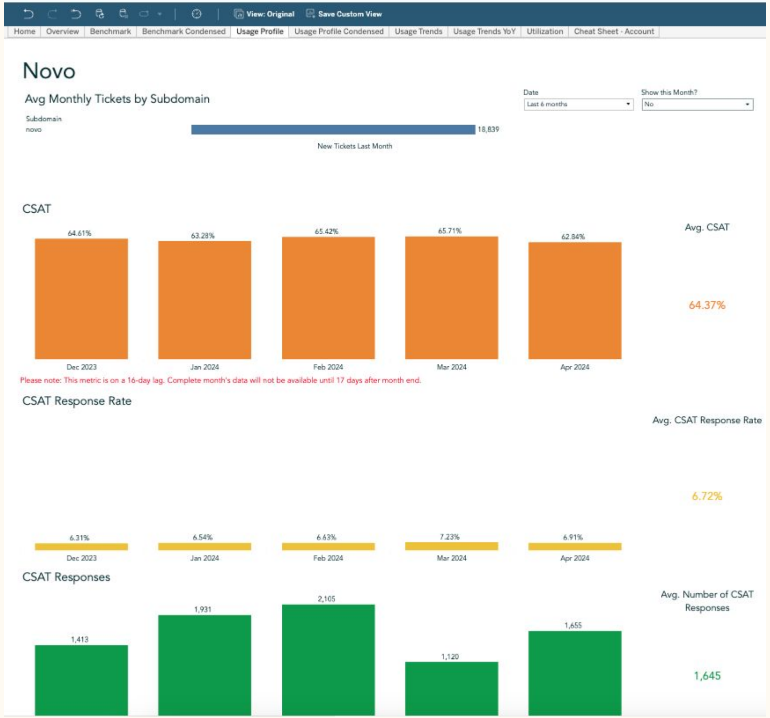
This customer has three Zendesk Instances. One is a Good Fit, another is a Poor Fit.

Expansion

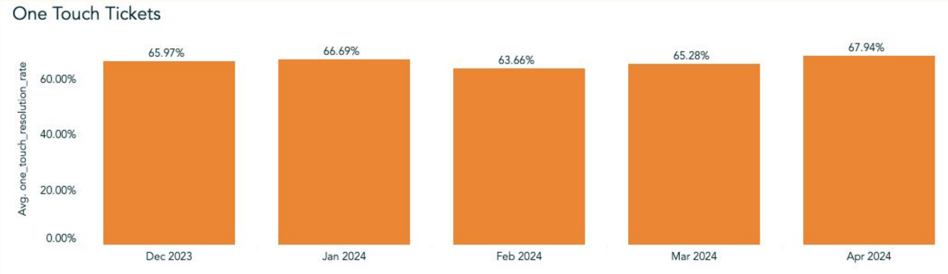
What makes a customer a good fit for Advanced AI?

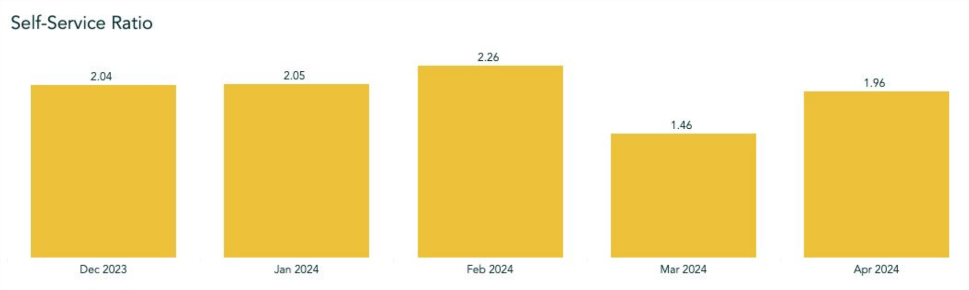
- 1,500+ New Tickets in the last 6 months
- <2 Self Service Ratio
- 40%+ One-touch Ticket Percentage

Head into Tableau > Usage Profile:



Expansion





This customer has a relatively high ticket volume, one touch ticket percentage, and self-service ratio.

DISCOVERY

DISCOVERY

“We’re focused on scaling.

We struggle with triage.

We need to automate more.

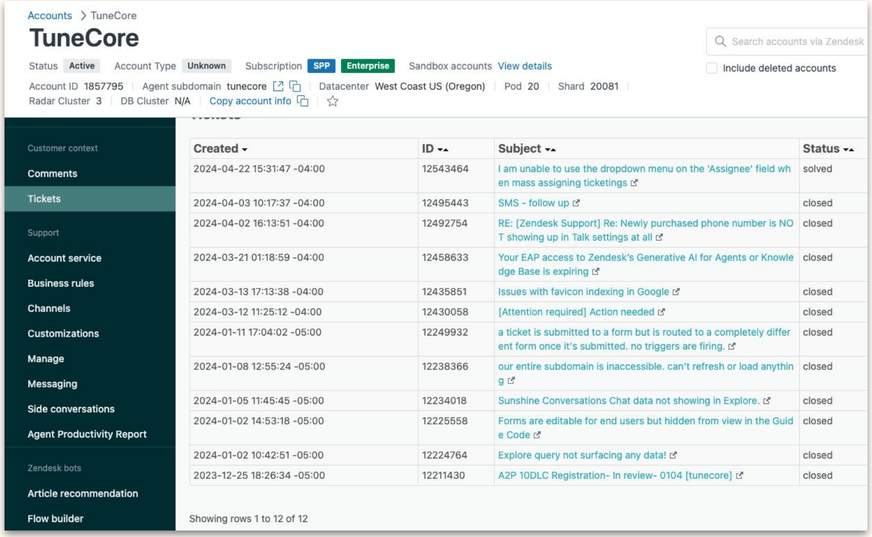
DISCOVERY

Expansion

What makes a customer a good fit for Premier?

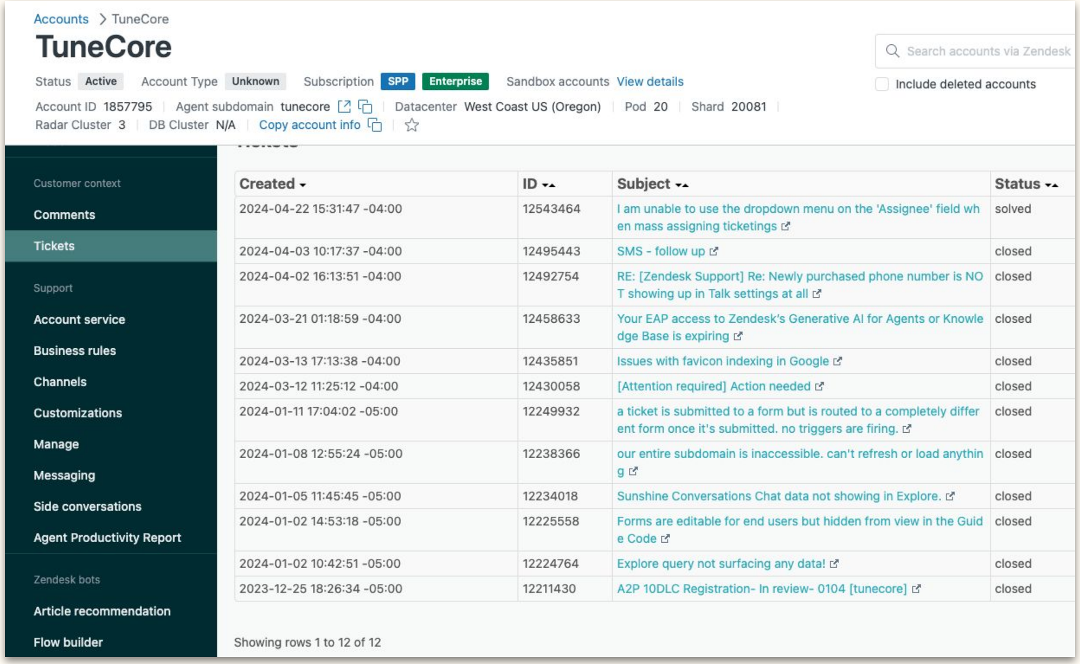
- 10+ tickets with Advocacy in the last year

Head into Monitor > Customer Context > Tickets:



Expansion

DISCOVERY


Accounts > TuneCore

TuneCore

Status Active | Account Type Unknown | Subscription SPP Enterprise | Sandbox accounts View details

Account ID 1857795 | Agent subdomain tunecore | Datacenter West Coast US (Oregon) | Pod 20 | Shard 20081

Radar Cluster 3 | DB Cluster N/A | Copy account info

Search accounts via Zendesk

Include deleted accounts

Customer context
- Comments
- Tickets

Support
- Account service
- Business rules
- Channels
- Customizations
- Manage
- Messaging
- Side conversations
- Agent Productivity Report

Zendesk bots
- Article recommendation
- Flow builder

Created	ID	Subject	Status
2024-04-22 15:31:47 -04:00	12543464	I am unable to use the dropdown menu on the 'Assignee' field when mass assigning ticketings	solved
2024-04-03 10:17:37 -04:00	12495443	SMS - follow up	closed
2024-04-02 16:13:51 -04:00	12492754	RE: [Zendesk Support] Re: Newly purchased phone number is NOT showing up in Talk settings at all	closed
2024-03-21 01:18:59 -04:00	12458633	Your EAP access to Zendesk's Generative AI for Agents or Knowledge Base is expiring	closed
2024-03-13 17:13:38 -04:00	12435851	Issues with favicon indexing in Google	closed
2024-03-12 11:25:12 -04:00	12430058	[Attention required] Action needed	closed
2024-01-11 17:04:02 -05:00	12249932	a ticket is submitted to a form but is routed to a completely different form once it's submitted. no triggers are firing.	closed
2024-01-08 12:55:24 -05:00	12238366	our entire subdomain is inaccessible. can't refresh or load anything	closed
2024-01-05 11:45:45 -05:00	12234018	Sunshine Conversations Chat data not showing in Explore.	closed
2024-01-02 14:53:18 -05:00	12225558	Forms are editable for end users but hidden from view in the Guide Code	closed
2024-01-02 10:42:51 -05:00	12224764	Explore query not surfacing any data!	closed
2023-12-25 18:26:34 -05:00	12211430	A2P 10DLC Registration- In review- 0104 [tunecore]	closed

Showing rows 1 to 12 of 12

This customer has already submitted over 10 support tickets to us so far this year.

DISCOVERY

“Zendesk is slow to respond.

We need more help.

Can you escalate my ticket?

Expansion

What makes a customer a good fit for Assist?

Head into Monitor > Overview > Stats:

- Large number of Macros
- Larger number of Triggers/Automations
- Large number of Views

> We need a tune-up.
> We don't have time.
> We need help.

Stats

1	Brands (Active: 1)
1,554,982	Users
22	Organizations
142	Agents
7	Light Agents
11	Admins
14	Groups
295,977	Tickets
3,517,631	Archived Tickets
13,350	Suspended Tickets
52	Ticket Forms
78	Ticket Fields
0	Ticket Field Conditions
802	Custom Field Options
395	Views (675 total)
1,451	Macros (1,916 total)
7	Automations (10 total)
147	Triggers (185 total)

Art vs. a Science

Remember, these aren't hard and fast rules. They're just good clues, good data points to have in your pocket as you're doing discovery with the customer. They give you helpful material for discussion.

Limiting Churn/Contraction: Have they provisioned most of their seats? Have most of those users logged in?

Expanding with AI: Efficiency, efficiency, efficiency. Are they struggling with a lot of tickets? Are they repeating a lot of tasks/answers?

Expanding with Premier/Assist: Do they engage with our Support team often? Do they need a higher level of engagement from us?

Expanding with Assist: Are they low on internal resources? Is their Zendesk a mess?

Personas impact your discovery strategy

DISCOVERY

KEY PERSONAS

Who do we have on the call?

What is a persona?

Detailed, semi-fictional representation of your target customers that are informed by qualitative and quantitative data about existing customers and market research.

Why is it important to know?

Businesses build products to solve specific problems for specific groups of people in specific aspects of their lives. It requires a thorough understanding of those groups: what motivates them, what challenges they face, what goals they have, etc.

Personas help you understand your ideal customer and their goals, provide guidance on how to tailor discussions, and know the right questions to ask.

C-SUITE

CTO / CIO / COO

Core responsibilities:
Administer and manage technology, information, and data (CTO/CIO)

Bring operational, managerial and administrative procedures, reporting structures and controls (COO)

CUSTOMER EXPERIENCE

Support & Operations

Core responsibility:
Lead and coach teams of support representatives

EMPLOYEE EXPERIENCE

IT & HR

Core responsibility:
Responsible for managing the employee life cycle and benefits (HR)

In-depth technical knowledge to help the company manage its systems efficiently (IT)

Uncovering Goals

	WHO TO ASK	EXAMPLES
BUSINESS GOALS How will your solution support your customer's highest-level performance measurements—the goals you might find in your customer's management presentation or shareholder letter?	**C-SUITE** **VP+**	**Goals:** • Decrease costs • Increase revenue **Success Metrics:** • Cost per ticket/contact
DEPARTMENT OBJECTIVES How will your solution help your customer create a business or operational change at the department level? How do those changes ladder up to business goals and metrics?	**DIRECTOR+** **MANAGER+**	**Goals:** • Drive self-service • Increase ticket deflection **Success Metrics:** • Ticket volume • Self-service score
TEAM INITIATIVES How will your solution help your customer achieve the tactical changes necessary to support the department objectives?	**ADMIN** **TEAM LEAD**	**Goals:** • Optimize support workflows • Create customer 360 for agents **Success Metrics:** • First reply time • Full resolution time

Aligning with customers prior to your discovery call

DIQ Technique
Data - Insight - Question

According to our CX Trends report for 2024, 65% of CX leaders see AI as a strategic necessity. Leveraging AI for customer service effectively allows you to manage higher support volumes at scale while maintaining customer satisfaction and building customer loyalty. How has AI impacted your customer service operations so far?

Confirm topics + timing

- ❏ Make sure they know/ agree to your expected outcome
- ❏ Ensure you're covering the right amount
- ❏ Give them a chance to respond with other expectations

Clarify attendees (if possible)

- ❏ Send participants/ roles of your team
- ❏ Confirm they're bringing the right people
- ❏ Research the attendees to inform your approach

Covering logistics

- ❏ Encourage them to be on camera
- ❏ Find out if anyone has to leave early
- ❏ Agenda is familiar, easier to jump in to discovery when you meet

Prepare your questions

- ❏ Go into the call with prep notes and 10-15 questions that you'd like to cover
- ❏ Keep it open ended! **TED (Tell, Explain, Describe)**
- ❏ Let the conversation flow and breathe on its own, don't interrogate

DISCOVERY

C-SUITE

Common Titles: CEO, COO, CTO, CIO, CCO, CSO, CFO

Common exec responsibilities:

CEO: Communicates on behalf of the company, leads the development of short- and long-term strategy, implements the vision and mission.

COO: Ensures company is run in the most efficient way possible, maximizing profits and customer satisfaction. Typically lead the execution of a company's strategy, and ultimately be responsible for its performance.

CFO: Develops plans for growth to increase company profit while also reducing expenditure, identifies investment opportunities.

C-Suite executives are pressed for time. Keep discovery at 4-8 high-quality, open-ended questions to uncover their business needs.

Goals & Responsibilities

- Growth from new markets (either segments or adjacent fields)
- Create maximum value for the company's stakeholders
- Make a plan that incorporates all employee, customer, and organizational needs
- Increasing investments
- Digital transformation

Pain points

- Revenue reduction
- Uncertainty with revenue forecast
- Low employee morale
- Lack of competitive intelligence
- Lack of data to make decisions
- Cost exceeding revenue (unused technology)
- Economic uncertainty

Key concerns

- **Customer Satisfaction:** Customers are the lifeblood of any company – serving them properly and keeping them satisfied is critical to the success of any business
- **Optimal performance:** Optimal performance from all people and systems that work with customers as well as the flexibility to adapt to changing circumstances.
- **Cost Containment:** In spite of the focus on customer satisfaction most CX departments are cost centers so there will also be an interest in managing the costs of and understanding how it is performing.

