

## CUSTOMER SUCCESS ASSESSMENT

## ACHIEVE WORLD CLASS CUSTOMER SUCCESS WITH END-TO-END STRATEGY DESIGN

Whether you already have a customer success team in place, or you're just about to, this assessment will ensure your customer success practice is aligned with your company's go to market strategy, unique business model and best in class methodologies



### What is the Customer Success Assessment?

Our Customer Success assessment is a strategic analysis designed to uncover key challenges as well as outline quick wins and long term initiatives that will accelerate your ability to exceed the company's annual retention and expansion goals.

#### During the Customer Success Assessment

**process,** company leaders engage in practical discussion to explore current processes, policies, and use of systems.

**Based on the findings,** CSM Practice delivers a set of recommendation and roll-out plan to advance your organization to a higher level of customer success maturity and achieve best in class customer success.

## WHAT DOES THE ASSESSMENT INCLUDE?



### GAP ASSESSMENT

CSM Practice will analyze your processes, policies, people, and systems.



### STRATEGY DESIGN

Our team will create a full customer success strategy blueprint for your business with clear goals and methods for achieving them at scale.



### STRATEGY IMPLEMENTATION

We will support you through the strategy implementation process to drive accountability and accelerate adoption of new policies, playbooks, and templates by the entire organization.

## CUSTOMER SUCCESS ASSESSMENT

**ACHIEVING YOUR DESIRED OUTCOMES**

At the onset of the customer success assessment, we will clearly outline your desired business outcomes and company go to market strategy. We will then identify critical areas of focus, such as:

- Developing prescriptive risk mitigation strategies.
- Maximizing CSM technology usage.
- Increasing expansion and adoption.
- Growing advocacy to support acquisition.
- Embracing scalable methods.
- Supporting change management.

As a result, each assessment is tailored to the organization at hand.

**THE IMPACT**

Organizations that completed the assessment process:

- Understand the gaps and the appropriate priorities needed to develop a customer success strategy for their organizations.
- Develop and execute a strategic plan that breaks the silo and help their entire company transition to a customer-centric model.
- Implement the systems and activities necessary to scale the customer success initiatives within their organization.

*"There were no challenges we put in front of CSM Practice that they hadn't seen before. They asked questions we hadn't even thought of yet which challenged our assumptions."*

**Disha Gosalia**

*VP of Customer Success at New Reli*