Create an experience, not a to-do list

Your Customer Experience *Playbook*

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Your new customer just signed the contract. *Now what?*

After you close the sale, your new customers need to know **what** to do next and **how** to do it correctly in order to achieve their desired outcomes.

Getting to this "Aha" moment doesn't happen by accident.

If you don't have a strategy for guiding your customers to success, customers will be forced to learn through trial-and-error, a frustrating experience that often leads to buyer's remorse and ultimately, customer churn.

32% of customers will abandon after just one bad experience[1]

The biggest reason for customer churn is *unmet expectations*…

The *seeds of churn are planted early*, and those seeds are planted deep if the experience is terrible.

Lincoln Murphy
Author of **Customer Success**

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Create an experience,
not a to-do list

Customers today are not satisfied with just following a Do-It-Yourself checklist or watching webinars. They demand more service from their vendors.

Customers expect vendors to help them hit the ground running, stay on task, and achieve their goals.
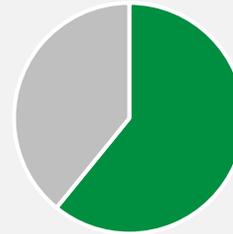
The customer is looking to **you** to help them achieve their desired outcome...

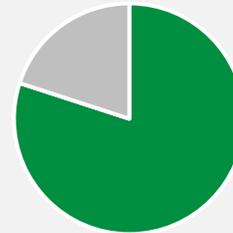***It's why you exist. It's why customers chose you over the next best alternative.***
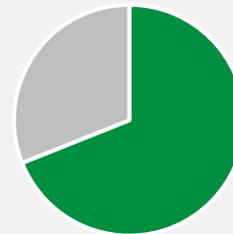
- Lincoln Murphy
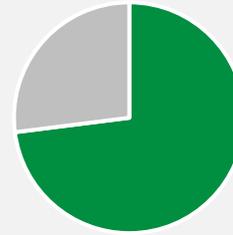
73% of customers say customer experience is a key buying factor[1]

42% of customers would pay more for better experience[1]

80% of companies expect to compete mainly on customer experience[7]

Effective onboarding reduces customer churn by 60%[2]

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Develop a strategy

To help guide your customers to success, industry experts recommend creating a strategy that has clear milestones and objectives for helping customers achieve their goals.

Share this strategy with customers and be transparent with them so they can see the big picture and have visibility into what's going on.

Leverage industry best practices and follow a 5-step strategy.

When you ensure the customer achieve their desired outcome, *retention becomes the result.*

- Lincoln Murphy

Step 1
Preboarding

Hand-off from sales, understand the customer's pain-points, and prepare for the kick-off meeting.

Step 2
Onboarding

Identify customer challenges and establish baseline. Map out customer goals, key stakeholders, and success metrics.

Step 3
Inboarding

Create execution plans: 30, 60, 90-day plan for achieving customer goals. Identify task owners, clarify roles & responsibilities, and begin training and setup.

Step 4
Execution

Execute tasks according to plans. Monitor, measure, and track performance.
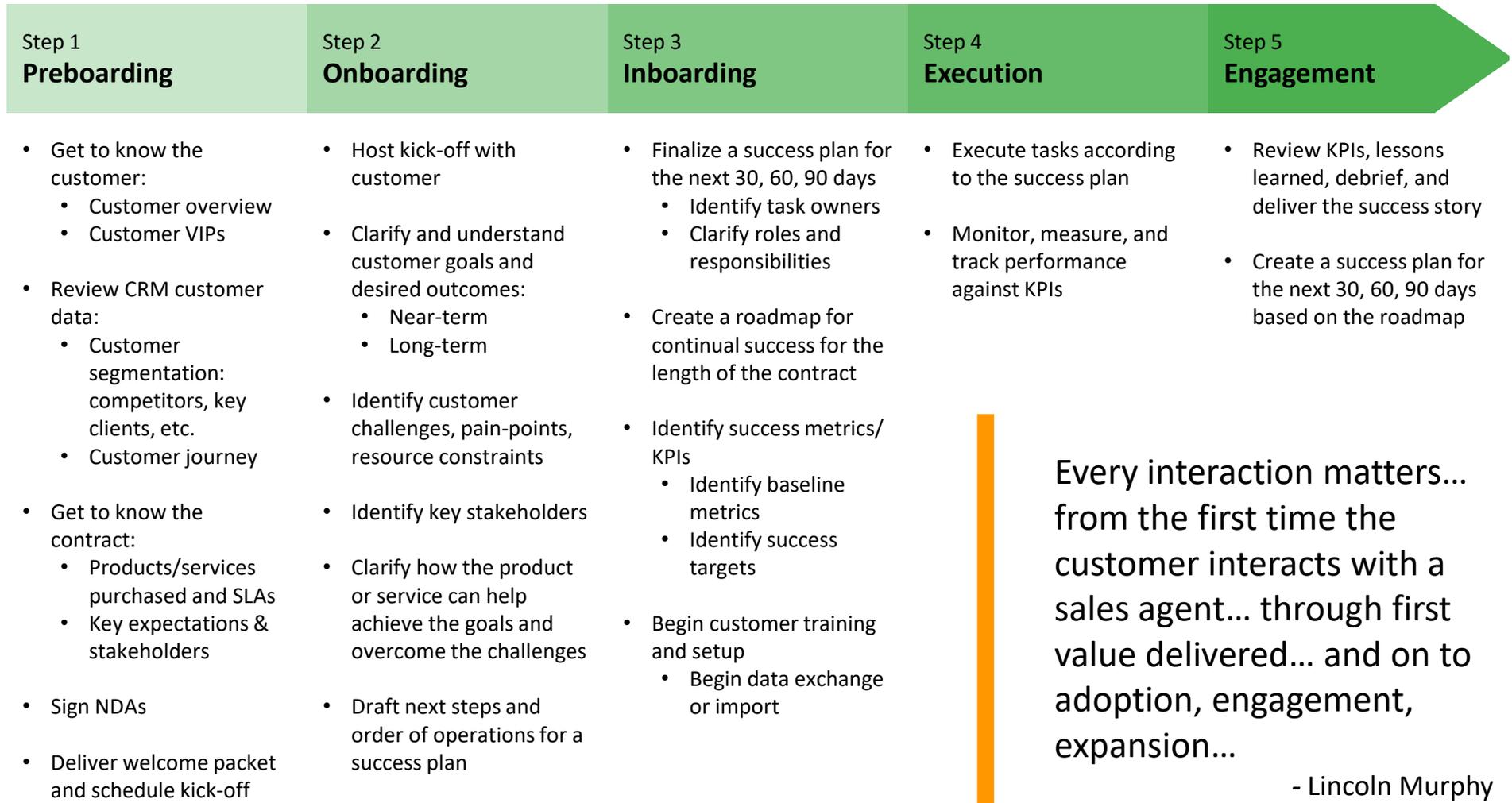
Step 5
Engagement

