Customer Success Plan Template

New Customer Kick-off Call:

Prepare for the Call	Collect key customer data such as customer name, email & contact information, and information on plans signed up for by the customer. Identify pertinent information that needs to be communicated to the customer.
Call the Customer	Communicate key objectives with the customer. Detail the onboarding process. Clearly communicate expected goals. Discuss timelines and milestones. Generate a kick-off call document, summarizing the call.
Incorporate Feedback Ideas from Kick-Off Call	Incorporate any customer recommendations that have been agreed to in the kick-off call.

Onboarding - For Free Trials:

Self-Service Sign-Ups	Automate as much of the process as possible. Collect basic information.
Welcome Email	Immediately follow up with a welcome email after sign-up. Provide information to enable trial user to start using the solution, and provide links to tutorials and help forums.
Automate the Process as Much as Possible	Enable customers to experiment with the solution, through automated help & suggestions, without involving human interaction until necessary. Ensure that each decision in the free-trial process is metrics driven. Use these metrics to determine what aspects of the product/usage experience led to a higher conversion rate.
Identify the Customer's Time to First Value	When your free trial user reaches a key milestone in usage, hand-off to sales to convert the free-trial user into a paying customer.
Solicit Feedback	Solicit feedback from trial users that signed up & those that did not.

Onboarding - For Paying Customers:

Record / Verify / Update Customer and Project Information	Verify the correctness of customer information from your CRM solution. Correct / add necessary information. Update customer details, project status, and deliverables.
Welcome Email	Immediately follow up with a welcome email after sign-up. Provide information to enable user to start using the solution, + provide links to tutorials & help.
Set Up a Communications Plan	Set up a plan to regularly communicate with the customer. Ask them for feedback and if their needs are being met. Collect customer insights to target customers with what they're interested in.
Set Up a Support Strategy	Analyze usage data to identify customer potential usage issues. Develop a proactive support strategy.
Check-In With Customers Regularly	Focus on educating the customer. Set up a schedule for communication that allows you to connect often without alienating customers. Leverage your data so that when you get in touch with a customer it's about their specific needs. Ask for feedback or if their needs are being met.

Ongoing Engagement:

Monitor Your Metrics	Track KPIs & key metrics affecting customer health.
Provide Education and Guidance as Necessary	Offer in-app text and voice chat as needed. A high touch approach may be needed for customers if your app has a high learning curve and has numerous and complex features.
Set up QBRs and Annual Reviews	Conduct QBRs regularly and communicate results. Document improvements in the product and/ or process as a result of the QBR & update the profile.
Create Recurring Onboarding Cycles Every Time a Major Feature is Released	Ensure that that customer is onboarded for the new feature, and is able to use it effectively.
Check In With Customers On a Regular Basis	Set up a communications plan to disseminate key information, receive feedback, and identify sponsors.
Coordinate with Other Sales, Support, Marketing and Finance	Monitor and communicate potential churn situations. Identify opportunities for upsell.