**Gainsight**

The Customer Success Company

# Our Purpose

To be living proof that you can win in business while being human first

# Our Mission

Enable you to deliver success for your customers and sustainable growth for your business
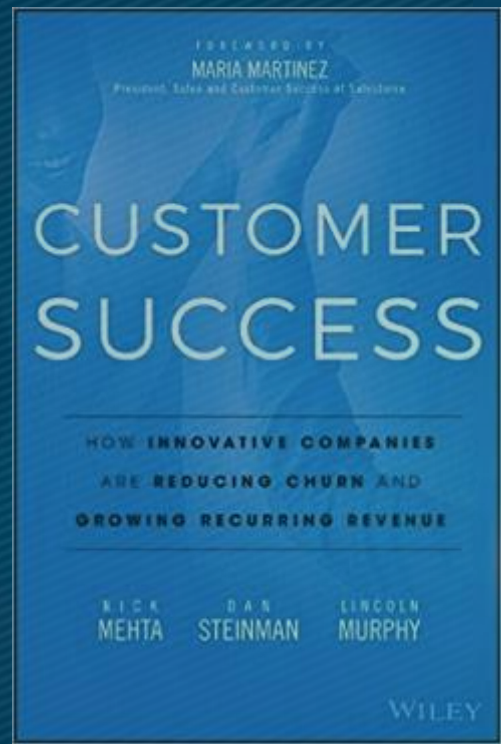
Golden Rule     Success for All     Childlike Joy     Shoshin     Stay Thirsty

**Platform**　**Expertise**　**Community**

Gainsight

# Gainsight Powers Customer Success At

## 49%
**Publicly Traded Cloud Companies****

box  workday.
twilio

## 67%
**Top Software Companies***

Adobe  ca technologies
Hewlett Packard Enterprise

## Global 2000 Brands
**Industry Leaders**

GE  THOMSON REUTERS®
McKESSON

# It's a new world
## Your customers have more power than ever before

# Disruption is Everywhere

At current rates, half of the S&P 500 will be replaced over the next 10 years.[1]

| Cloud | Social | Subscription |
|---|---|---|

More
**CHOICES**
for Customers

More
**POWER**
for Customers

More
**RISK**
For You

$XXX per month
$XXX per month
$XXX per month

[1] Heron Consulting

Customers Expect **Outcomes,** not Transactions

# Customer Success is More than ☺

$$ CS = CX + CO $$

Customer Success

Exceptional Experiences

Desired Outcomes

More than ever before,
it's an *imperative* to make your
customers successful

# What Our Company Looks Like To Us

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                          │   CEO   │
                          └─────────┘
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│Sales │ │Marketing │ │Customer  │ │Engineering│ │Product │ │ CFO  │
│      │ │          │ │Success   │ │           │ │        │ │      │
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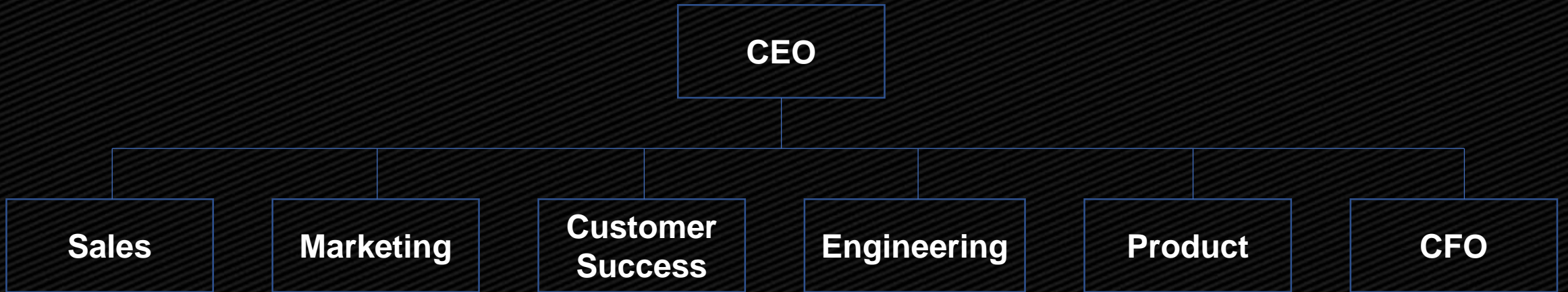
# Silos Destroy Customer Success

