

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?]