Zendesk talking points

- Get closer to your customers, innovate with technology
- Increase agent productivity while maintaining employee satisfaction
- Visibility into dept performance against target KPIs
- Implement at a fraction of the time and cost of other vendors - 90% of customers deploy in 8 weeks or less
- Reduce costs (admin overhead)
- Agility and ability to pivot, open to new markets, easily and quickly
- Operational efficiency leading to incremental revenue and helping acquire new customers
- Focus on moving CX from cost to profit center with ecomm/upsell/cross sell abilities

CX PERSONA

DISCOVERY

Common Titles: Customer/Client Service, Customer Support, Customer experience, Digital Care, Contact Center, Global Support

Summary:

The Dir/VP/Head of CX is responsible for running customer service, and is involved in both strategic long-term planning as well as day-to-day delivery/execution.

Potential to be the economic buyer

Goals

- Demonstrate the value of their department to the business via revenue increase, cost reduction, customer satisfaction, retention, and upsell
- Gain access to executive level to leverage customer knowledge and be the voice of the customer, establishing a customer feedback loop
- Make life easier for agents and improve efficiency and productivity
- Stay ahead of disruptive competitors, keep up with customer expectations by delivering a modern CX

Responsibilities

- Deliver excellent customer experiences with minimal downtime; fast recovery time if there are outages.
- Deploy a changing mix of experiences across channels
- Support fast resolution time metrics across multiple channels
- Provide real-time visibility to effectively manage the workforce, improve business processes and enable agility
- Create revenue opportunities

Pain points

- Complex workflows that are difficult to maintain
- Rapid growth with unscalable channels, high volume of requests
- Data silos resulting in poor CX + Lack ROI metrics for CX investments
- Slow response times / reduced productivity affecting service quality
- Not able to offer self-service
- Knowledge is locked up in the heads of experienced agents
- Loss of revenue from poor CX

KPIs

Customer Relationships:

- CSAT, CES (Customer Effort Score)
- Increase Customer Loyalty: NPS, CRC (Customer Retention Cost)

Performance Management:

- Hitting revenue and churn numbers
- Capacity planning, agents productivity, time-based metrics (FRT, AHT), ticket deflection, SLAs,

Organization Cost/Value:

- Cost per ticket, Cost per channel, Revenue influenced, # of touches per ticket
- Volume by channel, time to solve

Understanding & alleviating concerns

Key Initiatives & Objections

- Inadequate systems, looking to upgrade and modernize. Not easy to make changes, too expensive to maintain. Some will be new to cloud tech.
- Reporting is siloed across channels, not meeting critical KPIs
- Trying to be innovative against the competition, newer companies taking market share with awesome experiences
- Keep up with growth in interactions, maybe want more self-service interactions
- Want tech that reduce costs, has low TCO
- Want to add incremental revenue and to turn from cost to profit center (eg. expanding globally)

How Zendesk will help them

- Agile, flexible, customer engagement tool with built-in best practices for quick configuration and fast TTV. TCO much lower than competitors
- Easy to use reporting thats unified across channels inside Zendesk for fast insights
- Beat the competition with a deeper understanding of who your customers are by connecting any app across your organization and historical cross-channel views
- Move away from phone and scale with chat/messaging. Roll out a better self-service and AI strategy to deflect inquiries to efficient channels to save costs w/o sacrificing great CX.
- Maximize agent productivity with API-first platform that surfaces rich, contextual, relevant data at the right time to make agents as efficient as possible to reduce AHT, resolution time and save costs

DISCOVERY

IT PERSONA

Common Titles: IT, IT Ops, Tech Services, Information Security, Digital Transformation Enterprise Architect

Summary:

Oversees IT operations for the entire organization, including the business applications and technology platforms that are the backbone of the customer support organization.

Potential to be the economic buyer

Goals

- Providing strong technical muscle across the entire business
- Creating alignment across the org with technology
- Accelerating innovation with the changing pace of tools and software available
- Delivering scalable applications that maintain desired overhead
- Ensuring business tech is running smoothly
- Digitally transform the enterprise, including the customer shopping experience

Responsibilities

- Consolidate tools/tech stack
- Ensure internal employees make upgrades to apps, devices, for security, performs quality and testing
- Flexibility and extensibility in vendor offerings
- Extensible solutions that are well supported and integrate well into existing infrastructure / tech stack
- Timely implementation

Pain points

- Slow and cumbersome tools like SFDC, Too much maintenance for legacy infrastructure
- Competing departmental priorities, data silos
- Large, often conflicting responsibilities of all things IT across the company
- Under pressure to keep budget low, limited headcount
- Downtime, risk mitigation and loss of revenue
- Receiving lots of data requests from various stakeholders, unscalable

KPIs

Cost

- # of admins required
- Time, cost, scope to implement

Payback period

- Maintenance costs
- Cost per internal employee support
- TCO, ROI, expenditures

Employee Satisfaction

- One touch tickets, FRT, TTR, AHT
- Agility & project delivery
- Time to market, IT resource utilization, project budget adherence

DISCOVERY

IT PERSONA

Understanding & alleviating concerns

Key Initiatives & Objections	How Zendesk will help them
- Modernizing and consolidating the techstack, Cloud vs on-prem - De-risking the project as it affects customer experience - Data privacy, encryption at rest and in flight; Security - integration with existing auth tech (SSO); Compliance - HIPAA, Schrems II, etc. - Implementation time/budget - in house/partners? Running long-term costs - Inability to scale, integrate with SFDC well - Platform extensibility with other systems	- Best-in-class cloud CX platform built on AWS with omnichannel capabilities and reporting OOB in single interface. - Reliability & Data Security: Deploy in a manner that is compliant with relevant data protection requirements (HIPAA / PCI / SCHREMS II, etc.) - Offer ProServ, consulting, training, and support pre/during/post implementation with Zendesk or partner) - Zendesk data privacy and protection - SSO Marketplace apps - Implementation at a fraction of the time and cost of other vendors, minimal admin/low overhead costs - SFDC integrate or switch - Data flows in and out easily - Open Platform with no code, low code and pro-code built for any business need

EXECUTIVE DISCO Q'S

Focus Area	Discovery Questions
Customer Satisfaction	• Tell me about your company mission and it's overall approach to its customers • Tell me about your customer-facing brand • How does your company prioritize CX across the organization? • Which executives are most involved and/or interested in the CX organization & for what reason? (For example, CIO takes interest in CX's software solutions as well as information security or CEO has interest in CSAT and conversion) • Is there anything on the product roadmap that would be a major driver of revenue in the upcoming 6-12 months?
Optimize Performance and Efficiency	• What customer experience and employee experience metrics are most important to the C-Suite? • How is [known pain] presenting itself as a problem to the business? • What does operational success look like over the next 6-9 months? • How has AI impacted your operations so far? • Can you walk me through the process of how your team evaluates and selects strategic initiatives to pursue? • What key performance indicators (KPIs) are most important for you when making decisions about resource allocation for strategic initiatives? • When it comes to decision-making, what role does data and analytics play within your organization?
Cost Containment	• Do you or anyone else in the business have hesitations with the current state of our partnership? • Where is the business investing? • What is the budget for your CX/EX program?

CX PERSONA DISCO Q'S

DISCOVERY

Challenge	Discovery Questions	Focus Areas
Improve Customer Experience	• What does your customer journey look like? • How are customers routed to the correct person to respond to their inquiry? • What are the main communication channels your customers use? • Tell me about your current customer service efforts? What channels do you offer? What channels drive the greatest inbound volume? • Is customer experience a differentiator for you? For your competition? • What channels are your competitors providing that you are not? • How are you supporting the mobile messaging channels that customers are using today? • How do you measure customer sentiment? • Describe how personalized the support your agents offer to your customers is? What would you need to have a complete view of the customer to provide more personalized service? • Do you have an understanding of how customer loyalty / churn relates to your CX? Have you analyzed whether customers leave after negative support experiences? • How is knowledge accessed, organized and presented to online customers?	• Higher CSAT & Retention - deflect / deter costly voice interactions to digital channels by providing digital options (like self service) • Know your customers - complete historical context to build the best customer experiences; uncover trends to gain operational efficiency • Provide omnichannel support at scale – allow customers to interact with your brand seamlessly in the way they want to – through self-service, chat, phone or messaging. • Utilize help center and community forums as your first line of defense, letting customers self-serve especially for simple or common issues. • Embed support everywhere to get closer with customers and make it easy for them to interact
Improve Agent Satisfaction & Reduce Turnover	• How do you train your agents? • How can you make sure that your agents are consistent with brand across various channels? • How problematic is agent turnover in your organization? Do you know why? • How often do you have to train new agents on the tools and processes at hand? • How easy is it for your agents to collaborate with internal staff to resolve issues? • Does your existing platform support the way your agents want to work?	• Empower productive, happy agents – complete customer data in one agent interface, eliminating context switching and delivering personalization—no matter the channel • Unify agent workspace for every channel with customer data from other sources via out-of-the-box or custom integrations so agents have the context they to deliver personalized support at scale. • Collaboration- connect agents with internal experts to resolve issues quickly on the first try • Reporting- train agents based off KPIs and feedback you can measure

CX PERSONA DISCO Q'S

Challenge	Discovery Questions	Focus Areas
Improve Productivity	• Do agents receive a lot of repeat inquiries on the same topics? What is your strategy to mitigate that? • Do agents consistently have the right information to solve issues? Are you connecting all business data in a unified source? • How are you thinking about self-service, bots, and automation to reduce the need for human interactions and boost agent productivity? • How do agents communicate with subject matter experts? • Are your agents able to easily find resources to help them do their jobs? • How do you measure your team's success?	• Manage demand with AI and self-service – Get the best answers, fast and help customers help themselves, deflecting tickets with self-serve • Removes silos and gives agents access to internal experts via collaboration tools directly in the agent interface so they can ping teammates for help. • Automate conversations through AI by surfacing highly relevant, targeted self-service content based on the context of customer issues for faster resolution.
Drive Operational Efficiency	• With all the changes in the last 2 years, have you had to reduce or increase support headcount? • How many agents do you have? Where are they located? • Have you experienced any increases or changes in inbound support requests? • How easy is it for your agents to handle support requests from multiple channels? • What happens when there is a surge in a particular channel? • What is the process to add new users or scale during times of high demand? • What are your desired outcomes? Engagement, conversion, containment, automation? • How are you currently measuring response & resolution times? What percentage of interactions are your agents able to resolve in one contact? • Do you provide 24/7 support? What are your growth plans in the next 1-3-5 years?	• Ensure your team can get up and running quickly by keeping knowledge bases up-to-date and making external data sources easily accessible. • Combine enterprise-class security features with an open, flexible cloud platform that lets you own the entire customer experience today and quickly evolve tomorrow. • Uncover actionable insights to improve operations by trend spotting patterns in customer and service team activities.

IT PERSONA DISCO Q'S

Challenge	Discovery Questions	Focus Areas
Infrastructure / Platform	• Tell me a bit about the applications your team uses regularly? How do your technologies play together? Are there gaps? • What types of integrations are needed for your customer engagement solution? • What data are you able to pull from your existing systems to monitor KPIs? • How do you manage changes to the technology stack and configuration as business needs change? • How long does it typically take to integrate a new application or business intelligence source into your existing business process? • What challenges are you facing when thinking about implementing a new solution for customer engagement? • How are you enabling agents to work from home? • When you get a request from your CX department, how quickly are you able to turn it around? • How do you think about how to get ahead of trending or emerging issues? • How are you thinking about your resources as your business is scaling? • How do you share your CX data across the organization? • What is your strategy for managing workload in a distributed environment?	• Integrate with all relevant customer data sources using powerful integration options, including low-code and no-code functionality • Open, flexible APIs that can be customized to work with apps, integrations, and other data sources. • Deploy tools built on open standards designed for a modern experience so developers don't need to learn any new or proprietary languages (e.g. Salesforce: APEX, SOQL, etc)
Process Efficiencies	• Tell me a bit about the applications your team uses regularly? How do your technologies play together? Are there gaps? • What types of integrations are needed for your customer engagement solution? • What data are you able to pull from your existing systems to monitor KPIs? • How do you manage changes to the technology stack and configuration as business needs change? • How long does it typically take to integrate a new application or business intelligence source into your existing business process? • What challenges are you facing when thinking about implementing a new solution for customer engagement? • How are you enabling agents to work from home? • When you get a request from your CX department, how quickly are you able to turn it around? • How do you think about how to get ahead of trending or emerging issues? • How are you thinking about your resources as your business is scaling? • How do you share your CX data across the organization? • What is your strategy for managing workload in a distributed environment?	• Rapidly deploy any channel when needed so it's convenient to connect with customers across any device, immediately. • Enable your support department teams to be more self-sufficient, freeing up your staff for more strategic work • Create agile, powerful workflows that simplify business processes with clicks not code for happier, more productive agents. • Customize and maintain your support operations with ease and flexibility to customer your solution as your business needs change.

IT PERSONA DISCO Q'S

DISCOVERY

Challenge	Discovery Questions	Focus Areas
Reduce TCO and achieve fast time to value (ROI)	• How do you deploy new tools? (in-house, partners, vendor, combination?) • How important is speed to your deployment? • How do you measure the cost of ongoing maintenance of your support tools? • How do you evaluate the cost of your CX? How do you respond to shifts in the business?	• Reduce the number of vendors you have to deal with while providing a more consistent customer experience across the entire enterprise • Out of the box reporting capabilities, unifying reporting on all channels across the platform in one consolidated tool, with reports and dashboards
Security, Compliance, Availability	• What data, security, compliance requirements are needed at your business (GDPR, HIPAA, etc.) • Have you had an outage before? How long were you down for ? • Do you have a security breach plan in place? What does it look like? • Are you currently able to provide 24/7 global support to customers?	• Improve the reliability and data security in your systems by moving to the cloud • Easy to use management and administration tools with built in best-practices from CX experts • Zendesk is built on an enterprise-level operations & technology architecture that exceeds industry standards and future-proofs your business.

Discovery is successful when you leave knowing...

1
Short and long-term goals

What's your vision for the customer and business over the next 12 months?
What are your strategic goals for this year?
What's on your whiteboard for the next 3 to 6 months?

2
Use-case

Which teams are using Zendesk?
What does your customer base look like?
What kinds of inquiries do you receive? How do you treat these questions?
**Dig in with more channel-specific questions if needed*

3
Measures of success

How do you measure customer satisfaction or loyalty?
What KPIs are you and your team tied to?
You shared your goals – how do you plan to measure success against those goals?

4
Pain points and blockers

Where can Zendesk do better – with the product and your overall experience?
Are there any barriers to success in your way right now?
**Any similarities in their recent Z2 tickets?*

5
Sentiment (and intent to renew)

You've been a customer for X years now – how are you liking it?
With your renewal coming up, are there any things you'd like to discuss that would improve your experience with Zendesk?
**Does Support love Zendesk, but Finance hates it?*

Full list of questions can be found [here]

CREATING HYPOTHESIS

Why? Hypothesis serve as your storyline. They will help you build a narrative behind your recommendations

Everything you have learned from collecting the info need to be analysed and digested into hypothesis that you can then leverage in your discovery to better understand how you can bring value to your customer.

STEP 1: Look at all the info you collected in a glance

Use this document to help you look at them in a glance

STEP 2: Analyse and come up with hypothesis

What does the data tell you? Who do you have in front of you? What might they be trying to achieve? Write it down

STEP 3: Write down the questions to test your hypothesis

This will help you have a talk track for the call and complement your research with relevant information that will help you build the story behind your recommendations.