**Marketing**   **Sales**   **Services**   **Support**   **Product**   **Finance**

*Drive Leads*   *Close Opportunities*   *Execute Projects*   *Close Tickets*   *Ship Updates*   *Bill and Invoice*
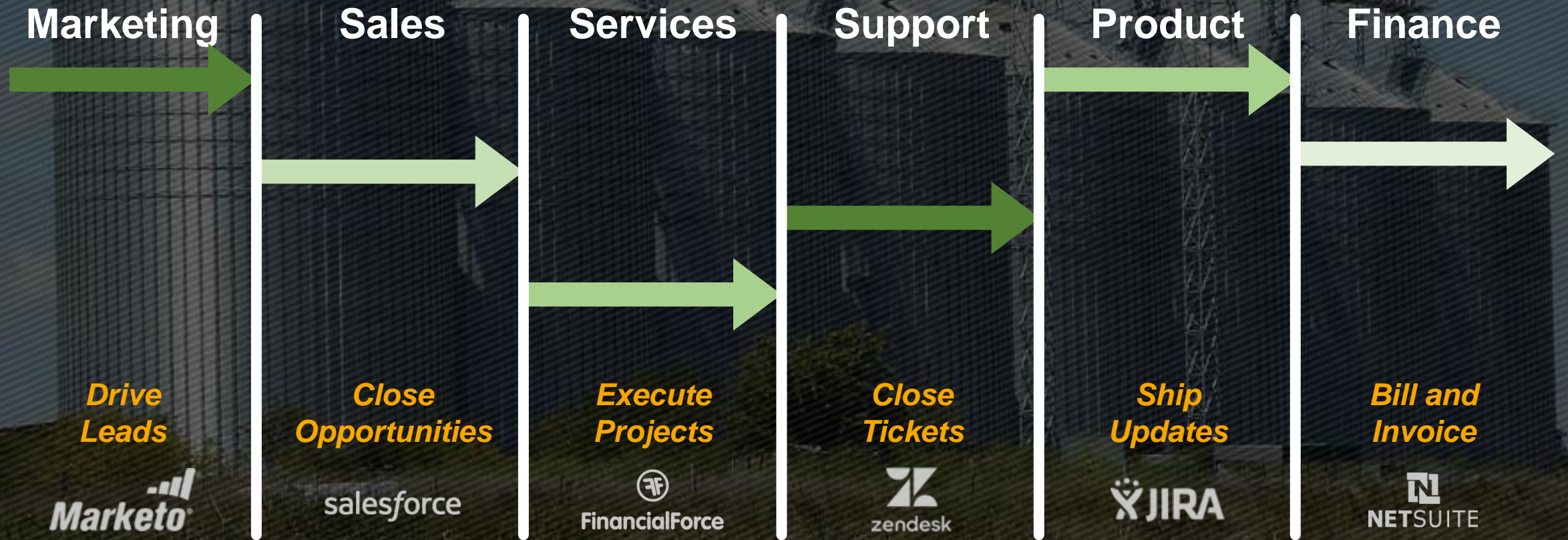
# The Effect on the Customer Journey

CEO

Product / Engineering

Marketing

Sales

Customer Success

(…and other departments)

