

CultureIQ - Customer Engagement Design



December, 1019

Stage	Sales to Solutions	Implementation	Adoption/Action Plan	Optimization & Expansion	Renewal
Customer Outcomes	<ul style="list-style-type: none"> Identify Desired Outcomes Develop Scope Seamless transition to Culture Solutions Establish trust with Culture Solutions team Alignment on partnership and expectations Signed Agreement 	<ul style="list-style-type: none"> Define Success Plan and timeline Understand the team and leadership structure Target Culture Identified Executive Sponsor bought in Target Culture Workshop completed Customer educated on corp. culture change levers Operationalized Customer 	<ul style="list-style-type: none"> Updated Success Plan with Customer Customer End Users are all using platform/services Customer implementing action plan Strategist established credibility with Executives Customer self-servicing in the platform and asking about further use cases. 	<ul style="list-style-type: none"> Updated Success Plan with Customer Customer adhering to best practices provided by CSM Opportunities for additional value for customer identified and converted into expanded services/modules Client serves as a reference for clients and participates in marketing activities. 	<ul style="list-style-type: none"> Value of Partnership understood and client wants a multi-year contract Alignment on Commercial and Service agreements
Sentiment	<p>Skepticism / weary of value prop Difficult to get buy-in from buyer group</p>	<p>Worried about organizational change project is bigger than anticipated. How will [company] support me through this change? Short-term disruptions in productivity Concerned about end-user adoption / training effectiveness</p>	<p>Concerns about measuring solution value? Light at the end of the tunnel. Concerned about transitioning to Support and Success</p>	<p>Difficult to communicate vision and iterative value being provided (business ROI)? Sometimes I feel like I'm talking with multiple companies. Support doesn't know me</p>	<p>How to get additional value out of the solution and justify spend to finance team.</p>
Milestones	Review Proposal Opp Reaches 80% Welcome Call	Kickoff Call Project Establishment First Value: Culture Expl. Survey Target Culture Workshop	Executive Business Review Action Plan Review & Implementation	Executive Business Review	Email Campaign Opp Reaches 80% Renewal Meeting Welcome Call/Email
Activities	<div>Develop Proposal</div> <div>Review Proposal</div> <div>Resource Assignment</div> <div>Complete and Transfer MEDDIC</div> <div>Internal Sales to Solutions Meeting</div> <div>Build Welcome Deck</div> <div>Welcome CII</div> <div>Send Welcome Kit</div>	<div>Build Kickoff Deck</div> <div>Kickoff Call</div> <div>Build Project-Specific Schedule</div> <div>Admin Training</div> <div>Perform Culture Expl. Survey</div> <div>Prep TCW Deck</div> <div>Target Culture Workshop</div> <div>Develop Success Plan</div>	<div>Monthly Status Call</div> <div>Exec Business Review</div> <div>Update Success Plan</div> <div>Implement Action Plan</div> <div>CIQ Guided Pulse Surveys</div>	<div>Optimization Opp Identification</div> <div>Platform & Strategist Optimization</div> <div>Exec Business Reviews</div> <div>Self Guided Pulse Surveys</div>	<div>Auto. Renewal Notification Campaign Kickoff</div> <div>External Renewal Meeting</div> <div>Develop Proposal</div> <div>Internal Proposal Review</div> <div>Send Proposal</div> <div>Welcome (Renewal) Call/Email</div> <div>Update Success Plan</div>
Deliverables	<div>Proposal</div> <div>Signed Agreement</div> <div>Welcome Deck</div> <div>Welcome Kit</div>	<div>Kickoff Deck</div> <div>Project Schedule</div> <div>Target Culture Workshop Deck</div> <div>Success Plan</div>	<div>EBR Deck</div> <div>Success Plan</div>	<div>EBR Deck</div>	<div>External Renewal Meeting Deck</div> <div>Proposal</div> <div>Signed Agreement</div> <div>Welcome Call Deck/Email</div> <div>Success Plan</div>