

30/60/90 Plan

Strategic CS

Robert Statsky

Three Areas of Focus

Customer

- Understand the customer landscape and the metrics around them.
- Introductions to the important customers that would benefit from meeting the new head of the team
- Understand the engagement model
- Review Customer Feedback

Team

- Identify what success looks like
- Conduct training
- Agree on plans and individual development goals
- Host a team event, or Having a virtual Team Building Event

Personal

- Learn about the product suite
- Learn about the customer base
- Meet with cross-functional leaders and counterparts
- Begin to develop an understanding of the culture of the company/team

High Level 30-60-90 Day Plan

	Learning 0-30 days	Aligning/Executing 30 - 60 days	Refining 60 - 90 days
Customer	NRR, Adoption, Renewal Calendar, Historical context	Preliminary CS strategy: initial goals, milestones, and action plans.	Begin measuring results from new initiatives
Team	KPIs, Strengths, Opportunities, Goals, Motivations	Training, Knowledge Sharing, Plan Development	Finalize and communicate the CS strategy/personal IC goals
Personal	Product Knowledge, QBR Review, Cross-Functional Meetings	Develop an understanding of the culture of the team/company	Lead CS team meetings, reporting, success metrics

0 - 30 Days: Begin Strategic Development

- **Formulate a Strategy**
 - Start to develop a comprehensive customer success strategy tailored to Strategic Customer segments.
 - Identify opportunities for improvement in customer onboarding, adoption, and retention processes.
 - Begin to outline plans for fostering a culture of excellence, collaboration, and continuous improvement within the team.
- **30 day Targets**
 - **Customer**
 - Involved on calls with at least 1 customer onboarding in the first month
 - If the opportunity presents itself, sit in on one onboarding during the first month
 - **Team**
 - Review baseline metrics and averages across multiple KPIs (Team Goal)
 - Begin to establish clear goals and milestones for the team aligned with overall business objectives. Review customer outcomes, not just KPIs.
 - Work with the team on this and see what is feasible and worth striving for.
 - **Personal**
 - 30 QBRs in ~30 days
 - Listen to as many pre-recorded meetings with the customers as possible
 - Avg 1/day for the first month to get to ramped up as quickly as possible
 - Listen to at least 1 per CSM prior to meeting with each person to understand their presentation style and customer books a bit more.

0 - 30 Days : Understanding the Landscape

- **Metrics/Data**
 - NRR, Product Adoption, CSM Engagement, Renewal Calendar, Historical context, Team Performance Metrics (KPIs), Customer Outcomes, QBR completion/attendance/engagement
- **High Value Customers**
 - Introductions to the high value (High \$/High Importance) customers that would benefit from meeting the new manager
 - Understand the engagement model (How do we interact with our customers?)
 - What is the day to day like for the team/the customers in each segment?
 - Key players for each account, what does our specific customer-champion look like and what aspects of the product are they using?
- **Cross-functional Collaboration**
 - Meet with partners throughout the organization to better understand roles/responsibilities/historical perspective, opportunities for closer collaboration and pain points.
 - Conduct individual meetings with team members to understand their perspectives, goals, challenges and motivations
 - Schedule meetings with key stakeholders (Executive Leadership, Sales, AM, Product Management, Support) to understand their expectations and alignment with Strategic CS objectives.
- **Team Building**
 - 1:1s with each team member: 1 Career/Personal Focused, 1 Customer Focused
 - Team Building exercise

30 - 60 Days: Team Enablement

- **Employee Development**
 - Implement initiatives to mentor, coach, and develop the team of Sr. CSMs
 - Provide training sessions on effective customer engagement, relationship building, and problem-solving.
 - Examples: Objection handling, Product Adoption, QBR/Phone/Zoom Confidence
 - Encourage knowledge sharing and collaboration among team members.
 - Lay the groundwork for developing a knowledge base/content library for customer communications (if this exists, figure out if there is a way to optimize it)
- **KPI/Business Metric Dashboards**
 - Establish performance metrics and regular feedback mechanisms to track progress and drive accountability.
 - Agree on a 1:1 agenda template with the team to be used bi-weekly during 1:1s.
 - Track performance metrics on dashboards
 - Forecasting, outreach KPIs, QBR completion #/%
 - While this might exist already, I'd like to understand how we're using it and what the trends are, and ensure the team is behind either maintaining or improving the current averages.
- **Weekly Team Meetings**
 - Work with team to develop weekly topics for growth and best practice knowledge sharing
 - Work out a meeting calendar for the team to present.