NOTE: Your hypothesis will be highlighting pain points your customers might be facing that you will be able to help them with (bring a plan)

Examples!

If we see this:

Increasing month on month ticket volume
+
high one touch tickets (above 80%)
+
increasing First Reply time

High number of shared views +
high numbers of user views +
high number of personal and shared macros +
higher than benchmark full resolution time
and/or first reply time AND/OR low CSAT

What hypothesis can we make?

Customer is scaling fast and is struggling with it

Customer's current set up is causing inefficiencies and slowing down agents, they need to figure out their own workflows to work their tickets and are not finding the macros they need, all of that is causing them to waste time and therefore impacting the FRT negatively

Common Strategic / Executive Objectives

Improve retention and CSAT by improving CX/EX

Decrease costs while servicing more customers

Create a consistent cross-brand experience

Implement a Seamless Cross-Channel Strategy

Decrease IT Dependency & Consolidate systems

Increase self-service

NOTE: Useful doc for questions inspo

The In-Between:

The blueprint period between discovery and providing recommendations

How to make the most out of this time

1. Review your call recording, meeting notes, pre-discovery findings and any helpful comms from the customer. **Understand where they are and where they want to go.**
2. **Identify 3-5 recommendations.** Don't overwhelm them with too much. Keep in mind that some recommendations require several steps to implement. Reference this for help in connecting their goals to Zendesk.
3. **Leverage your resources** for advice and confidence checks. Lean into SMEs, specialized slack channels, Help Center, fellow CSMs, etc.
4. **Start building your deck**/success plan/follow-up email. Keep it clear and concise. Don't recreate the wheel each time – tap fellow CSMs for their slide libraries! Take an opportunity to build your own!

Meeting Checklist

Account Information

- Who is the Account Manager?
- When is their Renewal date and term?
- What subscription are they currently on?
- Do they have any open tickets (Support, Finance, Renewals)?

Utilization Metrics

- How many agents seats are being utilized?
- How is their First Reply Time?
- What is their Self Service score?
- What is their CSAT score?
- What is their percentage of one-touch tickets?

Customer Data

- What does the company do?
- How is the support portal designed or structured?
- Overview of their previous engagements with Success (if applicable)
- Is the company in the news for anything? Industry trending?

Engagement Models

Two-Touch

Average 60 mins total, bi-annual

[Dedicated discovery (30 mins) **+** account review/recommendations (30 mins)]

One-Touch

From 30 to 60 mins, bi-annual

Combined discovery **+** on-the-spot solutioning **+** robust follow-up/success plan

Choosing between models is always based on ***customer need***. Your **default should be two touch** unless you feel the customer got what they needed from the initial call.
Don't sacrifice quality over quantity.

Two-touch recommended if...

Before the call:

- CTA is indicated as **High Priority**
- risk indicators: customer doesn't see the value, doesn't understand their configuration, etc.
- decision maker/stakeholder present on call
- renewal date within 3 to 6 months

During the call:

- bad customer sentiment on call where a second touch could smooth things over
- complexity of problem/solution – next steps would be better communicated over a call vs. in an email
- ran out of time with outstanding items on both sides
- not feeling like you've provided enough value eg. lack of engagement from customer, customer seems overwhelmed, customer says they didn't find it valuable

Other Considerations:

- you are not able to identify the customer priorities after the first call
- you did not understand their goals, short and long term

Engagement TYPES

Onboarding

Risk identified in net new customers within 30 days post-purchase

Adoption

Risk identified through signs of low utilization

Retention

Opportunity to retain customers at key milestones and indicators

ONBOARDING

Onboarding is the compass that sets customers on the path to success and unlocking Zendesk's full potential

Why is Onboarding important:

Onboarding is a pivotal time in the customer lifecycle and it's our opportunity to assure them that they made the right decision in choosing Zendesk. If we see low utilization within their first 30 days, we call this **onboarding risk**.

What is a CSM's role in Onboarding:

- **Solidify the partnership** and commitment to their success.
- **Align on objectives** – understand what they want to do with Zendesk as a whole, and what needs to be accomplished shorter term.
- **Communicate the areas where you see low utilization** and *why* that's a red flag. Inform them how it impacts their success and confirm understanding and commitment before moving forward.
- **Share the path forward** to achieving their goals and get their buy-in. This may involve some follow-up items on your end and commitments on their end.

Adoption as a metric

Why is Adoption important:
For customers to see their ROI they must truly adopt Zendesk. CSMs can help customers actualize the value once they understand what is causing the adoption risk.

What can cause adoption issues?

- Misaligned on goals - they don't see the value
- Bad product fit
- Product knowledge gap / user error
  - They don't know the full range of capabilities
- Not using the product effectively
- Encountering frequent issues
- Potential churn risk – slowly migrating off Zendesk
- They're unsatisfied and they tell us

What is a CSM's role in Adoption:

- **Ensure the customer has shared their strategic goals** and that their configuration is optimized to achieve those goals
- Create a **recommended learning path** using training resources
- **Review ROI –** you've invested, now commit because the outcomes will be ICONIC!
- **Reinforce the partnership** and your commitment to their success

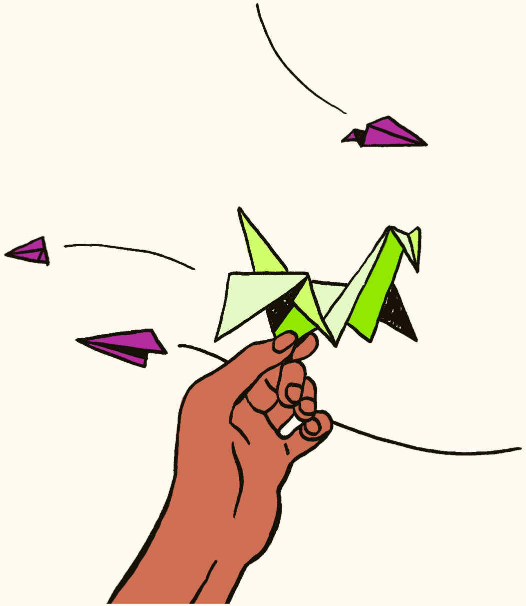
ADOPTION

Meeting Enablement

How to approach these meetings

As CSMs, we understand that simply adding Triggers and other rules will not fully resolve a customer's workflow challenges or implementation issues. **However, these tools are essential for constructing effective workflows and addressing routing inefficiencies.** Underutilization of these basic rules indicates a **statistical risk** related to customer churn and future product adoption.

When engaging with these customers, leverage this data as an opportunity for deeper discovery. Keep in mind that **data alone doesn't provide the complete picture;** there will always be unique use cases where these tools may not yield significant benefits.



ADOPTION

ADOPTION DATA

CRM Account Name	Market Segment (Filtered Currently to Remove Digital)	Region	Customer Age	Go Live Date	Renewal Date	Success Owner	Health Status	Net ARR	Provisioned Agents	# Basic Tools & Rules Adopted	# Views	# Macros	# Triggers	# Autor
Shawbrook Bank	3.Commercial	EMEA	2 yr	5/18/2021	7/8/2025			$27,839	b) 2-9	0	0	0	0	
SilverRide	1.Digital	AMER	5+ yrs	1/3/2021	9/18/2026			$25,272	c) 10-49	1	3	0	34	
Ortec BV	4.Mid-Market	EMEA	<1 yr	11/20/2024	9/30/2027			$93,546	b) 2-9	0	0	0	0	
SAS SEGM BHV	4.Mid-Market	EMEA	<1 yr		9/13/2028			$82,426	b) 2-9	0	0	0	0	
CHC Solutions Inc.	1.Digital	AMER	5+ yrs	1/5/2021	12/15/2024		Green	$25,272	c) 10-49	2	11	9	12	
D-Market Elektronik Hizmetler ve Tic. A.Ş.	4.Mid-Market	EMEA	5+ yrs		2/7/2025		Green	$50,451	b) 2-9	0	0	0	0	
DITO Hotel Management GmbH & Co. KG	4.Mid-Market	EMEA	<1 yr		8/31/2027			$45,603	b) 2-9	0	0	0	0	
Robinhood Markets, Inc.	4.Mid-Market	AMER	5+ yrs	1/1/2021	3/29/2025	Kyle Vrooman	Yellow	$42,911	b) 2-9	0	0	0	0	
PlacePass	1.Digital	AMER	5+ yrs	1/1/2021	6/28/2025			$25,141	c) 10-49	0	0	0	0	
Allwork	2.SMB	AMER	5+ yrs	1/4/2021	3/15/2026	Angi Butler	Green	$67,980	c) 10-49	2	11	61	1	
CyberPowerPC	2.SMB	AMER	5+ yrs	1/1/2021	12/30/2025	Emma Collins	Green	$80,940	c) 10-49	2	17	5	51	
Vitaminpacks, Inc. d/b/a Persona Nutrition	2.SMB	AMER	5+ yrs	1/1/2021	12/29/2024	Emma Collins	Green	$67,410	c) 10-49	2	4	417	10	
EcoVadis	4.Mid-Market	EMEA	5+ yrs	1/4/2021	11/14/2025	Valérie Moysan	Red	$30,240	b) 2-9	0	0	0	0	
Inglewood Park Cemetery	2.SMB	AMER	5+ yrs	1/4/2021	12/14/2024	Emma Collins		$65,700	c) 10-49	2	2	0	13	
Monclick	4.Mid-Market	EMEA	2 yr	2/9/2023	1/1/2025	Eduard Sales		$28,104	b) 2-9	0	0	0	0	
Shields Health Solutions Holdings, LLC	2.SMB	AMER	5+ yrs	1/4/2021	6/24/2025	Emma Collins	Red	$59,892	c) 10-49	2	11	165	9	
EyeSouth Partners	2.SMB	AMER	5+ yrs	1/4/2021	4/29/2025	Emma Collins	Green	$52,728	c) 10-49	1	5	0	8	
Keolis SA	5.Enterprise	EMEA	<1 yr	7/28/2024	3/29/2025	Valérie Moysan	Green	$66,492	b) 2-9	0	0	0	0	
Beijing Zitiao Network Technology Co., Ltd.	5.Enterprise	APAC	<1 yr		8/22/2025		Red	$85,740	b) 2-9	0	0	0	0	
Stone Pagamentos	5.Enterprise	LATAM	5+ yrs		6/19/2026		Churning	$79,675	b) 2-9	0	0	0	0	
Experiencias Xcaret Web SAPI de CV	5.Enterprise	LATAM	1 yr	6/23/2023	1/31/2025			$58,140	b) 2-9	1	0	0	1	
Cathay Pacific Airways - Online Check-in	5.Enterprise	APAC	4 yr	1/1/2021	12/2/2024		Red	$47,928	b) 2-9	2	1	0	2	
Konecta France	5.Enterprise	EMEA	<1 yr	4/3/2024	3/15/2025			$40,919	b) 2-9	0	0	0	0	
NEC Platform Technologies Hong Kong Limited.	5.Enterprise	APAC	4 yr	2/5/2021	12/1/2024			$40,584	b) 2-9	0	0	0	0	
Asendia France	5.Enterprise	EMEA	<1 yr		9/27/2027			$40,432	b) 2-9	0	0	0	0	
Maymont Homes	2.SMB	AMER	5+ yrs	1/4/2021	1/4/2025	Emma Collins		$48,384	c) 10-49	2	32	6	16	
Trifecta Multimedia	2.SMB	AMER	5+ yrs	1/4/2021	11/6/2025	Emma Collins	Red	$46,788	c) 10-49	2	7	26	5	

The Product Adoption Data will live on an external Google Sheet until it's available in Gainsight. The left-hand side will list the Account Name, whereas the right-hand data will show either **Adoption** (Green) or **Under-Adoption** (Red). A few items to note about the data:

- This is shown at an Account-wide level, so it includes all the instances.
  - Each Instance is aggregated by Agent-band and added features, so the smaller instances should have minimal impact on the overall adoption.
  - Connect with the largest ARR instance.
- The data will *not* show system-created rules, only user-generated rules. This is how we are showing either Adoption or Under-Adoption.
- Please utilize the *Basic Tools and Rules Not Adopted* tab to gather this data.

ADOPTION

Core Feature Utilization Discovery

Feature	Application	Opportunities/Pain Points	Example Discovery Question
TRIGGERS	Actions when a ticket is created or updated	• Seeking to route premium tickets to a Tier 2+ team • Just utilizing Email and unsure how to implement a new channel • Items not being assigned to tickets correctly	"What challenges or bottlenecks have you encountered in your support processes? Are there recurring issues that seem to slow down your team's efficiency?"
AUTOMATIONS	Time-based actions	• Customer has a large ticket backlog and unsure how to effectively manage it • Long First Response/Full Resolve times • Customers not responding to CSAT	"How do you track and manage response times and follow-ups with customers? Are there areas where you feel improvements could be made to speed up these processes?"
MACROS	Series of actions within a ticket when selected by an Agent	• Challenges with Agents taking too much time on tickets/Agent Efficiency • Agents incorrectly assigning tickets to Groups • Challenges with collecting custom ticket data in reporting	"What goals do you have for your customer support team regarding response times and quality of service? Are there specific metrics you aim to improve?"
VIEWS	Organized filters on tickets	• Too many Views, causing disorganization in the Agent Workspace • Agents have challenges finding the correct tickets • Not enough Views causing challenges in ticket	"How do you monitor and manage response times for incoming inquiries? Are there areas where you believe improvements could be made to enhance speed and efficiency?"

ADOPTION

BEST PRACTICES

RETENTION

Why is retention important:
Enhance customer retention by ensuring customer sees value, addressing issues promptly, and aligning your efforts and recommendations with your customers' objectives. Continuous improvement and proactive engagement are key to building long-lasting partnerships and maximizing customer success. Retention CTAs include **Pre Renewal** and **Re Engagement** CTAs

What is a CSM's role in retention:

- Use data to inform outreach timing and discussion points
- Ensure customer has communicated their goals and that they understand how Zendesk helps them achieve those goals
- Identify areas for optimization and align them to their goals
- Proactive, relevant communication —
  - Feature releases
  - Upcoming events
- Celebrate wins! – Show them the value they've achieved
  - Increased CSAT QoQ
  - Decreased cost per ticket
  - Improved self-service ratio

Engagement Decks and Resources

Onboarding

Discovery library
Onboarding deck template

Success Plan template
Email follow up template

Adoption

Discovery library
Adoption CTA enablement

Success Plan template
Email follow up template

Retention

Discovery library
Discovery deck template

Account Review template
Success Plan template
Email follow up template

Complete these Gainsight tasks throughout each engagement

At the end of your engagement you will deliver a Success Plan

Success Plans offer personalized recommendations through both a **strategic and tactical lens**. These documents are high-level enough for a VP stakeholder and easily actionable by an Admin.

These documents are also great snapshots and reference points for your ongoing engagements with the customer as well as any future CSM or AE to utilize.

A Success Plan should be an agreement between you and the customer.