Handoffs between silos
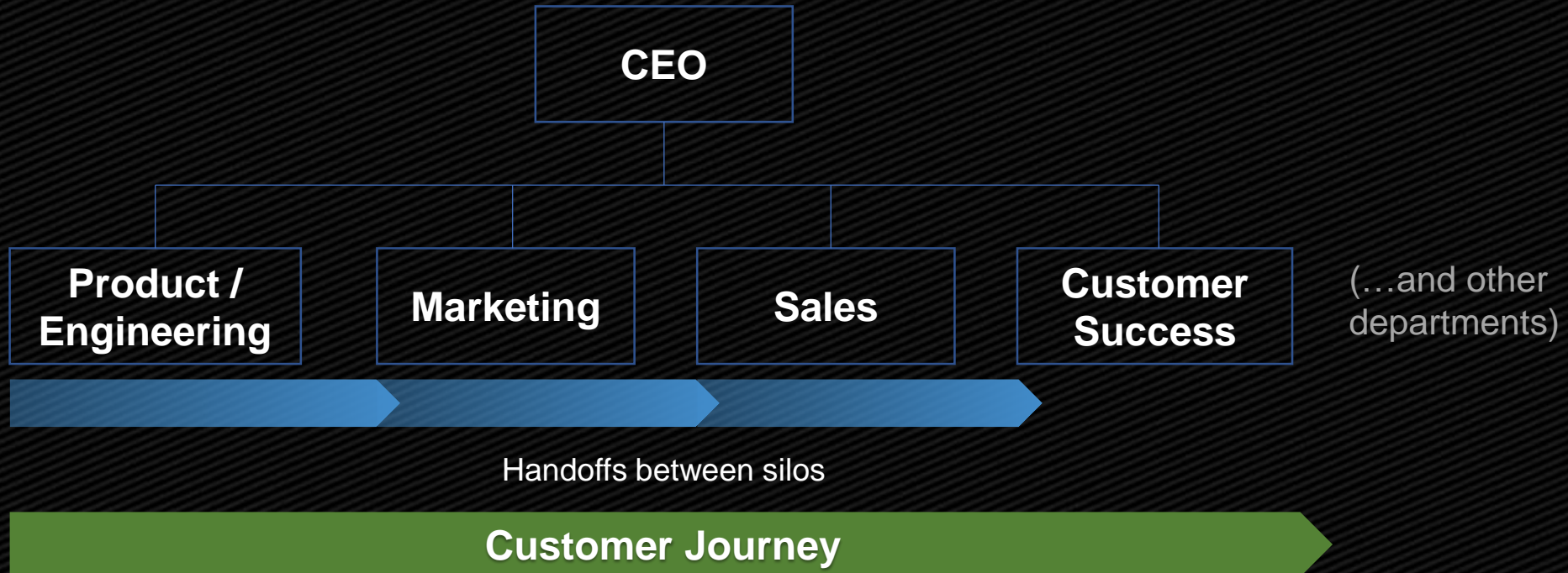
Customer Journey

# Stages of Customer Success Maturity

**Transform**
Rally your entire company around
the mission of customer success

**Outcomes**
Proactively deliver customer
outcomes at scale

**Insights & Actions**
Turn data into meaningful
actions across your team

**Reactive**
Manage escalations
on a case-by-case basis

# Elements of Customer Success

**INSIGHTS & ACTIONS**

| | |
|---|---|
| 1 **Cv** 360° Customer View | 2 **Lm** Lifecycle Management |
| 3 **Cx** Experience Health | 4 **Co** Outcomes Health |

**OUTCOMES**

| | | | |
|---|---|---|---|
| 5 **Am** Adoption Management | 6 **Rm** Renewal Management | 7 **Em** Expansion Management | 8 **Ae** Advocate Engagement |
| 9 **Sa** Stakeholder Alignment | 10 **Re** Risk Escalation | 11 **Sp** Success Planning | 12 **Tt** Tech Touch |

**TRANSFORMATION**

| | |
|---|---|
| 13 **Su** Support Experience | 14 **Se** Services Experience |
| 15 **Pr** Product Success | 16 **Cs** Company Success |

GAINSIGHT CUSTOMER SUCCESS PLATFORM

# Journey Mapping

Share with your Customer

## Customer Success =CX+CO

Understand Customer Moments of Truth and Pain Points; align with desired outcomes