30 - 60 Days: Customer Advocacy

- **Customer Feedback**
 - Develop processes to gather feedback and insights, and drive initiatives to address their needs and challenges.
 - What features do they like? What don't they like? What else is needed
 - What features are used and what some consistent themes across the customer base?
 - If we think of how most companies use a SaaS product, 80% of your customers will utilize some specific core features. How do we engage that untapped additional 20%?
 - What do we need to do to ensure more product adoption is possible?
 - Is it education? Pricing? Better onboarding? All 3? Figure out how to crack the adoption concerns and then begin to tailor customer outreach.
- **Relationship Management**
 - Begin to foster strong relationships with key stakeholders at customer organizations.
 - Join calls with the team, introduce myself, serve as an escalation point if there is an issue or a concern
 - Offer my time, join feedback calls
 - Make calls just for feedback with some of the higher-usage accounts
- **Customer Churn**
 - Review churned accounts for the last 12 months
 - See how it differs between customer segment (size, usage type, price)
- **Cross-functional Collaboration**
 - Begin to execute collaborative processes across teams:
 - CS teams, Marketing, Product, Support, Renewals, Sales, Account Management

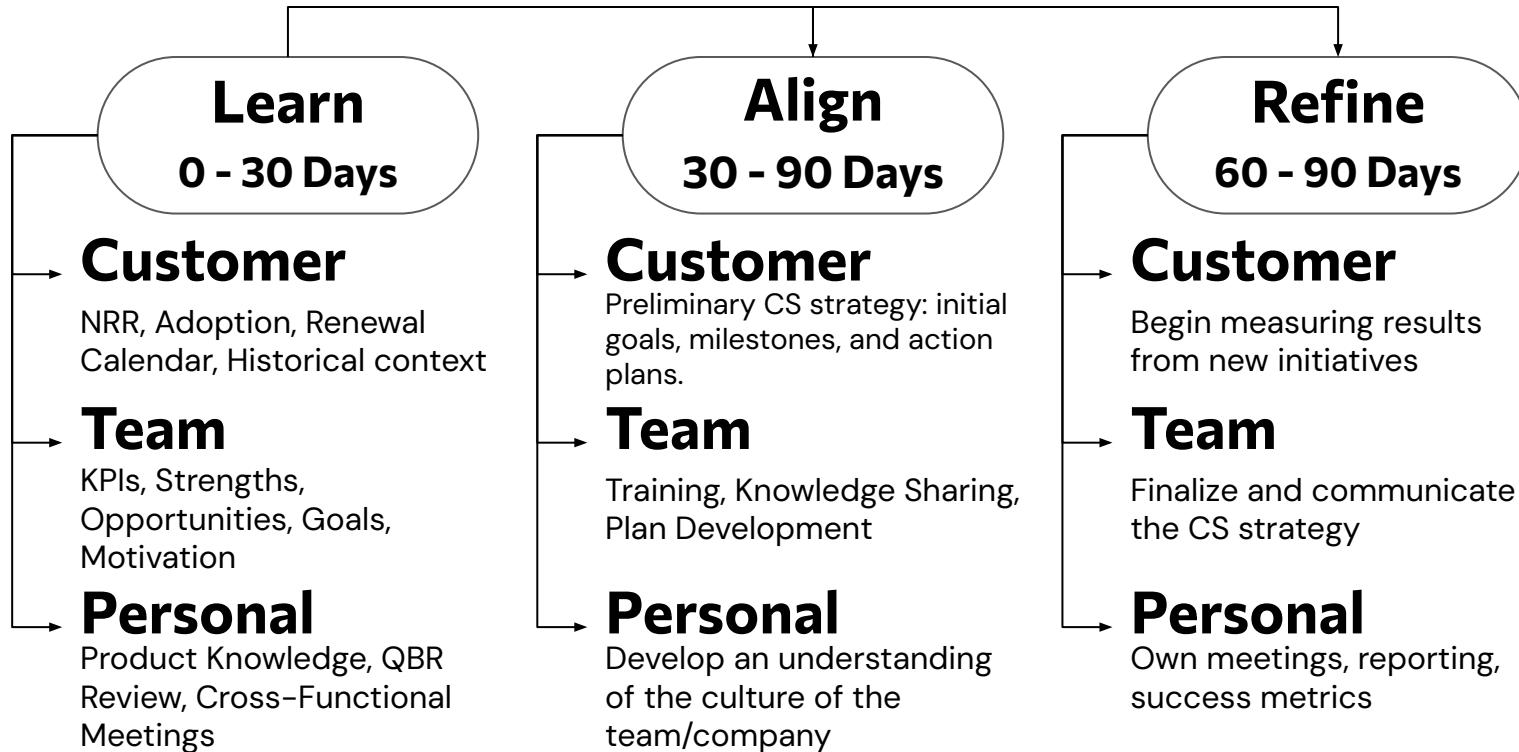
60 - 90 Days: Performance Optimization

- **CS Metrics/Dashboards**
 - Track legacy and newly-implemented success metrics to measure the effectiveness of CS initiatives and identify areas for future improvement.
 - QBRs
 - Attendance rate, # of customers asked, time spent talking (customer vs. CSM), level of customer engagement during the QBR
 - Transparent grading system for each QBR
 - Self-QBR scorecard/Peer QBR scorecard
 - Dissemination of QBR best practices
 - Retention rates per rep/industry/vertical/product type
 - What have we found to be one-off vs. consistent customer themes?
 - What are the best practices to help ensure retention?
- **Driving Retention**
 - Implement strategies to proactively identify and address potential churn risks, driving customer retention and renewal rates.
 - Begin testing new strategies across the team to ensure we're seeing results regarding product adoption and its impact on retention (see appendix)
 - I like to have as many quick wins per rep as possible
 - How do we share success within the team and cross-functionally? Who would benefit from the wins/losses and understanding of what is going on with our customer base?
- **Team Handoffs**
 - Collaborate with sales and marketing teams to ensure seamless handoffs between pre-sales and post-sales activities.