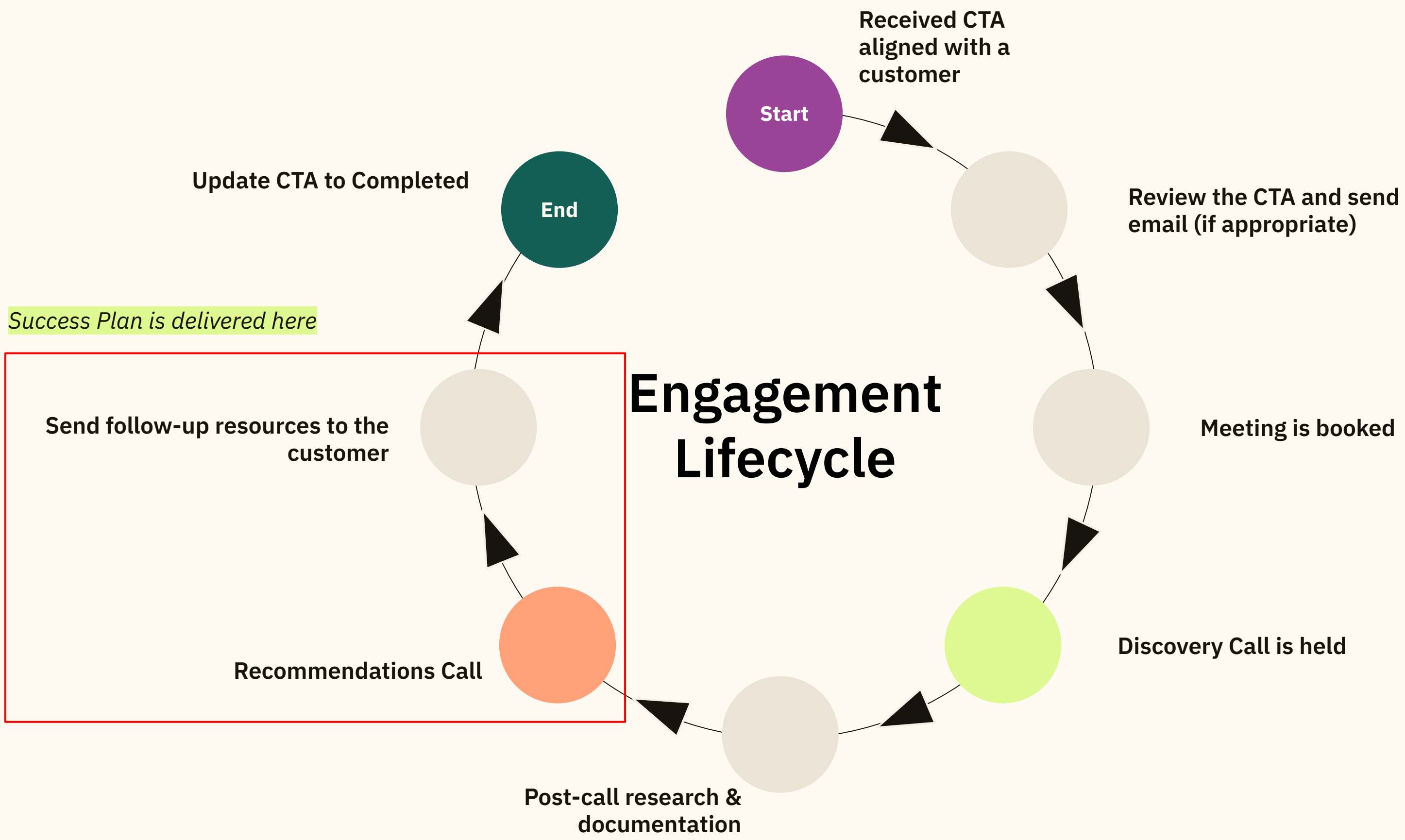
When to deliver a Success Plan

Delivering the Success Plan concludes your Engagement. As a reminder, delivering **30 unique Success Plans per quarter** is a core KPI in 2025.

When you believe that you are able to deliver high-quality and personalized recommendations, that is the best moment to present the Success Plan to the customer—in most cases this is during the Recommendations Call.

Please include the Success Plan on your Recommendations Deck. We're advising this to be on the first slide so our Account Teams can easily view it.

Lifecycle of an Engagement



Methodology

Components of the new Success Plan

Objective
2-3 line Summary noting the customer's current state of the business, overall challenges, and desired outcome following a completed Success Plan

- What do you think needs to happen for this customer to be more successful with Zendesk?
- Consider: How are all of these strategies/goals connected? What is the customer wanting to achieve?

Goals
High-level goals taken from our CX Goals which align with the proposed strategy and outcome

- Listed on slide 12

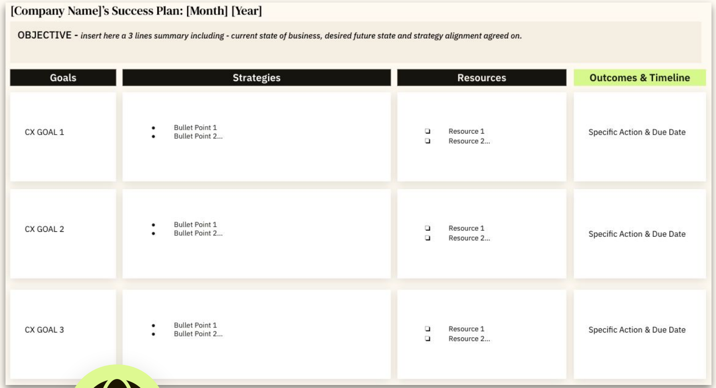
Strategies
Personalized and actionable steps the customer is recommended to take to achieve their desired outcome

Resources
Links to content which will help advise the customer on the strategies being proposed

- Help Center/Community content
- Personalized videos

Outcomes & Timeline
Specific and personalized outcome with an estimated date of completion

- Specific task w/ an estimated completion date


[Company Name]'s Success Plan: [Month] [Year]

OBJECTIVE - *insert here a 3 lines summary including - current state of business, desired future state and strategy alignment agreed on.*

Goals	Strategies	Resources	Outcomes & Timeline
CX GOAL 1	• Bullet Point 1 • Bullet Point 2...	❑ Resource 1 ❑ Resource 2...	Specific Action & Due Date
CX GOAL 2	• Bullet Point 1 • Bullet Point 2...	❑ Resource 1 ❑ Resource 2...	Specific Action & Due Date
CX GOAL 3	• Bullet Point 1 • Bullet Point 2...	❑ Resource 1 ❑ Resource 2...	Specific Action & Due Date

Pro-Tip: Use ChatGPT to help with your initial Success Plan verbiage!

[Company Name]'s Success Plan: [Month] [Year]

OBJECTIVE - *insert here a 3 lines summary including - current state of business, desired future state and strategy alignment agreed on.*

Goals	Strategies	Resources	Outcomes & Timeline
CX GOAL 1	• Bullet Point 1 • Bullet Point 2...	❏ Resource 1 ❏ Resource 2...	Specific Action & Due Date
CX GOAL 2	• Bullet Point 1 • Bullet Point 2...	❏ Resource 1 ❏ Resource 2...	Specific Action & Due Date
CX GOAL 3	• Bullet Point 1 • Bullet Point 2...	❏ Resource 1 ❏ Resource 2...	Specific Action & Due Date

Fruits and ZenTable's Success Plan: December 2024

EXAMPLE

OBJECTIVE - *Fruits and ZenTables is looking to enhance their customer support capabilities by expanding from Email and Web Form to additional live channels, in order to fully leverage their Suite Professional plan. Current implementation challenges with foundational tools and the lack of self-service options are impacting their ability to improve resolution times. Our strategic aim is to empower the team with a deeper understanding of Zendesk's core functionalities and to create a Help Center that supports these initiatives, ultimately driving faster resolution times and improving self service ratios by Q2 2025.*

Goals	Strategies	Resources	Outcomes & Timeline
BECOME EMPOWERED AS A ZENDESK ADMIN	• Take the Foundational Support Learning Path Zendesk Training to get a greater understanding of the Zendesk Support Ecosystem from an Admin perspective. • Review the additional trainings on the Training website for any key features that you'd like a greater understanding of.	❏ Foundational Support Learning Path ❏ On Demand: Triggers ❏ On Demand: Automations	Complete the Foundational Support Learning Path by end of Q1'25
ADOPT GUIDE FOR SELF-SERVICE	• Guide is a Help Center platform designed to promote self-service, deflect tickets, and promote the appropriate channels for your customers to connect with you on. • In order to have an optimized Web Widget, you're going to need articles for your bot to suggest to customers to help them self-serve. • Start building Help Center articles to get accustomed to Guide (these don't need to be published at this point).	❏ Planning your self-service content structure ❏ Creating and editing articles in the knowledge base	Create 3 unpublished articles by 1/31/25 Improve self service ratio from (X) to (Y) by Q2
IMPROVING RESOLUTION TIME	• Your team is struggling with resolving tickets on time, leading to a challenging experience for your Agents and customers. • I recommend implementing SLA's, focusing on First Reply and Next Reply Targets, then expanding to additional Targets if your reporting is still showing high resolution times.	❏ About SLA policies and how they work	Implement an SLA with First Reply and Next Reply Targets by 2/28/25

SUCCESS PLAN

CX Goals

We've organized slides within our LiveDocs into 21 different CX Goals. Aligning with this process, please choose a CX Goal for the leftmost column which most closely resembles the desired Outcome.

Likely, your customer's outcome will fall under a few of these goals. Choose the one that would most relate to the personas/stakeholders involved in the Zendesk implementation.

CX Differentiator

Improving Metrics

Product Expansion

Retain & Grow Revenue

CX GOALS

Improve Cross-Department Collaboration	Become Customer-Centric/CX Differentiator
Improve Employee Experience	Enhancing Omnichannel Experience
Maintain Customer Base	Leverage Data to Improve CX
Personalized Customer Experience	Optimize the Customer Journey
Scaling Customer Service	Improve Customer Loyalty
Improving Quality of Interactions	Improving CSAT
Agent Efficiency	Improving Resolution Times
Channel Expansion	Implementing Self-Service
Implementing AI for Efficiency & Self-Service	Proactive Support
Increase Revenue w/ Proactive Sales	Restructuring Company/Merge to Retain CX

Reducing Operating Costs

Follow-Up / Gainsight

zendesk

You can deliver a Success Plan to the customer in two ways

In a meeting

The best outcome for delivering a Success Plan is at the end of the Recommendations Call as part of your deck. By doing this action on a call, you're able to secure alignment with the team you're speaking with and revise any strategies or timelines on the call.

Following the call, send the Recommendations Deck via email (including the Success Plan).

Over email

There are cases where a customer is either unable to meet for a Recommendations Call, or you were able to answer all questions in the Discovery Call and determine the Recommendations Call would not be the best use of the customer's time.

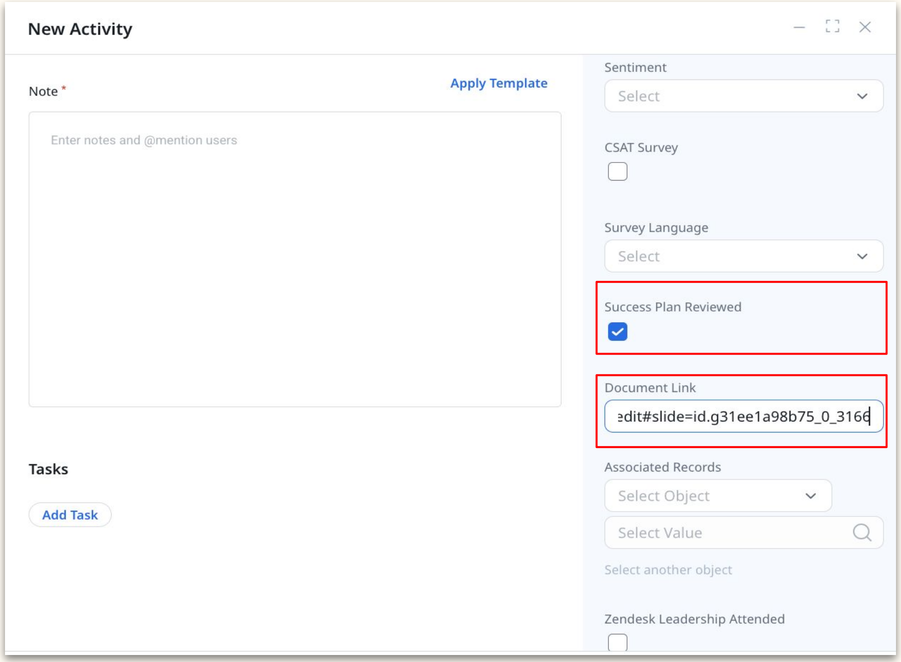
In these events, send your completed Success Plan to the customer via email and CC your Manager.

Gainsight

How do I log Success Plans in Gainsight?

1. In Gainsight, **paste a sharable link to the Document Link field in the Success Plan Check-In Timeline Activity.** This link should include the Success Plan deck (or recommendation deck if success plan is included).
2. Once logged, the link will be updated on the *Link to Success Plan* field
   a. This can be found on the Company page > Attributes.

As a reminder, please ensure that you're navigating to the Timeline from the Cockpit in Gainsight.



Resources

zendesk

Click the image below to navigate to the Success Plan template

[Company Name]'s Success Plan: [Month] [Year]

OBJECTIVE - *insert here a 3 lines summary including - current state of business, desired future state and strategy alignment agreed on.*

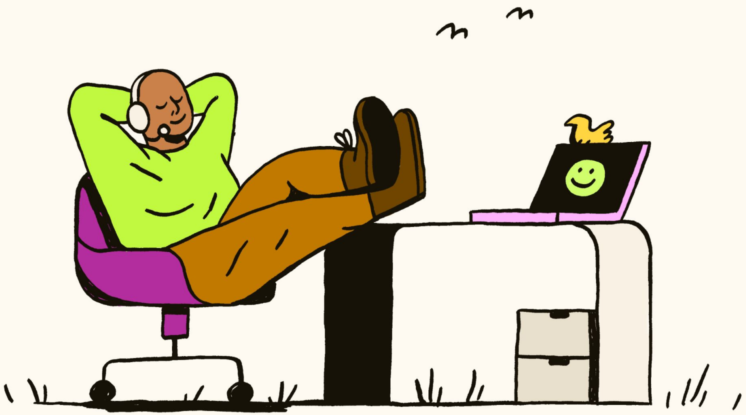
Goals	Strategies	Resources	Outcomes & Timeline
CX GOAL 1	• Bullet Point 1 • Bullet Point 2...	❏ Resource 1 ❏ Resource 2...	Specific Action & Due Date
CX GOAL 2	• Bullet Point 1 • Bullet Point 2...	❏ Resource 1 ❏ Resource 2...	Specific Action & Due Date
CX GOAL 3	• Bullet Point 1 • Bullet Point 2...	❏ Resource 1 ❏ Resource 2...	Specific Action & Due Date

ChatGPT Resources

You can leverage ChatGPT to help build a foundation for the Success Plan. You will need to add in more specificity to the Strategies, Resources, and Timeline. As a reminder, please validate that the information is accurate and impactful.

Resources:

- ChatGPT prompt
    - Please adjust as necessary
- Video



Reference this engagement rubric to get a better understanding of how they should be conducted.

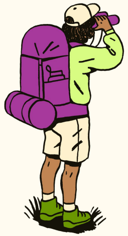
Success Plan Delivery is successful when you...

Connect goals to recs

You communicate a clear path from what they want to accomplish to how your recommendations help them achieve that.

Show quick TTV

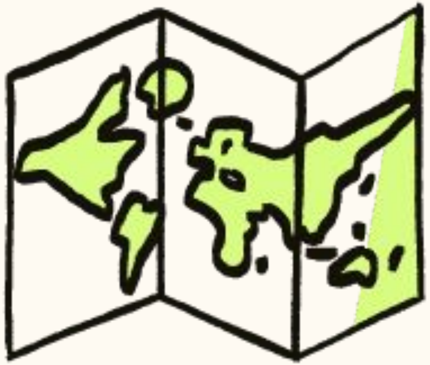
Ensure to include at least one quick win. Zendesk wins with our many OOTB features.



Meaningful Follow-up

Don’t leave them hanging – ensure they have the resources to grow and progress even after their engagement.

When customers need a little more...



Escalations

Sometimes customers need a little more than what we're able to provide. That's okay! There's a path for that.