## Cross-Functional Synergies

Maximize collaboration across teams and reduce functional tensions

## Direct Resources & Investments

Identify where to best direct your limited resources for the highest impact

*Know what success is for your customer across their entire lifecycle as your customer*
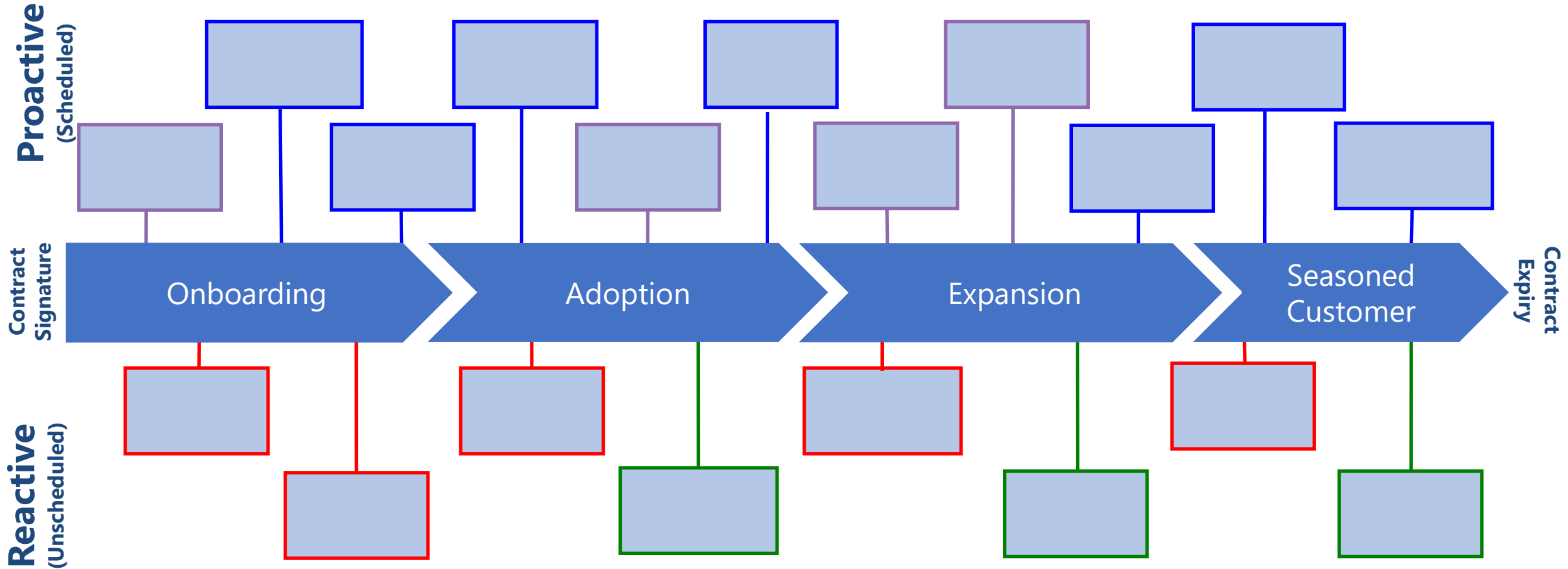
# TOOLS FOR CREATING JOURNEYS
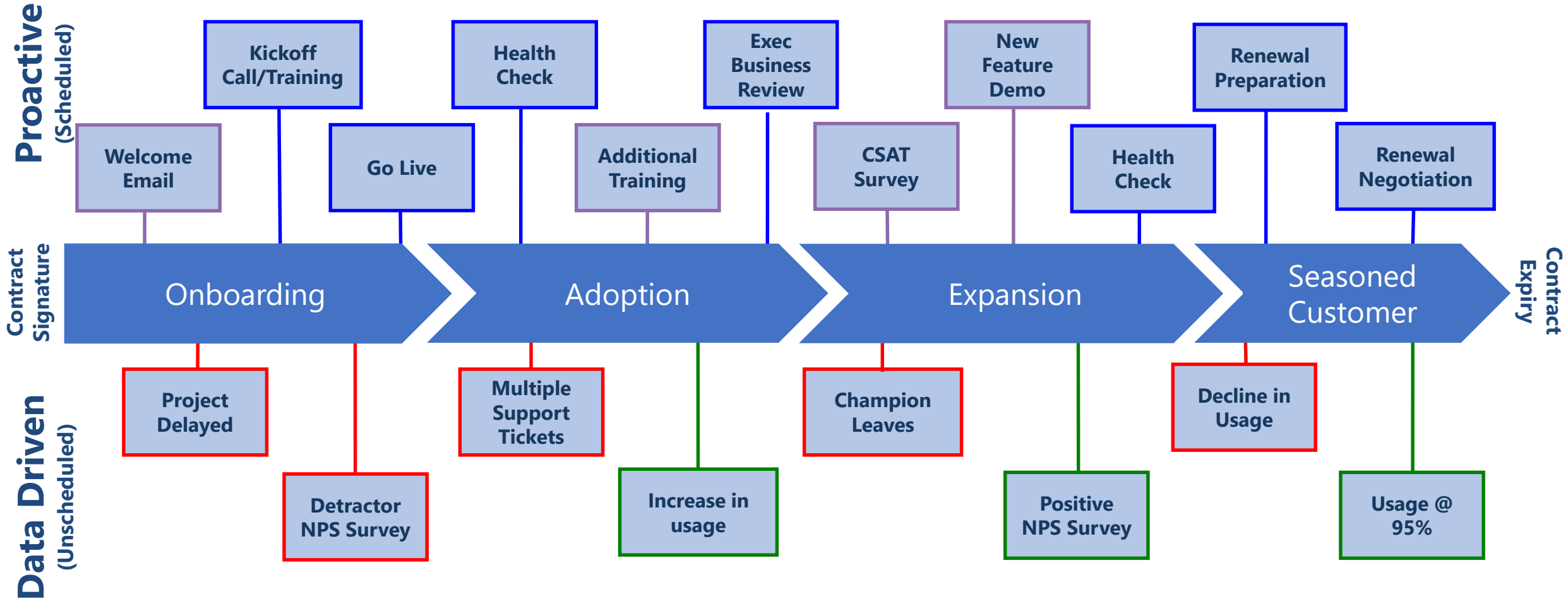
Doesn't really matter.

| Know the desired outcome | → | Visualize it however you want | → | Present it appropriately to the customer |

# Sample Customer Journey

1:M Outreach = Purple        1:1 Events = Blue        Risk = Red        Opportunity = Green