60 - 90 Days: Continuous Improvement

- **Team Development**
 - Ensure the team stays informed about industry trends, best practices, and emerging technologies in B2B SaaS Customer Success.
 - Promote involvement in the CS Community: Empower the CSMs to get training and development throughout the customer community (GGR, continuous learning and resources, ensuring they are following the appropriate people who put out consistent content on the subject on LinkedIn)
 - Understand Vimeo Team Enablement Processes/Offerings
 - Foster a culture of continuous learning and improvement.
 - What does the product adoption and enablement content calendar look like? What resources are we building for our customers on a consistent basis and what can we do to move the customer relationships forward?
- **Tech Stack**
 - Post-evaluation of the current tech-stack, encourage innovation within the team and explore opportunities for leveraging new technologies.
 - Airtable, Salesforce, Loom/Vidyard, Gong
- **Personal Goals**
 - Track the results of the 90 day document (see appendix)
 - How much have I learned the Product offering, helped drive process, developed the team?
 - Present my findings to cross-functional partners from a completed customer onboarding to help promote improvement and ensure optimization.
 - Ensure I have consistent and productive meetings with all key cross-functional stakeholders
 - Earn the trust of my team/my colleagues

Conclusion



Appendix

Tracking Plan Progress

Timeframe	Goals	KPIs	Completed? (Y/N)	Notes/Next Steps
30 Days	Understand team dynamics and identify initial areas for improvement.	1. Conduct individual meetings with each team member to assess their strengths, weaknesses, and goals. 2. Review team performance metrics such as customer satisfaction scores, retention rates, and response times. 3. Identify one key area for improvement within the team structure or processes based on feedback and analysis. 4. Initiate team-building activities to foster better collaboration and morale. 5. Review existing customer success strategies and identify potential gaps or inefficiencies. 6. Introductions to the high value (\$/importance) customers that would benefit from meeting the new manager 7. Understand the engagement model (How do we interact with our customers?) 8. Meet with others throughout the organization to get a sense of where the improvements lie. 9. 30 QBRs in ~30 Days 10. 1:1s with each team member a. Sr. CSM (newer higher) i. Customer Focused Meeting ii. Career/Personal Development Focused b. Sr. CSM i. Customer Focused Meeting ii. Career/Personal Development Focused 11. Join and help support a customer onboarding		
60 Days	Develop a preliminary customer success strategy and initiate team training.	1. Draft a preliminary customer success strategy document outlining initial goals, milestones, and action plans. 2. Conduct initial training sessions for the team on effective customer engagement, relationship building, and problem-solving techniques. 3. Observe an improvement in team cohesion and communication, as evidenced by increased collaboration and shared knowledge. 4. Develop a plan to address identified areas for improvement in team processes or workflows. 5. Begin collecting feedback from team members and stakeholders on potential strategy adjustments. 6. 1:1 Agenda Template 7. Formulate Tracking Dashboard/Improve upon existing one 8. Present at Weekly Meeting 9. Organize Customer Feedback loop 10. Churned Account Review		
90 Days	Refine customer success strategy and implement targeted improvement initiatives.	1. Finalize and communicate the customer success strategy, incorporating feedback from team members and key stakeholders. 2. Implement at least two improvement initiatives aimed at addressing identified areas for enhancement within the team or processes.		

Sample Agenda for 1:1s

Facilitate an open and productive discussion to align on goals, address any challenges, and provide support as needed.

KPIs Always listed out/visible

1. Check-in on Highly Important Action items (10 minutes)
2. Feedback and Coaching (10 minutes)
3. Goal Setting and Alignment (5 minutes)
4. Action Items/Next Steps (5 minutes)

Product Adoption Playbook

1. Segment your book of business to prioritize your efforts. Focus on customers who are most likely to benefit from the new feature or those whose issues could be resolved with it.
2. Book a meeting with the customer and set a clear agenda. Stick to that agenda when you get the call scheduled so you are prompt and you don't waste their time.
3. Clearly communicate the value proposition of the new feature. Explain how it can address their pain points or improve their current processes. Use specific examples and case studies if possible.
4. Tailor a personalized demo to their specific needs and challenges. Assure the customer that you will provide comprehensive training and support during the transition. Address any concerns about the learning curve or potential disruptions.
5. Be proactive in addressing any objections or concerns they may have. If there are specific issues related to the new feature, provide solutions or workarounds. Be transparent about what the new feature can and cannot do.
6. Share success stories, case studies or anecdotal feedback of how other customers found value in adopting the new feature.
7. After the customer has tried the new feature, follow up regularly to gather feedback. Use this feedback to make improvements and further tailor the solution to their needs. Use this opportunity to demonstrate your commitment to continuous improvement. Show that you're responsive to feedback and dedicated to helping them succeed.