Roadblock: More assistance is needed

Technical assistance:
Path: Escalate ticket through Advocacy or leverage SA for advanced technical assistance

Implementation assistance:
Path: Escalate to services sellers to find the adapted Professional Services package for the customer.

Roadblock: Customer frustrated beyond reason

Path: Partner with manager to determine next steps. If all other paths to resolution have been exhausted submit a ticket via the Gainsight Bot.

Roadblock: Customer does not see value in Zendesk

Path: Partner with manager to determine next steps. (Business Value Framework, Value Hypothesis, others,

Roadblock: Customer is looking at other competitors

Path: Review Competitive Resources and attack!

Gainsight Admin

GAINSIGHT

Gainsight Administrative Tasks

Gainsight is the Global Customer Success source of truth so it's important that the information here is accurate, detailed and up-to-date.

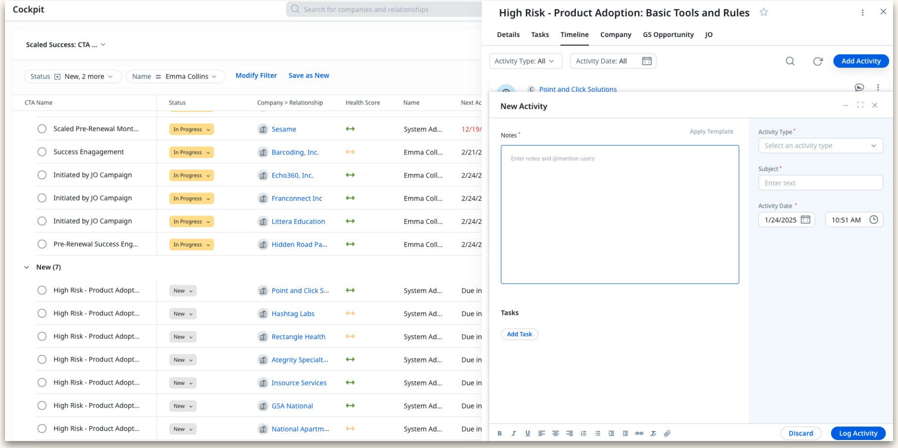
Review the chart to ensure that appropriate tasks are completed after key activities.

	What should I log in GS?			
What happened?	**General Update**	**Account Health Update**	**Scaled Meeting**	**CTA Update**
Conclusion of Outreach Sequence or Email		x		x
Meeting with Customer		x	x	x
Connected w/ AE or renewals and received material info		x		x
Connected w/ AE or renewals and received immaterial info	x			x
Notified of C/C		x		x

Update the Timeline from the Cockpit

Update the Timeline via the CTA. This is important for three key reasons:

1) This is a more centralized space to access the Timeline, Renewals Center, SFDC Link, and any Playbook Tasks.
2) Seek to eliminate the amount of overdue CTA’s and ideally create an environment where these are updated more regularly.
3) We’re able to gain more data on the effectiveness of the CTA’s we launch when Activities are logged inside of the CTA.
    a) This will allow us more insight on if we’re firing the *right* CTA’s and the ARR impact they have.



We’ll discuss exceptions later on in this section.

GAINSIGHT

TIMELINE

Logging a Meeting

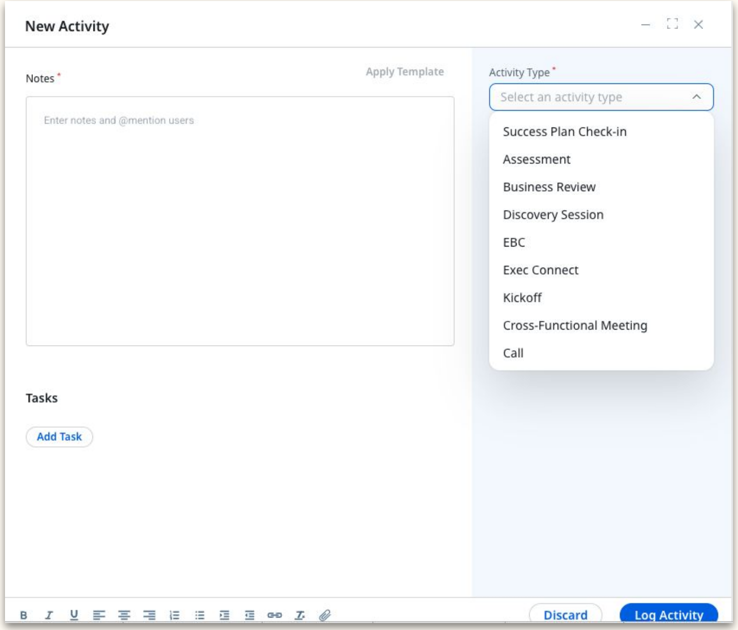
There are a variety of different Activity Types to choose from when logging a meeting. The two primary types you will choose when having a meeting with a customer are the following:

- **Success Plan Check-In**
  - Best used for the Recommendations portion of the customer engagement
- **Discovery Session**
  - Used for Discovery (generally the 1st call) of an engagement

There are a few others as well which you might use occasionally:

- Cross-Functional Meeting
- Product Specialist Engagement

The rest I would avoid at this time until further enablement is provided.



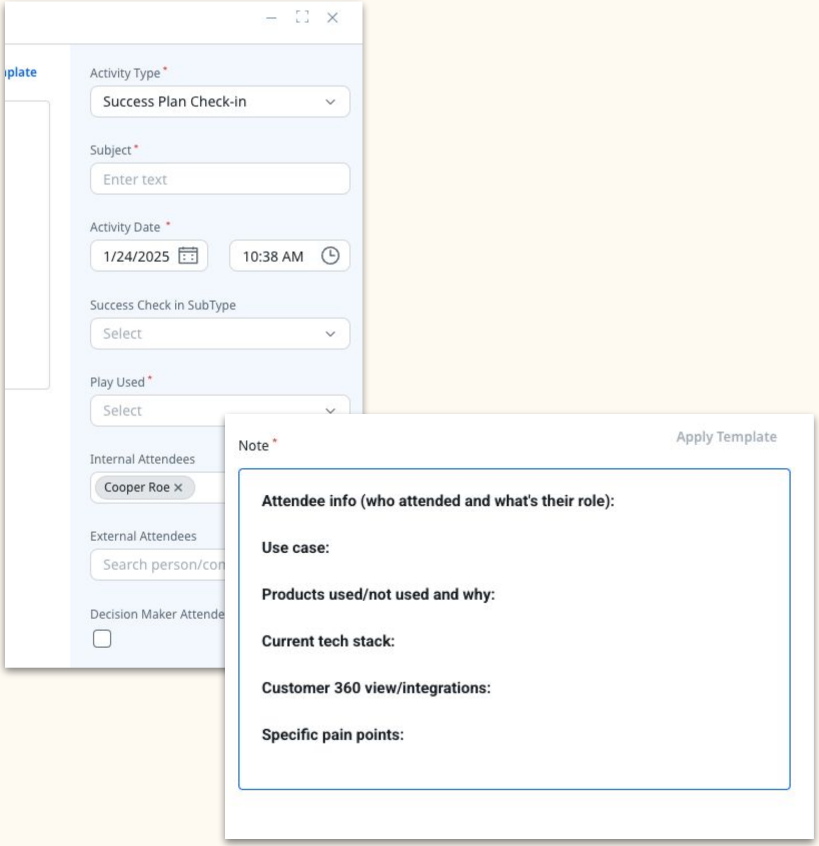
TIMELINE

Fields & Notes in the Timeline Activity

A variety of fields will appear on the right-hand side when you select an Activity Type. Any field marked with an asterisk (*) you'll be required to fill out. Additionally complete the following:

- Success Check-In SubType
- Internal & External Attendees
- Sentiment, CSAT Survey, and Survey Language
  - On the last call of the Engagement
- Document Link
  - If Success Plan was delivered on the call

There are Templates available for the Note portion of the Timeline Activity. You can use a ChatGPT script to also populate data in here as well.



GAINSIGHT

General Update

When:

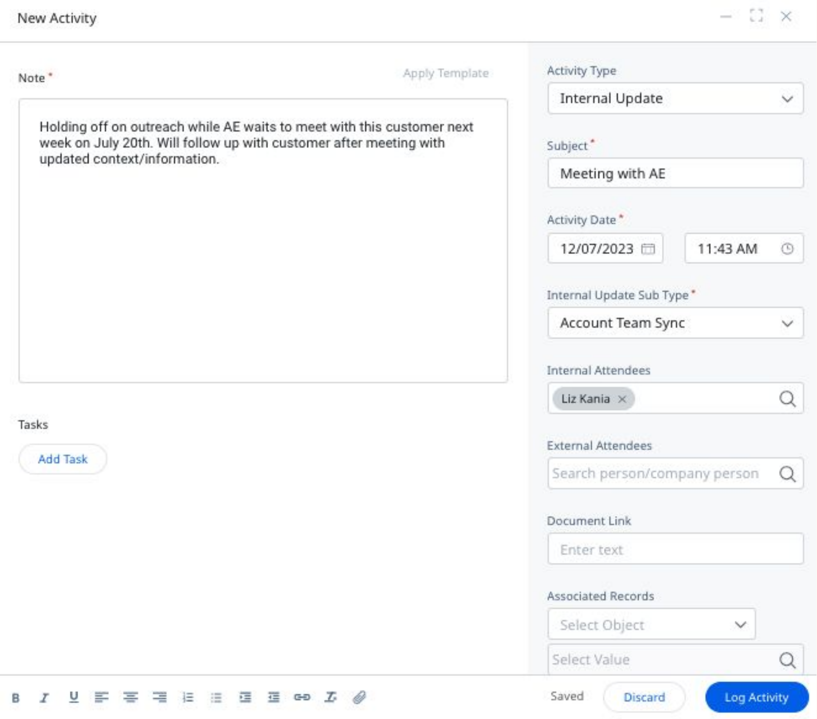
- Connected with AE or renewals and received immaterial information

Why:

- Keep an up to date record of conversations happening around the account

Examples:

- AE or Renewals is meeting with customer next week and we are waiting to determine health status after that meeting
- Customer is in the middle of a services engagement



CSM Owns Scorecard Updates

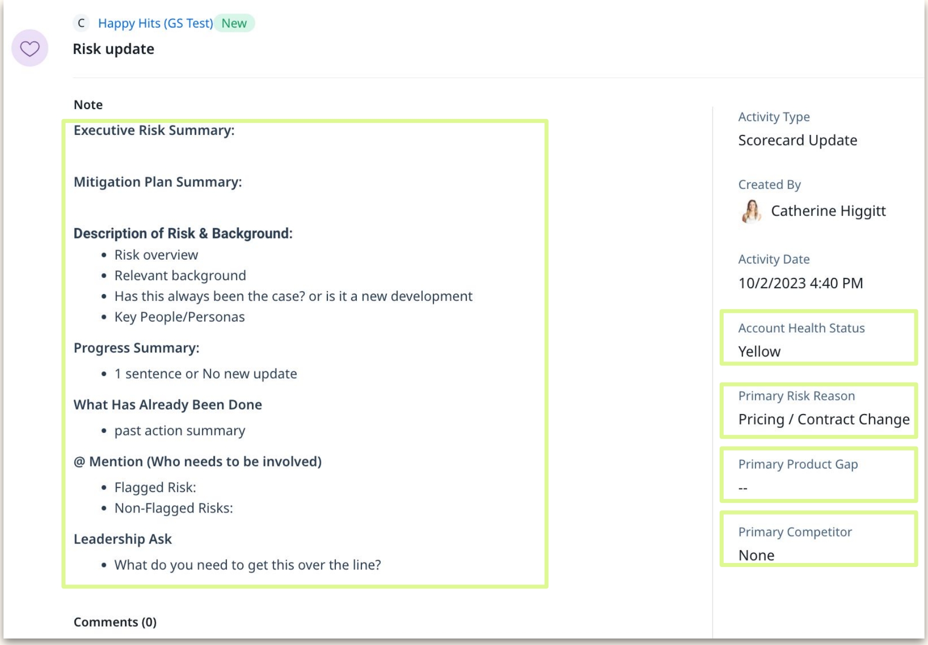
What is required on the Scorecard?

ACCOUNT HEALTH STATUS Your gauge of a customer's health with Zendesk. We use this status to understand where we need additional support.

PRIMARY RISK REASON Based on your knowledge of the customer, this drop down is used identify what is driving the risk

PRIMARY PRODUCT GAP Identifies what Zendesk products your customer is struggling with.

PRIMARY COMPETITOR Identifies what alternative solutions this customer may be looking at.



Inputting Scorecard Updates

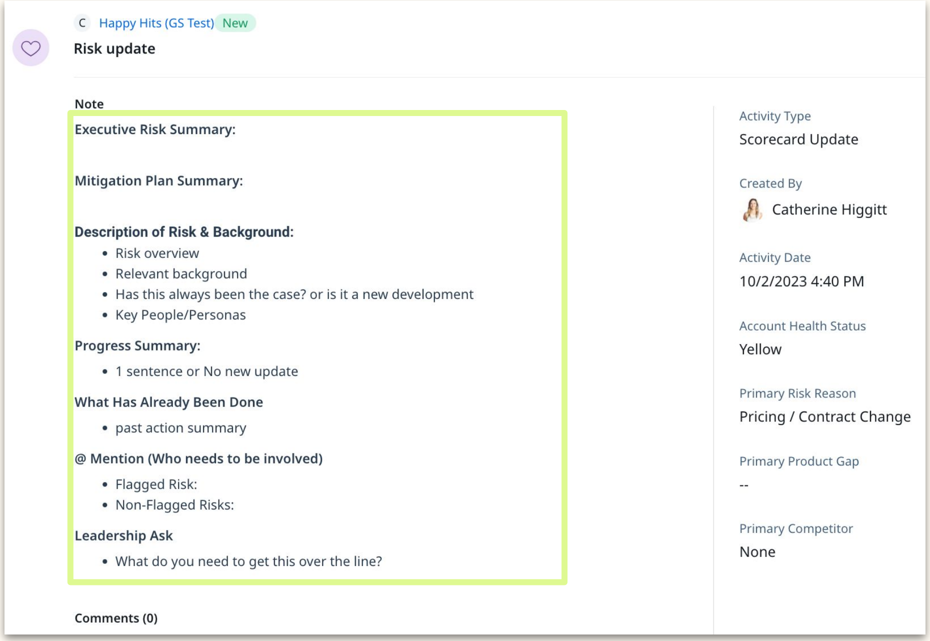
"Next Review Date" can be used if you know the next time you'll be providing a scorecard update

What's New on the Scorecard?

NOTES TEMPLATE A guide to the key information that needs to be provided when documenting customer risk via the Gainsight Scorecard.