# How To Create Your Journey Map

1. Define your customer segmentation

2. Define the customer stages

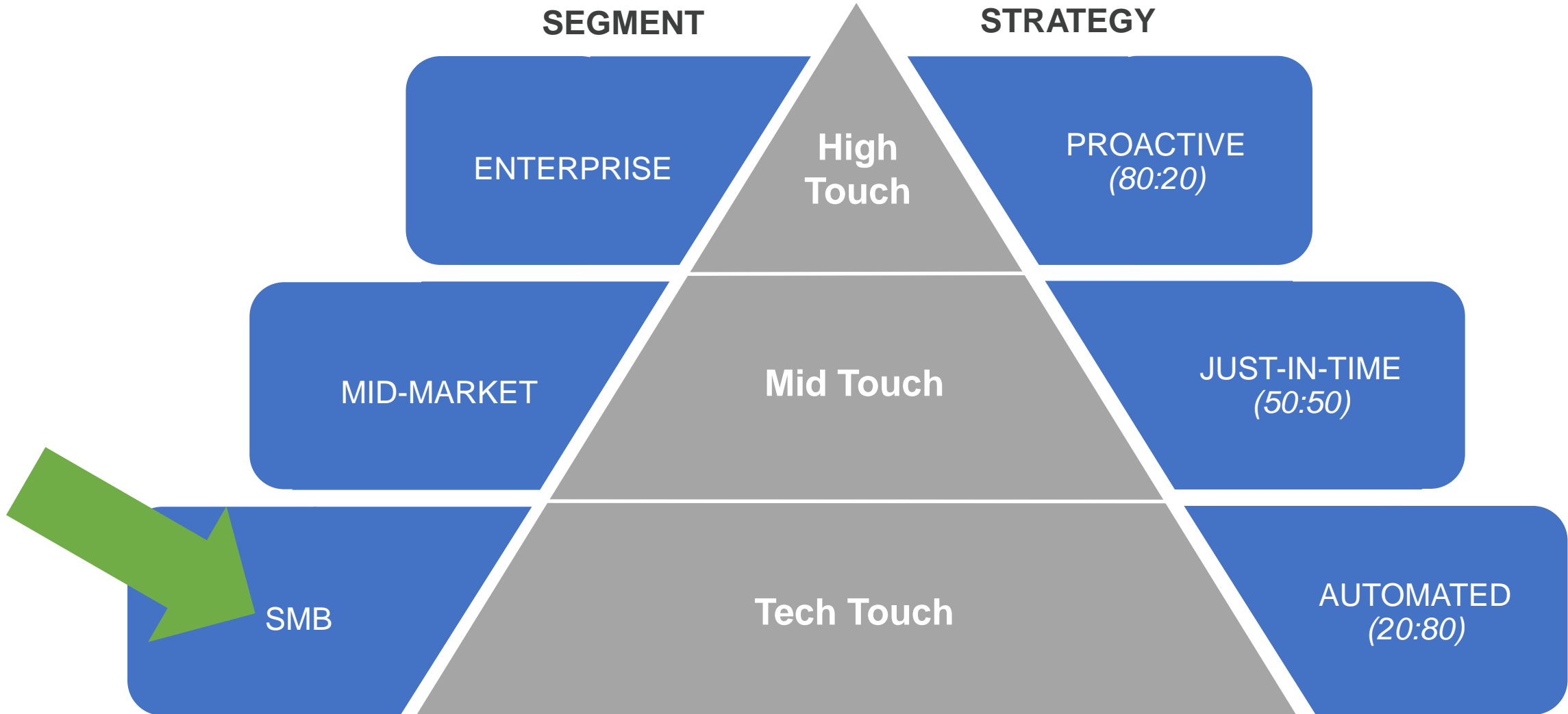3. Identify "moments of truth" along the journey

4. Identify the key customer stakeholders (personas)

5. Create the Calls to Action, playbooks and tech-touch outreaches

# 1. Choose the Segment

# 2. Define the Key Phases and Stages for your Lifecycle

| Phase | Land | Onboard | | Adoption | Grow/Renew | |
|-------|------|---------|---|----------|-----------|---|
| Stage | Initial Sell | Welcome | Deploy | Adopt | Renew/Expand | Deploy (2) |

Sale Close

First Value (Launch)

X Days to Renewal

Expansion Oppty

# 3. Brainstorm Key Touch Points and Prioritize "Moments of Truth" Across the Lifecycle

| Phase | Land | Onboard | | Adoption | Grow | |
|---|---|---|---|---|---|---|
| Stage | Initial Sell | Welcome | Deploy | Adopt | Renew/Expand | Deploy (2) |

## What is a Moment of Truth?

- Those select interactions when customers invest a high amount of emotional energy in important outcomes

- Superb handling of these moments requires placing the customer's experience and expectations ahead of your company's and employee's agendas

- Contrast MoT's with customer Pain Points

# Template: Moments of Truth

| Phase | | | | | |
|---|---|---|---|---|---|
| **Stage** | | | | | |
| **Key Activities** | | | | | |
| **Customer Experience & Outcome** | | | | | |
| **Key Results** | | | | | |

- What are the key activities that occur in each stage that dictate a successful customer experience and outcome?

