

DESIGNING, DEPLOYING AND OPERATIONALIZING CUSTOMER SUCCESS PLAYBOOKS

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VP of Customer Success
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client**success**
REDUCE CHURN. INCREASE EXPANSION.
MAXIMIZE REVENUE.



- VP of Customer Success at ClientSuccess
- 10 years in Customer Success at hyper growth SaaS companies
- Experience in building, transforming and scaling Customer Success teams
- Award Winning Customer Success Executive

A playbook is a series of actions meant to be executed to help a customer achieve a goal or objective in a scalable manner.

ELEMENTS OF A PLAYBOOK

1.

**A Defined
Success
Outcome or
Goal**

2.

**Criteria on
who to target,
when and
why**

3.

**A list of
predetermined
steps and
activities**

4.

**Required
assets
including
templates,
scripts, decks,
etc.**

5.

**A tracking
mechanism**

PLAYBOOK CATEGORIES

LIFECYCLE



RISK



**GROWTH &
ADVOCACY**



OBJECTIVE



PLAYBOOK CATEGORIES

LIFECYCLE PLAYBOOKS

Lifecycle Playbooks support the execution of the standard strategic motions over the course of the partnership.

OBJECTIVE PLAYBOOKS

Objective Playbooks support our success framework which will ensure we have properly helped guide our customer through the tasks and activities that will achieve these outcomes.



GROWTH AND ADVOCACY

Opportunity and Advocacy Playbooks support the proactive motions to capitalize on the success and health of your customer.

RISK PLAYBOOKS

Risk Playbooks support the intervention and mitigation of risk behaviors and activities your customers demonstrate.

TOP 5 PLAYBOOKS EVERY SAAS COMPANY SHOULD HAVE

PARTNERSHIP KICKOFF

ONBOARDING

BUSINESS REVIEW

POOR HEALTH SCORE

RENEWAL

SAMPLE PLAYBOOKS

LIFECYCLE PLAYBOOKS

Budget Planning	CES Survey Follow Up	Churn Customer Interview
Customer Objectives Review (COR) Meeting	Executive Sponsor Engagement	Churn Customer Offboarding
Post-Sales Survey Follow Up	Post-Onboarding Survey Follow Up	New Customer Partnership Kickoff
Account Transition	Marketing Engagement	Renewal Management
New Contact	Customer Onboarding	Post-Onboarding Review
Product Release		

RISK PLAYBOOKS

Budget Constraints	Competitive	Loss of Power User/Champion
Lack of Product Adoption	Loss of Executive Stakeholder	Poor Engagement
Inadequate License Consumption	Passive NPS Score	Non-Intent to Renew
Onboarding > 100 Days	Detractor NPS Score	Merger & Acquisition (M&A)
Technical Support Risk	No Response NPS	Payment Delinquency
Poor Fit Customer	State of Business	Resell Playbook

GROWTH & ADVOCACY PLAYBOOKS

NPS Cross-Sell Opportunity	Case Study
Promoter NPS Score	Speaking Engagement
End User Licence Expansion	Customer Reference

PLAYBOOK OPERATIONS

TECHNOLOGY POWERED PLAYBOOKS

SuccessCycles

☰	▼ Pre-Sales (2)
☰	▶ AE to send the New Customer Survey https://forms.gle/tBWtPZQpgKtkmxHp6 (2)
☰	▶ AE to complete the Sales to CS Handoff form https://docs.google.com/document/d/1kH2VNvYdUnlPkogYyEh4HuChzufOgrB2fw2tyruKo48/edit?usp=sharing (2)
	+ Add new activity...
☰	▼ Post-Sales (4)
☰	▶ AE to Send Introductory Email https://docs.google.com/document/d/1T9z5LsLloDIMWYqiBwTACDUjzKSEtLDWnE-4cZKBf7I/edit?usp=sharing (2)
☰	▶ CSP to Reply to the Introductory Email https://docs.google.com/document/d/1hrHO9mXkSVgdoc1NwOWTjuGz34QzLmsih1RIApG4iTk/edit?usp=sharing (1)
☰	▶ CSP to Set Up the Partnership Kickoff Call (2)
☰	▶ AE to CSP Handoff Meeting (3)
	+ Add new activity...
☰	▼ Partnership Kickoff Prep (1)
☰	▶ CSP to Create the Partnership Kickoff Deck (3)
	+ Add new activity...
☰	▼ Partnership Kickoff Meeting (1)
☰	▶ CSP Hosts the Partnership Kickoff Meeting with the Customer (5)
	+ Add new activity...
☰	▼ Partnership Kickoff Follow Up (1)
☰	▶ Send the Memorialized Summary of your Meeting (5)



SERVING THE
CUSTOMER SUCCESS
COMMUNITY



Kristi Faltorusso

2020 Top 25 Customer Success Influencer | VP of Customer Success at ClientSuccess | Founder of CS Real Simple | Award Winning Customer Success Executive

Talks about #cs, #saas, #leadership, #customersuccess, and #customerexperience

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CUSTOMER SUCCESS LEADERSHIP BOOTCAMP WEBINAR SERIES

Every Tuesday in October at 1:00 PM Eastern / 10:00 AM Pacific



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- Oct. 5 - How to Execute a Customer Objectives Review (COR) Meeting that Executives Will Want to Attend
- Oct. 12 - Executing Account Transitions that Excite Customers and Reduce Risk
- Oct. 19 - Customer Offboarding and Exit Interviews to End on a High Note
- Oct. 26 - Designing a Voice of Customer Program to Power Your Future

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THANK YOU