EXECUTIVE RISK SUMMARY Concise, Executive-facing summary of the risk being faced by your customer

MITIGATION PLAN SUMMARY Your recommendation on how to move forward with the customer and resolve the risk



General Update

When:

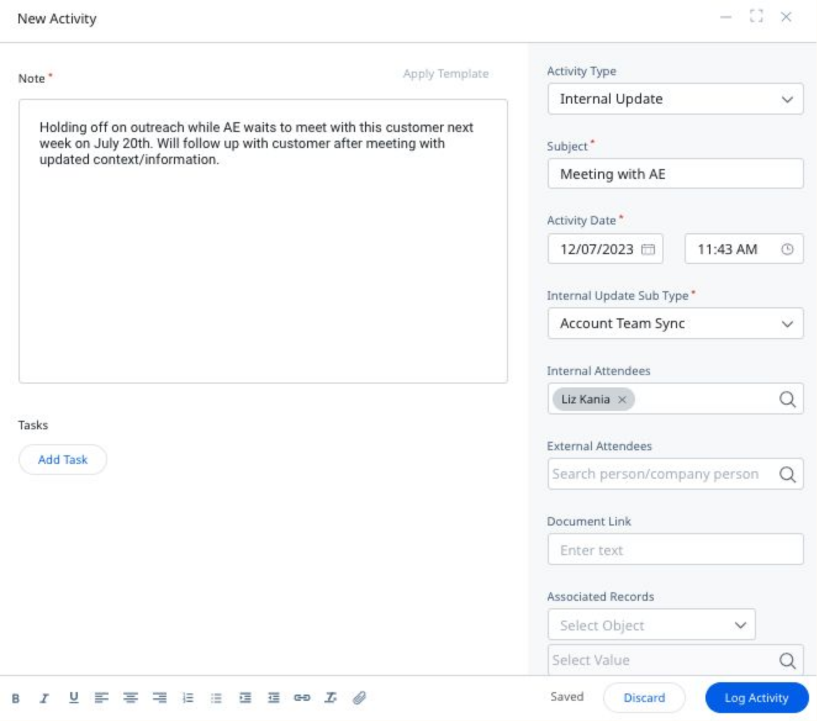
- Connected with AE or renewals and received immaterial information

Why:

- Keep an up to date record of conversations happening around the account

Examples:

- AE or Renewals is meeting with customer next week and we are waiting to determine health status after that meeting
- Customer is in the middle of a services engagement



CTA Update

When:
- Conclusion of outreach sequence
- Met with customer/completed an engagement
- Received material info from AE/Renewals (when connected with a CTA)
- Notified of c/c

Why:
- Keep a clean record of your engagement pipeline, ensure realistic reporting at the regional level for success rate of CTAs

Every CTA should result in a Forecast update in Renewals Center

Status	When to use
New	Default status when automated/trigger-based CTA is created
Planned	Outreach has begun, customer has been sequenced
In Progress	Activity has been committed, meeting is booked, two part engagement is in progress
Completed	Meetings have been held
Closed Lost	Unable to schedule, ghost customer, no show
Closed No Action	Recently engaged, CTA invalid, did not attempt outreach

CTA CREATION

Should I be creating CTA's for meetings that are from other sources?

Yes. We are able to distinguish on the back-end CTA's that were created by the system vs. those you've created on your own.

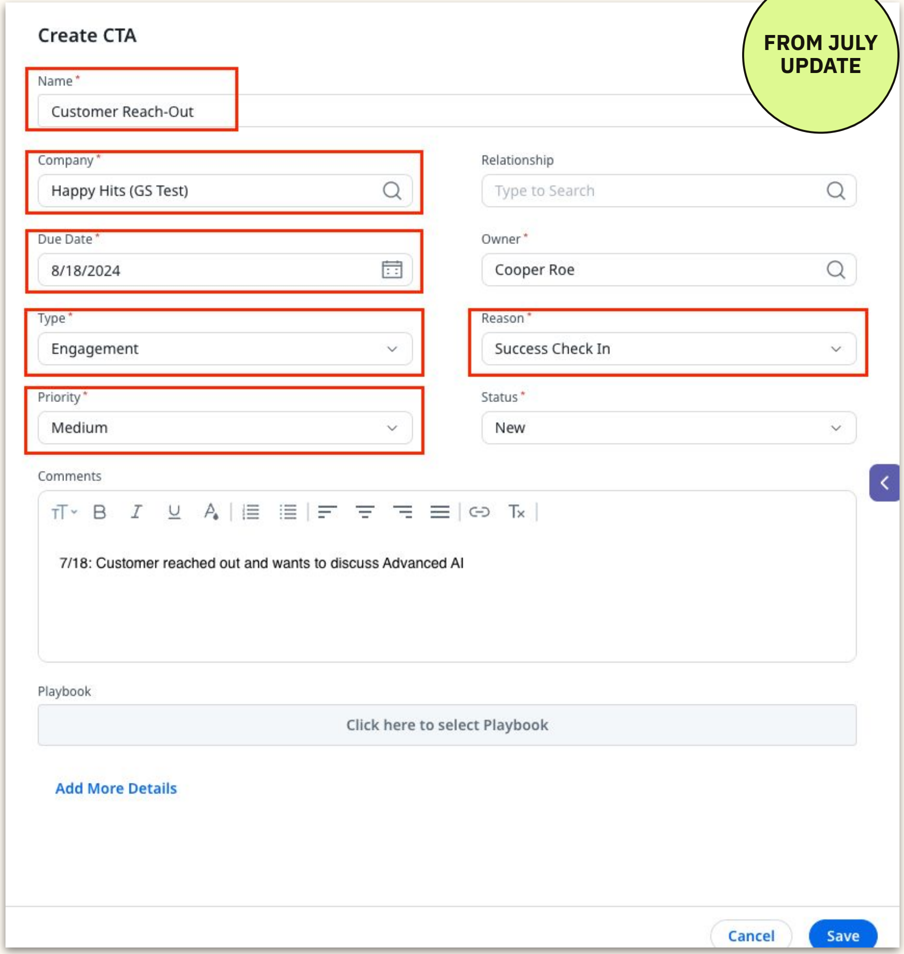
This data is important and will ultimately help with organization and ensuring calls & scorecard updates are logged in Gainsight.

Recommendation: Create a CTA for an engagement where a CTA doesn't exist. Ensure the following is followed:

- Company Name is accurate
- Due Date is in the future (~ 1 month)
- Type = Engagement
- Reason = Success Check-In
- Priority = Medium
- Add Comments for whatever best helps you with the CTA.

More enablement to come as CX Transformation concludes.

FROM JULY UPDATE



GAINSIGHT

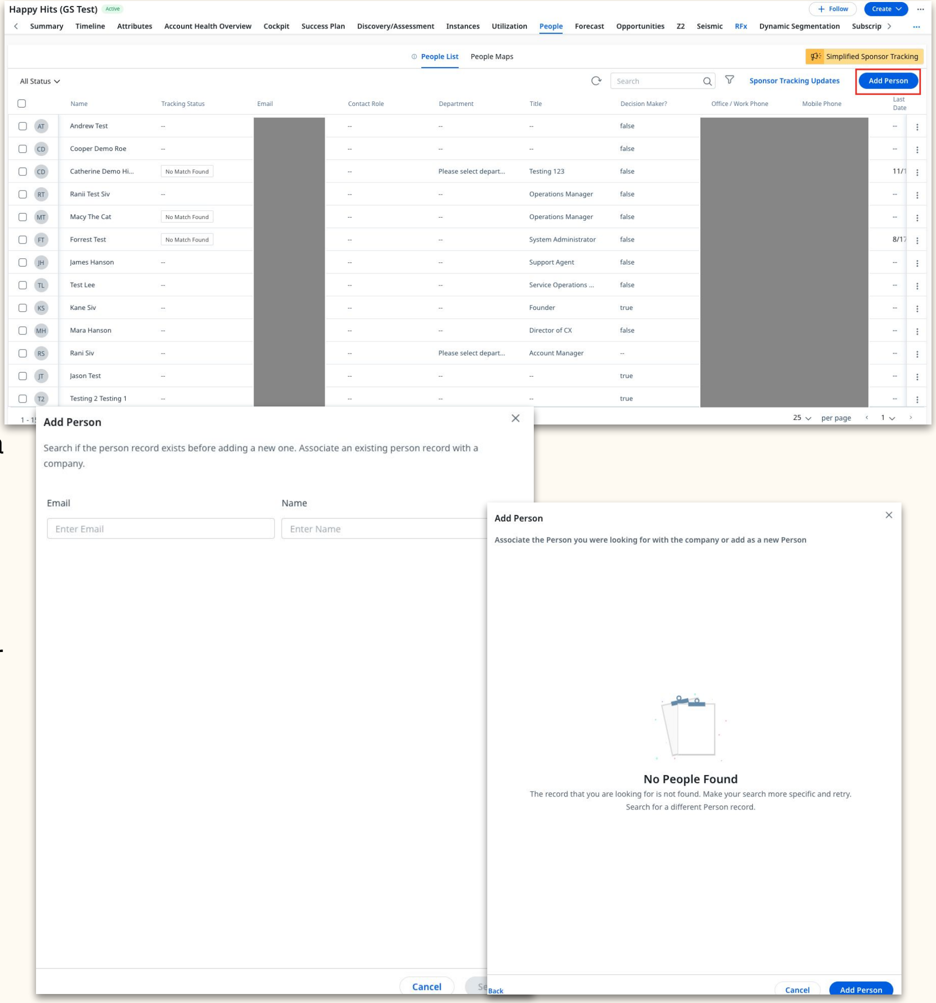
Gainsight

How to add a Person in Gainsight

If the individual you're trying to send an email to is not populating in Gainsight, that means they need to be added as a Person in the platform.

1) Go to the Account > People
2) Select Add Person
3) Gainsight will try and search for the Person first. Input their email to see if it matches
4) If no match, it will allow you to add them.
5) Inout the First Name, Last Name, and Email

Once this is done, you should be able to add that individual to emails and Timeline Entries



GAINSIGHT

GAINSIGHT GUIDANCE

Status for JO Automated CTAs

Journey Orchestrator Flow: Video Walkthrough

Watch Catherine's Video

CSM Steps

- Check Cockpit for new CTAs
    - **Planned =** Contacts will or have been added to JO Sequence
    - **New =** No Admins/Owners identified. CSM work through CTA like usual
- When customer schedules time, they are dropped from campaign (as well as any other contacts from company)
- **In Progress =** meeting scheduled
- **Completed =** meeting held
- **Closed Lost =** unable to schedule meeting or customer not interested at this time

Gainsight Admin

Account Health Update

When:

- Conclusion of outreach sequence
- Met with customer/completed an engagement
- Received material info from AE/Renewals
- Notified of c/c
- **Where there is any risk on accounts >60k ARR please @mention your manager in Gainsight and add to 1:1 doc to discuss save options**

Why:

- Create a clear picture of risk in BoB, input data to inform future outreach, impact overall BoB forecast

Examples:

- Customer **did not respond** to outreach sequence and has green c/c score - **set to yellow**
- Customer meeting went well, **customer sees value** and is looking to grow - **set to Green**
- AE let CSM know that **customer is considering SFDC** - **set to Red**
- Notified of c/c - **set to Churning if full churn, Red if contraction**

Required Info: Green accounts	Required Info: Red/Yellow accounts
Adoption of Zendesk Expansion opportunities with other products or plan shifts (if applicable) New relationships with key decision-makers. Highlight who the champion in the org is (with title) If a seasonal account, include any seasonality explanations for planned contractions.	Why is this account at risk If unresponsive, provide a summary of outreach efforts. When the last email exchange was, who you tried to connect and the type of Scaled engagement that was offered What product is at risk How much of the ARR (of the total) is at risk (if you know) When this ARR is expected to contract (if known). If not known, state this is unknown Summary of actions taken (this can be short/sweet) Next steps Help you need (if applicable)

Detailed Health Status Update guidelines can be found in Seismic Knowledge

Gainsight Admin

Account Health Status Guidelines

Account Health Status is used to define the overall health of the account, which is representative of the following:

- Relationship
- Adoption
- Engagement
- Confidence in Partnership
- Likelihood of Churn or Contraction

Green	Yellow	Red
No known risk of churn or contraction	***Some risk of churn or contraction***	***Major risk of churn or contraction***
Customer is actively engaged with Sales & Success	Customer is not actively engaged with Sales & Success	Customer is unresponsive to outreaches and not engaged
Relationships are established with decision makers	Relationship change that puts us at-risk and/or no relationships established with decision makers	Lack of relationship with leadership
Adoption and feature usage is good	Adoption & usage trending down or poor	Low adoption & usage
KPIs strong and/or showing growth and improvement	Support/product-related issues (sporadic outages, outstanding tickets, etc.)	KPIs low without improvement
No concerns with renewal	Risk of contraction is <50% of ARR	Business experiencing instability
		Support/product-related issues (numerous outages, high ticket volume, escalations)
		Risk of contraction is >50% of ARR

Churning

Set only once the customer has confirmed they will be churning (with expected churn date)

REPORTING

Dashboards inside of Gainsight

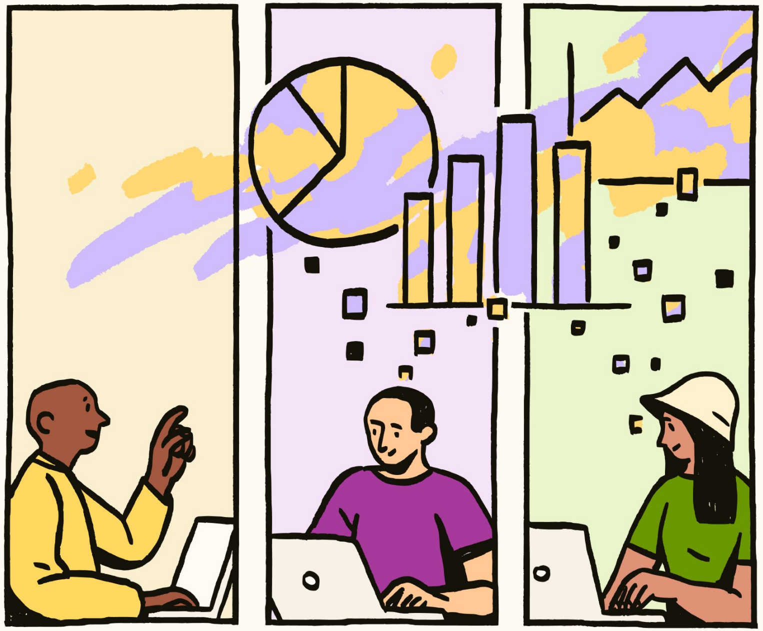
For Scaled Success, we have two primary dashboards we use as a team in order to gauge KPI performance and our Book of Business (BoB).

Scaled: Operating Metrics Dashboard

- Track your progress towards Quarterly/Yearly KPI targets
- Monitor your Gainsight CTA adherence

Scaled: Portfolio Dashboard

- Overall view of your Book of Business and Account Team
- Reports geared towards account health and discovery



1:Few and 1:Many Engagements

zendesk

Scaled Success Playbook

Understanding our 1:many motion

1:many program overview
1. Customer Success Live
2. Customer Success On Demand

Customer Success Live - Participation
1. Program Management and key Point of Contact
2. Program Roll Out Quarter on Quarter
3. What is expected of me as a CSM with the program
   a. Hosting an event
   b. Promoting the program to my customers
   c. Spreading the word internally

Customer Success on Demand - what you should know
1. Program Management and key points of contact
2. How to leverage the program

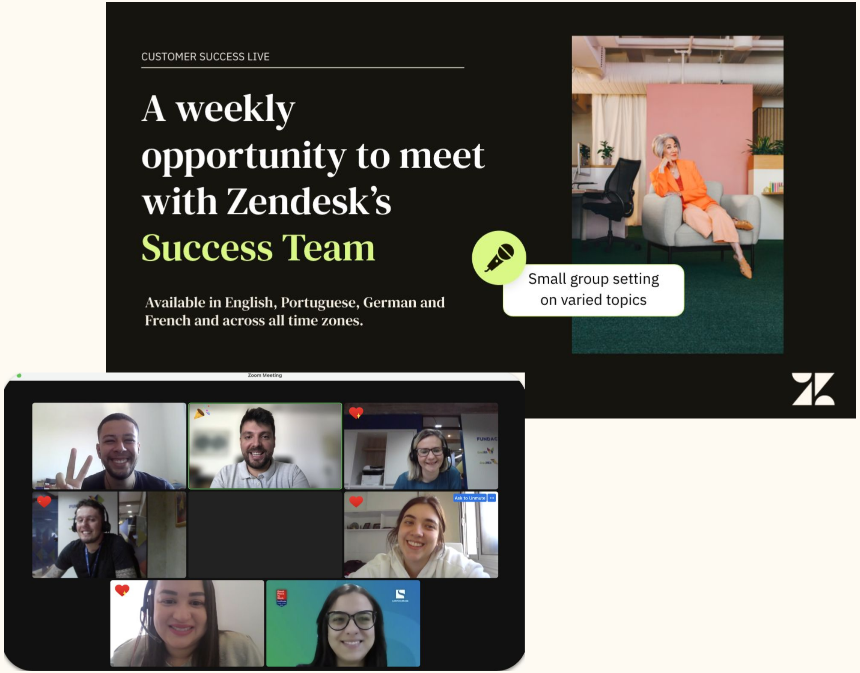
Success with Zendesk - what you should know
1. Program Management and key points of contact
2. How to leverage the program

PROGRAMS OVERVIEW

CUSTOMER SUCCESS LIVE

What is Customer Success Live?