- Think about what the customer is experiencing during each stage as these activities are taking place.

- What are the key results and outputs that you want from each stage?

# Brainstorm Exercise

# 4. Define Key Customer Contacts for Each Segment

**For each segment**

- Who are the key contacts that we need to interface with along the journey?

- In one sentence: what does each person want/need?

- Who should be mapped to the client?

**Customer**

- CXO / head of BU / GM
- VPs of CS
- Directors
- Operations
- End Users
- Admins

**MAP**

**Your Company**

- Exec Sponsor
- Head of CS
- Segment Director
- Services
- Support
- Sales

# Define the Key Personas

| Persona | What we want from them | What they need from us |
|---|---|---|
| **Executive Sponsor** | | |
| **Key Administrators** | | |
| **Product champions** | | |
| **End-users** | | |

# 5. Build Out Playbooks (RACI) and/or Email Outreaches for Each Moment of Truth

## Pre-Close Meeting

**Roles Involved:** Account Executive, SDR, Solutions Consultant, Client Outcomes Manager, Project Manager, Solutions Architect, RVP, Executive Sponsor, Client Outcomes Director

**Description:** Pre-close meeting where Sales introduces Client Outcomes and Onboarding team members to provide momentum leading up to contract signing.

| Task | Owner | Support |
|---|---|---|
| Tentative Post-Sales Staffing | RVP, COD | AE, PM, SA |
| Schedule Pre-Close Meeting: invite all customer and Gainsight contacts | AE | RVP, CO, PM, SDR, SC |
| Pre-Close Meeting Internal Prep:<br>• Share all artifacts with Post-Sales team<br>• Co-create deck with Client Outcomes handling strategy and Project Manager handling Onboarding<br>• Hold internal preparation sessions | AE | RVP, CO, PM, SDR, SC |
| Execute Customer Pre-Close meeting, with different roles presenting appropriate sections: CO: Strategy, PM: Proposed Project Plan/Onboarding Processes | AE | RVP, CO, PM, SDR, SC |
| Establish:<br>• Phased approach, with success criteria by phase<br>• Organizational chart<br>• Use cases by team across the customer organization | CO | PM |
| Get verbal commit from customer to continue the process | AE | RVP |
| Create Success Plan following Pre-Close meeting | CO | AE, PM |
| Begin creation of Project Plan | PM | CO, SA |

## Internal Sales to Post-Sales Handoff

**Roles Involved:** Account Executive, SDR, Solutions Consultant, Client Outcomes Manager, Project Manager, Solutions Architect, RVP, Executive Sponsor, Client Outcomes Director

**Description:** Post-Sales team is finalized, Sales provides all requisite information for a smooth handoff, and Project Manager schedules customer welcome call.
**Trigger:** Contract Signed
**Owner:** AE

| Task | Owner | Support |
|---|---|---|
| Finalize Post-Sales team assignment across Client Outcomes, Onboarding, Technical Success | COD | AE, ES, RVP, Tech Success |
| Hand off all materials from Sales process to Post-Sales team | AE | RVP, CO, PM, SDR, SC, SA |
| Confirm creation of org chart and place all customer contacts within org chart | AE | RVP |
| Execute internal handoff call and review:<br>• Org chart<br>• Customer needs and nuances<br>• Potential risks<br>• Necessary factors for creating Project Plan | AE | SC, RVP, CO, PM, SA, Tech Success |
| Create Customer-to-Gainsight Map | CO | AE, RVP |
| Update Key Contacts, Sponsor Tracking, and Gainsight roles in GonG | CO | |

## Executive Business Review

**Roles Involved:** Executive Sponsor, Client Outcomes Manager, Project Manager, Client Outcomes Director, Account Executive, RVP

