Customer Success strategy template

Date [insert]

| **Customer Success Strategy for [insert Business Name]** |
| --- |

This is to outline the customer success strategy, [for information/ for approval].

The strategy is strategically solid because [insert reason] and financially sound based on [insert data].

The following teams have been involved and concur with this approach:

* [Team #1]
* [Team #2]
* [Team #3]

**Objective**

[Write in one or two short sentences where you want to get to in words.]

**Goal(s)**

[Write in one sentence where you want to get to in numbers.]

**Strategies**

* Where to play

This is essentially the outcome of your segmentation analysis:

* + which industry sectors to focus on,
  + which products or services,
  + which customer size or type.

It’s helpful to also highlight what you are recommending NOT to focus on.

* How to win

Include here elements such as:

* + the high touch/low touch approach by customer segment
  + pricing strategy,
  + renewals process,
  + training for the customer and for the internal teams.

**Measures**

[How will you track if you are moving in the right direction?]