- A **recurring** 1:many session for customers to meet with Success Managers in each region we cover and in their own languages
- Covering **hot topics** and recurring themes to help customers onboard, adopt and grow their product usage
- A chance for customers to **connect with fellow Zendesk users** in a small group setting
- **Run and hosted by the Scaled Customer Success Team**



CUSTOMER SUCCESS LIVE

Program Breakdown

CONTENT
Our program differs region to region to adjust to our resources and market needs but they all encompass one or several of the below categories:
- Onboarding session
- Questions and Answers
- Hot topics

AVAILABILITY
The program runs in all region globally and in different languages:
- AMER: English
- APAC: English
- EMEA: English, French, German
- LATAM: Portuguese and soon Spanish!

CADENCE
The cadence depends on the region and resources:
- AMER and EMEA English content: every week
- LATAM, APAC, French and German: every 2 weeks as of now

ATTENDANCE
Sessions vary in attendance.
Hot topic session usually are capped around 30 people.
Onboarding sessions are not capped.
Q&A sessions are capped to 20 people so everyone can get to ask a question.

Our program's content adjust and adapt to regional needs where possible so we stay close to our customer needs. English content is aligned with our Global content strategy and decided in cooperation with our Marketing and Community team

CS LIVE PARTICIPATION

WHO IS RUNNING CUSTOMER SUCCESS LIVE? **PROGRAM LEADS**

Ophélie Durand
Senior Manager
PROGRAM LEAD

EMEA		APAC	AMER		LATAM
					
Valérie Moysan	**Rebekka Fischer**	**Clara Vaudrion**	**Angi Butler**	**Shravanthi Narendran**	**Vitor Meira**
Portfolio CSM II	Portfolio CSM II	Portfolio CSM	Portfolio CSM	Portfolio CSM II	Portfolio CSM II
CS LIVE CHAMPION	**CS LIVE CHAMPION**	**CS LIVE CHAMPION**	**CS LIVE CHAMPION**	**CS LIVE CHAMPION**	**CS LIVE CHAMPION**

Our CS Live champions are responsible for:

- Curating and creating the content of our sessions (agreeing on topics, creating the slides and talk tracks)
- Managing our event platform (creating and managing events, supporting the teams on the platform)
- Promoting the events and helping the rest of our CSMs promote the events

WHO IS RUNNING CUSTOMER SUCCESS LIVE?

Customer Success Live is a team program and its success depends on the whole team!

- As a Portfolio Manager **you are expected to join our promotional effort** and make sure your customers are leveraging the program
- **Your voice matters!** Our CS Live champions regularly ask the teams what are the topics their customers are asking for
- The main goal of this program is to help you cover your books at scale - **leverage CS Live sessions** to cover one topic for several of your customers at the time! This will free some of your time to focus on more complex strategic conversation - this is meant to make us all more efficient at delivering value!

CUSTOMER SUCCESS LIVE PARTICIPATION

PROGRAM ROLL OUT QUARTER ON QUARTER

Each quarter, our CS Live champions in partnership with leadership, community and marketing decide upcoming topics for our sessions. Have a look at the timeline below to understand what to expect every quarter

Phase 1	Phase 2	Phase 3	Phase 4	Phase 5	Phase 6
Usually happening a month before next quarter		Ongoing all of current quarter with a push on promotion on day 1 of the new month			
Pre-quarter Topic Decision	**Planner update**	**Content creation**	**Promotion**	**Hosting event**	**Post event**
Topics suggestions collected from our team and our team partners (community + marketing) CS Live champions make final call on topics to cover following quarter	CS Live champions update the Global planner with new topics / date + deck owner CS Live champions to update their regional planner with dates and regional hosts for the session	CS Live champions to create new events on Bevy CS Live champions to create their assigned deck + add the link in the planner and folders	Once we know the upcoming events, it's time to spread the word! Leaders will send over some announcement to sales leaders CS Live champions will post on channels with sales people CSM are expected to inform their AEs and post in relevant channels too	**Each CSM is expected to host at least one or two events per quarter.** Being a host means getting familiar with the content ahead of the session and prepare oneself by checking in with local CS live champion.	CS Live host to record the session (for English content only one recording per topic based on deck ownership) Amanda + Stephen to add the recorded session to our vimeo channels* *Subject to change in 2024

Who's in charge of which phases?

CS Live Champions

Scaled CSMs

Scaled Leadership

AS A CSM WHAT IS EXPECTED OF ME WITH CS LIVE?

The next few slides will walk you through

- Hosting an event
- Promoting the program to my customers
- Spreading the word internally

HOSTING

Before hosting an event, you need to get host rights and become a host on our platform. How?

Step 1
Create your bevy account
Follow the steps here
Bevy is the platform we use to host all of our CS Live events.

Step 2
Join your regional chapter
Each event page holding all events is called a chapter - you can join it by clicking the join button at the top of it.

Step 3
Ask your CS live champion to give you lead chapter access.
Once you have host rights, you will be able to connect to the events on your chapter as a host.

You can find your regional CS Live event page below:
EMEA - event page
AMER - event page
LATAM (Portuguese) - event page
APAC - event page
French - event page
German - event page
Spanish - event page (on hold)

HOSTING AN EVENT: BEFORE THE EVENT

Getting Ready to host

Our CS Live champions do an amazing job in getting the content ready for the session. **They provide you with the slides** and all you have to do is:

- **Save time in your calendar to get familiar with the content** 1 or 2 days ahead of the session - make sure you ask questions to your CS Live champion to ensure you are fully able to present the slides
- All host have a co-host, **make sure you sync** with them ahead of your session to agree on how you want to lead the content
- **Block the time** of the session you will present in your calendar to make sure you can make the session - after you RSVP for the event don't forget to add it to your calendar.

How do I know which session I am presenting?
Before each quarter your CS Live champion will share the Global Planner updated so you can put your names down as a host for the session of your choice.
The expectation being that you host at least 1 to 2 session a quarter. Once you know which even you will host, **you need to RSVP for it on the event page.**

HOSTING

All you need to know on the day you are hosting

It’s D-day, you have followed all of the previous steps, you RSVPed prior to the event and now it’s time to join your session. Best practice is to meet with your co-host a few minutes before the event starts. You can join the event by either clicking on the link in your calendar placeholder or by visiting the event page and hitting the join button. (It will appear 15 mins before the event).

Once in the event, follow this checklist:

- ❏ *Disconnect from the VPN when presenting/screen sharing.*
- ❏ *Before the session starts be sure to run a Pre Call test to make sure your audio and video is running properly so we have good connectivity and hardware.*
- ❏ ***Close all additional tabs and windows and have only the Bevy tab and the Deck present in your browser.***
- ❏ *Turn off all your notifications so you’re not disturbed while presenting*

Steps are here for further troubleshooting.

All you need to know on the day you are hosting

When the event start, follow this checklist:

- ❏ Remove all presentation access from registrants during the presentation/screen share as this will improve performance. You can do this by clicking on their profile and toggling access to OFF. **By default this should be automatically done but always good to quickly double check.**
- ❏ Have a little ice breaker ready: “pop in the chat where you are connecting from? Pop in the chat your favourite ice cream flavour, etc”
- ❏ Let customers know that you will be starting to record (if you are recording) **but you’ll end the recording before the Q&A starts and no-one will be recorded.**
- ❏ When presenting the second presenter can monitor the chat for any questions or comments and also to make sure the screenshare is working properly.
- ❏ Once you’re finished the recording and slides you can open the floor to questions and ask if anyone wants to come on camera/audio and ask the question aloud

Pro tip : You can say that you had a very basic question in a DM or Email and answer it aloud as to encourage everyone to start discussing :)

All you need to know on the day you are hosting

When the event is over:

- ❑ Always good to do a quick double check to see if there are any additional questions or comments in the chat.
- ❑ Encourage customers to come back by mentioning any future sessions and linking the chapter page in the chat.
- ❑ Select "***End Event for All***"
- ❑ Navigate to the Wrap Up section and add in any relevant recordings from Vimeo (which would have been uploaded previously) before selecting Save.

How do I find my recording?
When your event is over, you can head to the admin dashboard > event tab > completed event > click on the event you just hosted. Once in the event, click on the wrap-up tab, scroll down and you will see recording. You can then download your recording and forward it to either Stephen O'Leary or Amanda Kurth. They will then upload on our vimeo page and share the link with you for you to add on the wrap up page.

Cross Functional Partners:

How we collaborate

zendesk

Collaborating across teams for the best Customer Experience

Renewals	Responsible for commercial Renewal conversations and in quarter forecasting Loop Renewals in via Z2 whenever a customer mentions adjusting their contract at renewal, churning or contracting
Sales	Responsible for overall account management with a focus on expansion and new business Work to build relationships with AEs that you share the most accounts with through regular 1:1s and joining their team meetings
Advocacy	General support issues, technical escalations, responding to customer tickets Use this guide to understand when and how to escalate an advocacy ticket in Z2
Services	Provide paid services to customers who need extra support implementing Zendesk, reconfiguring, launching new workflows, building integrations etc Refer to this hub to understand how Services can help your customers

Career Progression

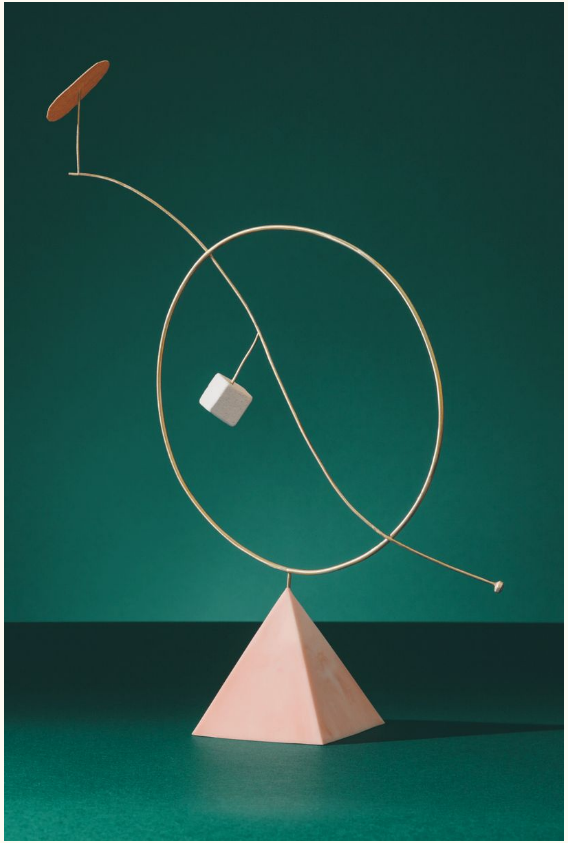
Guidance for your growth at Zendesk

zendesk

2025

Scaled CS: Career Ladder/Lattice

zendesk



How can you own your career progression

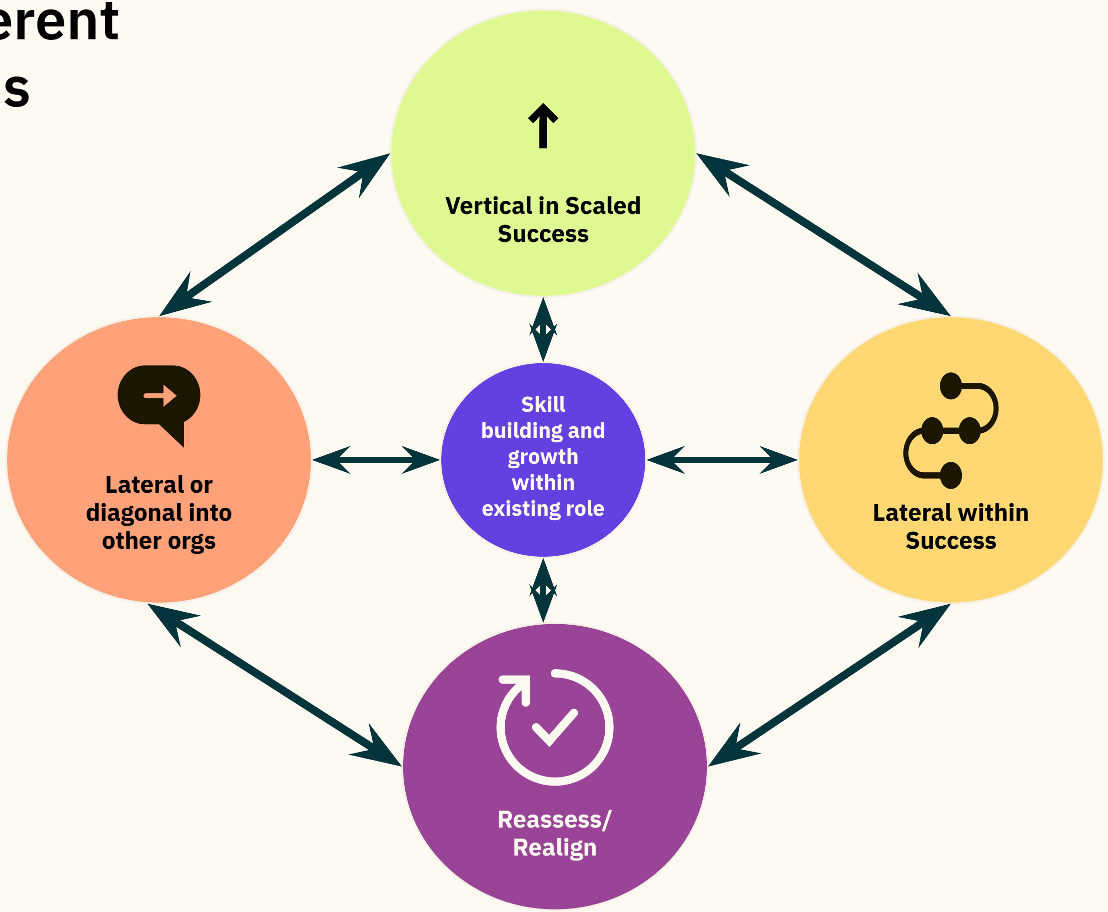
Leadership is here to help you succeed, but YOU truly own your career path

1. **Be introspective.** Identify what you enjoy about your current job, what you want to do more of and what interests you. Find your motivation and fulfillment.
2. Determine roles/teams that fit those interest areas and **start networking,** whether the next step is on the Scaled team or on another team. Ask your manager to make an intro if they have the connection already.
3. **TELL everyone** (your peers, leaders, cross-functional partners and their leaders) what you want to do next, when people have you in mind they will insert you into opportunities to get you there!
4. Work with your manager and others to build an assessment of the skills and relationships needed to get to the next step, have a **clear, actionable plan to achieve those goals and hold yourself accountable to taking those actions**
5. **Fully leverage the Career Essentials Toolkit**

Some general advancement criteria: what is needed before taking that next step?

1. At least **one year in your current role.**
2. **Exceeding expectations.** Engagements quantity and quality, customer delight, a trusted resource. **Raise the bar.**
3. A business need, ability, or justification. **Promotions aren't automatic,** but they're influenced by performance and impact**.**
4. **Good standing in the business**, within the org and across the team.