**Description:** Regular post-launch Executive meetings to review progress to date, assess strategic direction, and establish plan going forward

| Task | Owner | Support |
|---|---|---|
| Set meeting location, date, timing with Customer | CO | PM, ES, COD, AE, RVP |
| Align on meeting agenda, objectives, pre-requisites, roles & responsibilities internally | CO | PM, ES, COD, AE, RVP |
| Align on meeting agenda, objectives, pre-requisites, roles & responsibilities with customer | CO | PM, ES, COD, AE, RVP |
| Prepare deck internally:<br>• Review of key business challenges and Success Plan progress<br>• Deep dive into adoption, initiatives, progress to date<br>• Validate ROI<br>• Presentation of Services offerings (GSAS and Admin On-Demand in particular) | CO | ES, COD, AE, RVP |
| Review deck with customer; make necessary updates | CO | PM, AE |
| Execute EBR meeting:<br>• Review deck<br>• Set target adoption metrics<br>• Schedule Next EBR, 3 months out | CO | ES, COD, AE, RVP |
| Send meeting summary and action-items in follow-up email | CO | PM, AE, RVP |

## Renewal

**Roles Involved:** Client Outcomes Manager, Account Executive, Client Outcomes Director, RVP, Executive Sponsor

**Description:** Process of securing customer renewal

| Task | Owner | Support |
|---|---|---|
| Review contract terms & C360 120 days out | CO, AE | RVP, COD |
| Define renewal strategy and roles & responsibilities | CO, AE | RVP, COD, ES |
| Contact business sponsor to confirm renewal objectives & process | AE | ES, RVP |
| Organize monthly CO:AE syncs, post output to chatter | CO | AE, ES, RVP, COD |
| Review Special Conditions on C360 & Contract before sending to customer | AE | RVP |
| Prepare renewal order form, incorporate YoY price increase if allowable | AE | RVP |
| Preview Renewal Pricing with customer | AE | RVP |
| Send renewal order form via EchoSign | AE | |
| Inform customer that we have to pay SFDC royalties at the 30-day mark | AE | |
| If status is At-Risk or worse, organize weekly syncs with AE, COD, and RVP | CO | AE, COD, RVP |
| If status is Commit or Booked, organize final renewal meeting with AE | CO | AE |
| Confirm customer intent to renew and finalize renewal | AE | |

# Sample Customer Lifecycle: Responsibilities

| Phase | Pre-Sales | Onboard | | Adoption | Grow | |
|---|---|---|---|---|---|---|
| **Stage** | **Sell** | **Welcome** | **Deploy** | **Adopt** | **Renew/Expand** | **Deploy (2)** |
| **Sales (AE, RVP, SDR)** | Drives sales process, identifies key stakeholders, crafts phased roll out plan, documents org chart | Hands off full intelligence and provides warm introduction to post-sales | Remains informed with progress of Onboarding | Remains informed and provides drives commercial relationship; participates in EBRs | Drives expansion plays: shares wins, networks with cross-functional execs | Remains informed of progress |
| **Client Outcomes (COM)** | Supports on closing deals, developing phased approach; executes paid GSAS engagements | Ensures positive relationship with executives | Drives strategic and adoption components of onboarding project plan | Drives adoption plays, identifies and mitigates risk; drives EBRs and GSAS | Supports sales in renewal and expansion plays | Continues to drive strategic thought leadership |
| **Onboarding (PM, SA, IS)** | Scopes roll out, supports sales in preparing phased approach | Crafts project plan and drives day-to-day activities | Ensures project meets goals on time; proactively escalates and mitigates risks; Documents configuration and trains technical resources | Provides knowledge transfer to support; Supports Sales and COM with adoption and expansion plays | Helps facilitate closing of expansion plays; Scopes and delivers project plans for expansion | Ensures subsequent deployments meet goals |
| **Technical Success (Support, CSA)** | N/A | N/A | Introduced as technical resource and ongoing services options; ramps up on technical configuration | Provides technical support to deployed configuration; Delivers AoD and instance reviews as sold | N/A | Helps with knowledge transfer |

