

Smarter Customer Success

Need to onboard customers more effectively? Worried about churn? Not sure how to compensate CSMs? We can help:

- Implement a customer success program from scratch.
- Diagnose churn root causes.
- Define customer journey maps.
- Identify opportunities for revenue expansion.
- Increase customer engagement.
- Implement customer success metrics.

Our Process and Deliverables

We can help you set up a brand-new customer success program, or work a la carte:

- **Analyze causes for churn.** We analyze why customers are leaving and why others are increasing their investment. The goal is to create a predictive model so you can target the right customers for additional attention.
- **Define customer segments and offerings.** Headcount-intensive activities are wonderful, but not every customer needs them. We suggest criteria for differential treatment and appropriate offerings for each segment, bringing them together in a consistent customer journey map.
- **Structure the onboarding process.** Onboarding lends itself very well to a repeatable process. We help you identify activities that can be automated or delivered in self-service. We suggest approaches for testing or certifying customers so they are truly ready by the end of onboarding.
- **Define retention processes.** This includes monitoring customers' health, alerting the team when predefined criteria are reached, and specifying automated or personalized actions based on the criteria.
- **Train CSMs.** We can give CSMs tools to better communicate with customers, engage at a strategic level, improve their presentations skills, and collaborate effectively with other groups in the company.
- **Implement tracking tools.** Customer success activities and customer data need tracking. We suggest solutions appropriate for your needs.

- **Create customer scorecards.** Scorecards are useful for individual CSMs and customers, as well as the larger organization. They are most effective when they combine multiple data points, yet need to remain streamlined to be most useful. We help define what to include in scorecards, how best to present the information, and how to use the scorecards with customers and internal players.

We can both create recommendations for you to implement, or provide assistance during the implementation.

About FT Works

FT Works helps technology companies set up and improve customer support and customer success.

- Because our only focus is support we master **industry best practices** for customer success with segments and products similar to yours.
- We work on all aspects of customer success so we bring a **holistic view** to defining offerings and processes.
- We have a knack to work with all the stakeholders inside and outside the customer success team so we can **build consensus for changes**.
- We have plenty of experience so we can **deliver results quickly**.
- We have no allegiance to any particular group so we can provide your team with **unbiased recommendations**.
- As a boutique firm we rely on a **flexible, targeted approach** that maximizes your return on investment.

For more information about process streamlining, please contact info@ftworks.com or 650 559 9826.