Review wins and successes. Drive engagement, adoption, and expansion.

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Execute a playbook of activities

Based on the strategy, execute a detailed list of activities and interactions for each step to ensure that your customers understand how to use your product or service to achieve their desired outcomes. *Customize this list for your organization and product or service.*

Step 1 Preboarding	Step 2 Onboarding	Step 3 Inboarding	Step 4 Execution	Step 5 Engagement

Step 1
Preboarding

- Get to know the customer:
  - Customer overview
  - Customer VIPs

- Review CRM customer data:
  - Customer segmentation: competitors, key clients, etc.
  - Customer journey

- Get to know the contract:
  - Products/services purchased and SLAs
  - Key expectations & stakeholders

- Sign NDAs

- Deliver welcome packet and schedule kick-off

Step 2
Onboarding

- Host kick-off with customer

- Clarify and understand customer goals and desired outcomes:
  - Near-term
  - Long-term

- Identify customer challenges, pain-points, resource constraints

- Identify key stakeholders

- Clarify how the product or service can help achieve the goals and overcome the challenges

- Draft next steps and order of operations for a success plan

Step 3
Inboarding

- Finalize a success plan for the next 30, 60, 90 days
  - Identify task owners
  - Clarify roles and responsibilities

- Create a roadmap for continual success for the length of the contract

- Identify success metrics/ KPIs
  - Identify baseline metrics
  - Identify success targets

- Begin customer training and setup
  - Begin data exchange or import

Step 4
Execution

- Execute tasks according to the success plan

- Monitor, measure, and track performance against KPIs

Step 5
Engagement

- Review KPIs, lessons learned, debrief, and deliver the success story

- Create a success plan for the next 30, 60, 90 days based on the roadmap

> Every interaction matters… from the first time the customer interacts with a sales agent… through first value delivered… and on to adoption, engagement, expansion…
>
> - Lincoln Murphy

Be consistent, transparent, and knowledgeable

Driving customers to their desired outcomes require *many* customer-facing interactions and activities. So, maintain a consistent customer experience and ensure smooth hand-offs between team members by clarifying everyone's roles & responsibilities and embedding instructions & governance with each task.

Create transparency and accountability by tracking progress from end-to-end and establishing metrics and KPIs that measure performance.
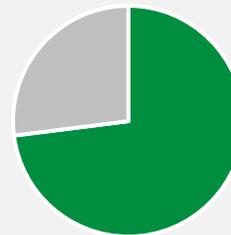
Don't just settle for getting things done. *Get it done well*.

75% of customers want a consistent experience regardless of *who* or *how* they engage[6]

80% of customers say speed, convenience, knowledgeable help, and friendliness are critical to great customer experience[1]

73% of customers expect companies to understand their needs and expectations[8]

66% of customers feel that valuing their time is the most important thing a company can do for them[3]

46% of customers will abandon if the employees are not knowledgeable[1]

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Scale with automation

Let Pipeline automate tedious, administrative tasks such as: assigning to-do's, coordinating hand-offs, providing instructions, gathering data, notifying stakeholders, and more!

It can be difficult securing time on customer calendars so don't squander your allotted time on discussing status or repeating instructions.

Automate the mundane so you and your customers can focus on what's important—achieving results.

68% of customers prefer self-service channels for simple questions, issues, updates, and notifications[8]

Customers didn't choose you because of your ability to send reminders or check spreadsheets...

They chose you for your expertise. Focus your time and energy on that, not on administrative tasks.

John Way
Founder, **Pipeline**app.io

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Get started now with a Pipeline template

Turn this playbook into an automated process with a series of easy-to-follow steps orchestrated by Pipeline and ensure accountability and consistency.

Customize the steps to meet your organization's needs and eliminate the emails, spreadsheets, and the constant back-and-forth. Spend less time chasing status or repeating instructions and more time delivering value.

Transform how you collaborate with clients by using Pipeline

Include your customers in this process and foster transparency and trust. Help customers maintain momentum and accelerate them towards their desired outcomes with centralized tracking, governance, and enablement.

Get started now at pipelineapp.io »

1 ⌄ Get to know the customer and contract ✔

2 ⌄ **Uncover customer goals and objectives**

3 ⌄ Create and finalize success plan

4 ⌄ Execute and monitor progress

5 ⌄ Review, debrief, and deliver success story

References

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5. ZenDesk: Self-service: Do customers want to help themselves?
6. Qminder: 37 Stats You Didn't Know About Customer Service
7. Garter: Realizing the Benefits of Superior Customer Experience
8. Salesforce: State of the Connect Customer

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