

Customer Success Checklist

CS Team:

- Documented job roles and responsibilities, expectations, and performance metrics for each CS team member
 - Reward / recognition system to motivate members
 - Individual performance review of each member
 - Development and training plans
 - Knowledge and skills level of team members match requirements of the various CS processes
 - Formal screening methods for job applicants for required experience, knowledge, skills and personality characteristics
 - Take action based on periodical CSM engagement and satisfaction review
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Planning:

- Documented Customer Success Plan (goals, strategies, objectives, metrics, timelines, actions required)
 - Goals and objectives aligned with overall business plan and processes
 - Overall plan enhances the organization's value proposition, sustainability and competitiveness within the industry
 - Track progress of plan execution and results
 - Periodic meetings to share status and progress of plan with other functions in the organization
 - Review and update plan at least once every year
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Segmentation:

- Analyze similarities and differences between each customer segment
 - Define personas of each segment
 - Gather data (e.g. customer feedback from surveys, business reviews) based on segment and persona
 - Incorporate analysis of segments in corporate and functional planning processes
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Processes:

- Conduct processes based on the matching of respective segments with the appropriate customer journey
 - Customer experience design aligns with the requirements and expectations of the different segments
 - Define and implement appropriate triggers, actions, & metrics in the workflows
 - Optimize all available resources
 - CS processes and systems add value and fulfill organization's value propositions
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Metrics:

- Metrics include a mix of both leading and lagging indicators
 - Selected metrics track progress of the points in development plans effectively
 - Appropriate indicators are set when action is required
 - Conduct of regular review based on metrics
 - Regular refinement and update of metrics
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Management:

- Management leaders make effort to reinforce organization's vision, value propositions, priorities, and plans
- Management leaders provide necessary support to ensure accomplishment of goals
- Management leaders encourage and focus on participation and learning
- Management leaders support open communication culture where feedback is encouraged from employees, customers, partners and other stakeholders
- Management leaders actively drive organizational change and development