# Gainsight Moments of Truth

| Phase | Pre-Sales | Onboard | | Adoption | Grow | |
|---|---|---|---|---|---|---|
| **Stage** | **Initial Sell** | **Welcome** | **Deploy** | **Adopt** | **Renew/Expand** | **Deploy (2)** |
| **Key Activities** | **1.1 Get in the door:** Build relationships, understand needs, ID buyer<br>**1.2 Prove value:**<br>• V3D, demo<br>• Value workshop<br>• EBC<br>• GSAS<br>• GS v. comps v. build<br>**1.3 Prep for close:** SOW prep, data workbook, how to execute<br>**1.4 Pre-close meeting:** Intro post-sales team, document phased approach, org chart, use cases by team, success criteria by phase | **2.1 Internal handoff:** GS team is assigned, welcome email and gift basket to the customer. PM schedules welcome call. Internal handoff.<br>**2.2 Welcome to Gainsight**: Initial customer exec alignment with GS. PM schedules Customer Welcome Calls, CL joy<br>**2.3 Initial exec alignment**<br>**2.4 Kickoff:** project plan, ROI and benchmarking plan, schedule EBRs, success criteria | **3.1 Finalize requirements:** On-site workshop (Data Discovery, strategy session, requirements gathering and sign-off)<br>**3.2 Configure Gainsight:** Weekly update, risk ID, testing, UAT signoff, plan rollout and change mgmt., instance documentation, admin training<br>**3.3 Train and launch:** 3 month plan, change mgmt. comms, training for user/exec/managers, CL joy, TTT, adoption training<br>**3.4 Pre-launch EBR** | **4.1 Deployment:** Phase approach, share EBRs, new use cases<br>**4.2 Adoption:** IVM, office hours, monitor adoption, weekly ops meeting, 'ride-alongs', strategy sessions<br>**4.3 QBRs:** Revisit ROI, value stages, phased rollout<br>**4.4 Events:** Pulse, Pulse Check, networking, Dreamforce<br>**4.5 Advocacy:** Case study, quotes, speaking events<br>**4.6 Exec engagement:** Share ROI, Plan future config.<br>**4.7 Product feedback:** ECAB<br>**4.8 Tech Success:** Instance Review, Support, AoD, CSA | **5.1 Renewal:** Value realization, upsell discussion<br>**5.2 Resell playbook**<br>**5.3 Expansion:** Share EBR output with other execs, customer networking, events | **5.4 Collaboration:** Cross-BU competition, knowledge sharing, best practices<br>**5.5 Expand value:** Data and resource consolidation |
| **Customer Experience & Outcome** | • Gainsight understands my needs<br>• Red carpet sales<br>• Gainsight is superior to the competition: product, talent/professional demeanor, industry leader | • Smooth introduction to post-sales, full knowledge transfer, no need for repetition<br>• Prescriptive, guided, efficient onboarding experience<br>• Visibility to resources and activities | • Feeling in-control<br>• Enthusiasm from GS about Onboarding – momentum continues, still red carpet<br>• Confident in technical integration<br>• Prepped for change mgmt. and adoption | • Gainsight is adding value to my business<br>• Users are better able to serve customers using Gainsight<br>• Gainsight listens to my needs, provides helpful solutions, and makes product enhancements that serve my needs<br>• Gainsight responds to technical inquiries efficiently<br>• I'm continuously learning and evolving thanks to GS | • The rest of the company could strongly benefit from Gainsight<br>• Confident that users will like and see value from Gainsight<br>• Excited to advocate for Gainsight across our other teams<br>• I enjoy advocating for Gainsight | • Excited to get as much value as our other users/groups<br>• Gainsight has learned from past deployments and will be improved going forward |
| **Key Results** | • Deal signed<br>• Deal size, contract length/terms<br>• Sales Survey/NPS | • Hitting deadlines<br>• Implementation Survey/NPS | • Project delivered vs. Scope<br>• Successful, Hype-generating Launch | • IVM, Healthy Habits<br>• New features enabled /used<br>• Successful Executive Engagement contact<br>• NPS | • Contract signed<br>• Deal size, contract length/terms<br>• No red flags during renewal process | • Same as for other deployments |

# Sample Agenda for a ½ Day Customer Journey Session

- Choose the segment (10 min)

- Define the key personas (20 min)

- Align on the customer phases (30 min)

- Brainstorm the customer touch points (no wrong answers, think cross-functionally)
  - ➤ Free form (20 min)
  - ➤ Persona focus (20 min)
  - ➤ Lifecycle focus (20 min)
  - ➤ Functional focus (20 min)

- Discussion of themes (20 min)

- Prioritize touch points (20 min)

# Template: Pre-Close Meeting

**Description:** Pre-close meeting where Sales introduces Client Outcomes and Onboarding team members to provide momentum leading up to contract signing.

**Roles Involved:**
Account Executive, SDR, Solutions Consultant, Client Outcomes Manager, Project Manager, Solutions Architect, RVP, Executive Sponsor, Client Outcomes Director

| Task | Owner | Support |
|------|-------|---------|
|      |       |         |
|      |       |         |
|      |       |         |
|      |       |         |
|      |       |         |
|      |       |         |
|      |       |         |
|      |       |         |

# Template: Internal Handoff

**Description:** Post-Sales team is finalized, Sales provides all requisite information for a smooth handoff, and Project Manager schedules customer welcome call.

| Task | Owner | Support |
|------|-------|---------|
|      |       |         |
|      |       |         |
|      |       |         |
|      |       |         |
|      |       |         |

# Questions?