Proactive CS

① Onboarding

Proactive Activities

- Risk Framework Established
- Customer Success Plan Defined
- Customer Health Score Established
- Dashboards Setup
- Customer Objective Reviews Established
- Monitoring Customer Business/Industry
- Customer Segment Established
- CS Engagement Blueprint
- Define CS Role for the Customer
- Communication Established
- Establish Champions

② Adoption

Proactive Activities

- Monitoring Customer Dashboard
- Risk Playbooks
- Voice of the Customer
- Create a Renewals Framework

③ Retention

Proactive Activities

- Customer Success Plan Update
- Customer Health Score Monitoring
- Customer Objective Review (COR)
- Personal Dashboards updated/monitored
- Unlocking NEW Value
- Create Renewals Confidence Segments
- Craft appropriate playbook
- Update Renewals Framework

④ Expansion

Proactive Activities

- Customer Objective Review
- Outcome-based selling canvas
- Customer Education (what matters to them)
- Monitoring Customer Business/Industry
- Strategize a team-based approach
- Use Dashboards & Analytics

⑤ Advocacy

Proactive Activities

- Customer Health Scoring
  - Product Usage
  - Outcomes Achieved
  - Relationship Strength
  - Support Tickets
- Risk Framework
  - Adoption Risks
  - Fit Risks
  - Product Experience
  - Feature Ideas
- Value Assessments
- Testimonials, Case Studies, Reviews
- Customer Referrals
- Focused Events
- Advocacy Programs (Advisory Boards, Champion Programs)
- Customer Advocacy Canvas - filled out and monitored
- Advocacy Assessment Planning Sheet

⑥ Strategic Advisor

Proactive Activities

- Knowledge
  - Customer Industry Monitoring
  - Customer News & Product Monitoring
- Skills
  - Prioritizing Your Own Time
  - Understanding people and what they want
  - Building personal dashboards
- Experience
  - Being prescriptive (solutions-based)
  - Protecting your customers
  - Owning the success plan

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