Explore Different Growth Paths



Defining Critical Skills..

Associate Portfolio Success Manager	Portfolio Success Manager I	Portfolio Success Manager II	Senior Customer Success Manager
Level: **SP11**	Level: **SP10**	Level: **SP9**	Level: **SP8**
Scope: Manages own book of business (Onboarding?)	**Scope:** Manages a more strategic book of business/more complex clients	**Scope:** Manages a strategic book of business and serves as a mentor/coach to other team members	**Scope:** Manages most complex clients and serves as a thought-leader in Scaled Success
Profile: Early career employee	**Profile**: Experienced Scaled Success professional	**Profile**: Seasoned/Senior Success professional	**Profile**: A true expert

Scaled Success Career Progression

Title	Associate Portfolio Success Manager	Portfolio Success Manager I
Level	**SP-11**	**SP-10**
Expectations	**Success Plans:** Minimum of 30 per quarter **CSAT**: Keep average above 4.3 **Call Quality***: Maintain average of 4 or higher **1:many:** 1:many Delivery on rotation B**ook of Business:** Cover accounts in the 25 - 40k ARR range	**Success Plans:** Minimum of 30 per quarter **CSAT**: Keep average above 4.3 **Call Quality***: Maintain average of 4 or higher **1:many:** Active participant in the creation and delivery of 1:many content B**ook of Business:** Cover 40k+ ARR accounts
Responsibilities	**Product:** Develop foundational product knowledge through participation in training, shadowing calls, and completing initial certifications; Stay up to date with product enhancements and best practices; Put into practice through the delivery of relevant and actionable recommendations **CTAs**: Action Gainsight CTAs using recommended tools and follow through the next steps **Risk and Value**: Learn to identify early risk indicators and escalate appropriately; Deliver value by mapping product solutions to customer pain points and tactical goals. **Gainsight**: Maintain Gainsight notes and health status updates, ensuring they are clear, complete, accurate, up to date, and aligned with team standards. **Customer First:** Ensure all interactions are customer-centric, providing a positive experience while building foundational skills in customer engagement.	**Product:** Demonstrate product knowledge on customer calls and through certifications, keep up to date on product knowledge **CTAs**: Action Gainsight CTAs using recommended tools (Outreach, Journey Orchestrator) and complete required follow up **Risk and Value**: Mitigate and escalate risk, ensure customers see value by mapping product solutions back to tactical and strategic goals **Gainsight**: Ensure Gainsight notes, forecast and health status are up to date on a weekly basis, are comprehensive and include all information required to give the fill picture of the account status and next steps **1:Many:** Participate in the delivery and promotion of 1:many programs and campaigns **Customer First:** Ensure that you are providing your customers with a positive experience by always operating with a customer first mindset

*Managers will review 6 calls per quarter with this call Rubric

Scaled Success Career Progression

Title	Portfolio Success Manager I	Portfolio Success Manager II
Level	**SP-10**	**SP-9**
Expectations	**Success Plans:** Minimum of 30 per quarter **CSAT**: Keep average above 4.3 **Call Quality***: Maintain average of 4 or higher **1:many:** Active participant in the creation and delivery of 1:many content	**Success Plans**: 30 per quarter with 20% of time spent on projects **CSAT**: Keep average above 4.3 **Call Quality*:** Maintain average of 4.3 or higher **1:many:** Active participation and leadership in creation and delivery of 1:many programs
Responsibilities	**Product:** Demonstrate product knowledge on customer calls and through certifications, keep up to date on product knowledge **CTAs**: Action Gainsight CTAs using recommended tools (Outreach, Journey Orchestrator) and complete required follow up **Risk and Value**: Mitigate and escalate risk, ensure customers see value by mapping product solutions back to tactical and strategic goals **Gainsight**: Ensure Gainsight notes, forecast and health status are up to date on a weekly basis, are comprehensive and include all information required to give the fill picture of the account status and next steps **1:Many:** Participate in the delivery and promotion of 1:many programs and campaigns **Customer First:** Ensure that you are providing your customers with a positive experience by always operating with a customer first mindset	***All PSM II Responsibilities are something that a PSMI can begin working toward while in role. Work with your manager during Career Conversations for guidance on focus areas*** **In Addition to Responsibilities of PSM I**: **Product**: Additional technical expertise and knowledge through continued education and product certifications **CTAs**: Identify opportunities for automation within CTA workflow **Risk and Value**: Identify risk trends in BoB and propose mitigation strategies, consistently bridge the gap between Zendesk functionality and strategic business goals for customers **Gainsight:** Ensure Gainsight notes, forecast and health status are up to date, set the standard and be a leading example of adding high quality, comprehensive Gainsight notes **1:Many**: Participate in the creation, delivery and promotion of 1:many programs and campaigns **Project Management:** Spend 20% of bandwidth contributing to critical projects assigned by leadership, identify opportunities for needle moving projects **Customer First:** Identify process gaps and improvements to ensure Customer First experience and mindset

Scaled Success Career Progression

Title	Portfolio Success Manager II	Senior CSM
Level	**SP-9**	**SP-8**
Expectations	**Success Plans**: 30 per quarter with 20% of time spent on projects **CSAT**: Keep average above 4.3 **Call Quality*:** Maintain average of 4.3 or higher **1:many:** Active participation and leadership in creation and delivery of 1:many programs	**Exceed expectations** in all aspects of Portfolio Success Manager II Role Expectations will vary based on specialization. Examples/possibilities include: ● Technical/advanced use case product specialist ● 1:many/Program specialist ● Data and Operations ● Risk management specialist
Responsibilities	**In Addition to Responsibilities of PSM I**: **Product**: Additional technical expertise and knowledge through continued education and product certifications **CTAs**: Identify opportunities for automation within CTA workflow **Risk and Value**: Identify risk trends in BoB and propose mitigation strategies, consistently bridge the gap between Zendesk functionality and strategic business goals for customers **Gainsight:** Ensure Gainsight notes, forecast and health status are up to date, set the standard and be a leading example of adding high quality, comprehensive Gainsight notes **1:Many**: Participate in the creation, delivery and promotion of 1:many programs and campaigns **Project Management:** Spend 20% of bandwidth contributing to critical projects assigned by leadership, identify opportunities for needle moving projects **Customer First:** Identify process gaps and improvements to ensure Customer First experience and mindset	***All Senior CSM Responsibilities are something that a Portfolio Success Manager II can begin working toward while in role. Work with your manager during Career Conversations for guidance on focus areas*** Demonstrate **deep knowledge of area of specialization** and focus on Scaled projects within that area that impact team processes and our customers **Identify areas for improvement within the Scaled** org and work with leadership to fold those ideas into existing priority projects or create and lead a new priority project **Demonstrate business impact** of your project/focus areas using data Pioneer new ways to help customers achieve desired outcomes and demonstrate impact Be a **go-to peer leader** for the team in both customer facing, team culture and process focused areas Senior Portfolio CSM role openings are not automatic promotion and **require justification and a business need** along with exemplary CSM performance and specialized skillset

Movement into High/Mid Touch Success

Title	Portfolio Success Manager II	Customer Success Manager
Level	**SP-9**	**SP-9**
Expectations	**Success Plans**: 30 per quarter with 20% of time spent on projects **CSAT**: Keep average above 4.3 **Call Quality*:** Maintain average of 4.3 or higher **1:many:** Active participation and leadership in creation and delivery of 1:many programs	**Commercial understanding** of managing a book of business **against renewal dates/timelines**, and delivering value based engagements. Successfully **manage a book of business t**o mitigate risk, strong product adoption, and prove the value/ROI of the Zendesk solution. With at-risk customers, ability to **create a "Get Healthy" plan** and execute to completion Accurately **forecasting churn/contraction** within BOB and identify expansion opportunities.
Responsibilities	**In Addition to Responsibilities of PSM I:**: **Product**: Additional technical expertise and knowledge through continued education and product certifications **CTAs**: Identify opportunities for automation within CTA workflow **Risk and Value**: Identify risk trends in BoB, consistently bridge the gap between Zendesk functionality and strategic business goals for customers **Gainsight:** Ensure Gainsight notes, forecast and health status are up to date (weekly?) **1:Many**: Lead the creation of 1:many programs and campaigns **Project Management:** Spend 20% of bandwidth managing critical projects assigned by leadership, identify opportunities for needle moving projects **Customer First:** Identify process gaps and improvements to ensure Customer First experience and mindset	Actively **manage a book of business (BoB)** to minimize churn and contraction and drive expansion by providing technical and business value **Partner with renewals and sales team** to understand where at-risk customers exist and formulate a plan to **mitigate churn/contraction,** as well as **drive expansion** Where appropriate to the customers' strategy, position and **qualify expansion** opportunities (software and services) with a warm handoff to Sales to progress and close the opportunity. **Conduct virtual and onsite meetings** according to Customer Success methodology to **get results, product adoption and ensure retention** Maintain a high level of integrity, empathy, and eye for business across multiple customers at one time, **connecting trends and themes into Product feedback a**nd Voice of the Customer (VoC) Simultaneously **prioritize for the best customer experience** and while also staying keenly **aware of the customer's overall health** and likelihood to renew Proactively **partner with customers** along the lifecycle to share recommendations **aligned to short term goals and long terms goals** through Success Plans, Configuration

Growing into teams outside of Customer Success

The world is your oyster, **these are just a few examples.** The key is to **meet people and leaders on the team r**egularly, understand what you can bring to the role and **what you need to learn** and **build those things into your development plan**

Success Practice

Sales/Renewals

Data/Operations

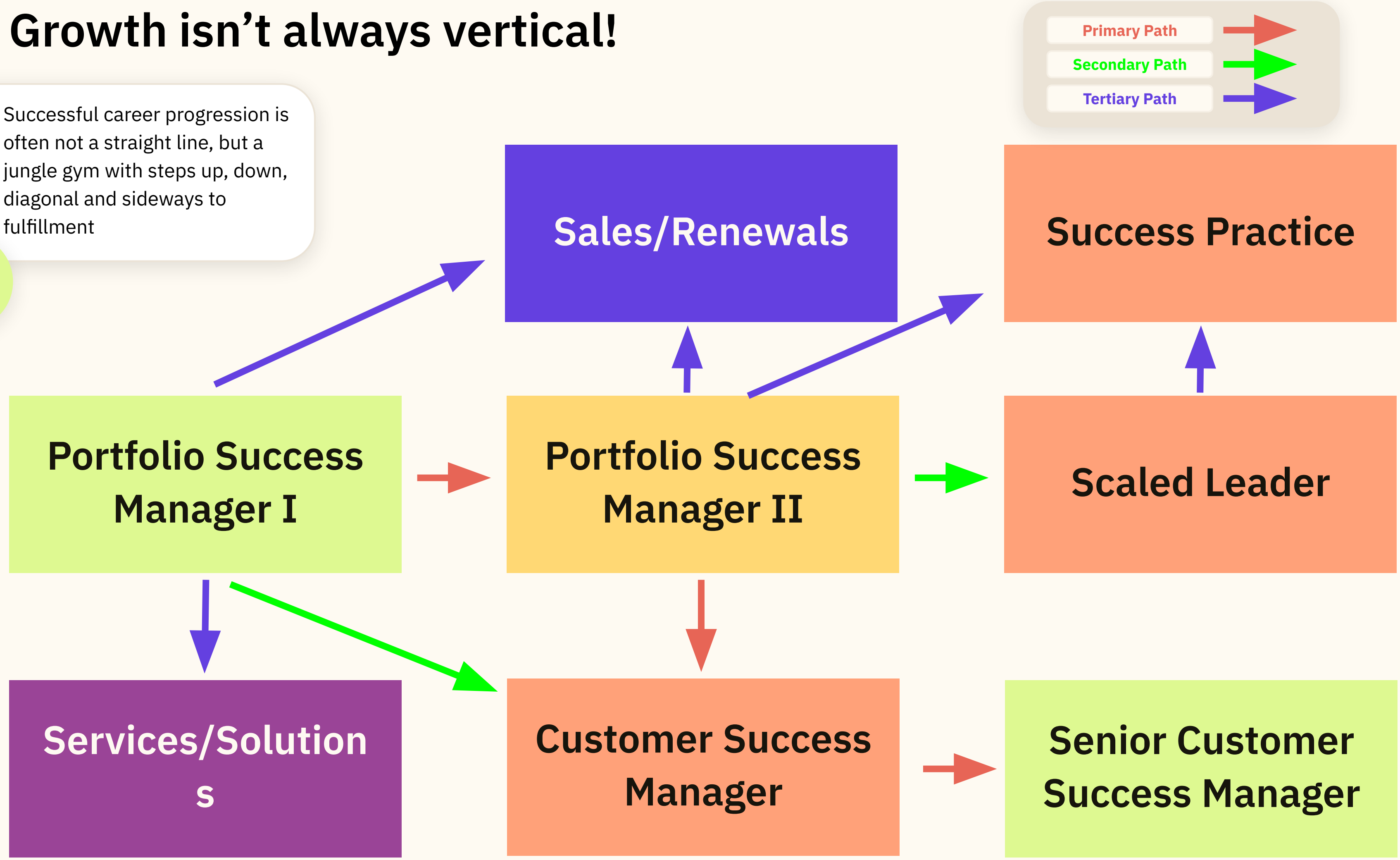
Enablement

Services

Solutions

Growth isn’t always vertical!

Successful career progression is often not a straight line, but a jungle gym with steps up, down, diagonal and sideways to fulfillment



Appendix

Additional Resources

Success on Demand - YouTube

Success on Demand - Help Center

Success with Zendesk - Community

Scaled Success Engagement Form

Email Template - Ghost Follow Up Emails

Option 1
Hi [Customer Name],

I hope this email finds you well.

I recently reached out regarding our Success partnership here at Zendesk, and wanted to follow up to see if you have had a chance to think about when might suit you best for an intro call?

Kind regards,
[CSM Name]

Option 2
Hello [Customer Name],

I hope this email finds you well.

I wanted to reach out again to understand when would suit you best to have a conversation with me about how you and [Company Name] can benefit from our Success Program. As a reminder, my job is to help you get the most value out of Zendesk by making recommendations on your current usage and product adoption.

If this is a busy time for you, there is no problem pushing this out to a more suitable time.

Let me know what works best for you, looking forward to hearing from you!

All the best,
[CSM Name]

Option 3
Hello [Customer Name],

I hope this email finds you well.

I took the liberty of checking in on your account stats with us, and I noticed that [find a hook from Tableau]. Is this an area you would like to improve?

As previously mentioned, my role is to help you get the most value out of your partnership with us, so please don't hesitate to reach out if you would like to set up some time to discuss the above.

All the best,
[CSM Name]

Email Template - Post Engagement Follow Ups

Option 1
Hi [Customer Name],

Thank you for the recent Success engagement we had together. It was truly a pleasure working with you and your team, and learning how our partnership can ensure your success.

I wanted to highlight a few key areas of focus we discussed during our call:

[List the key areas of focus]

Attached to this email I've included a Success Plan that outlines my recommendations for how to achieve those goals. Please review and let me know if you have any questions.

[Additionally, here are the other follow up items I promised.]

Your commitment to the Success Plan and active participation are vital to your success. Once again, thank you for your trust and collaboration. Your success is my priority and I look forward to witnessing your continued achievements.

Kind regards,
[CSM Name]

Option 2
Hi [Customer Name],

I appreciate you meeting with me today. It was a pleasure to learn more about how we can partner to ensure your growth and success.

During our conversation we discussed the following goals for you and your team:

[List the goals]

Attached to this email I've included a Success Plan that outlines my recommendations for how to achieve those goals. Please review and let me know if you have any questions.

[Additionally, here are the other follow up items I promised.]

I am happy to answer any questions that you may have about the Success Plan. Again, it was a pleasure connecting with you today.

Peace out,
[CSM Name]