



WEBCAST SERIES

The Digital Customer Experience is Reinventing the Brand

Nov 12, 2015

2:00 pm ET / 11:00 am PT

Welcome!



Featured Speakers



Kristen Yerardi
VP, Customer
Success



Gary Sarkesian
VP, Customer
Success & Account
Management



CEMDNA Playbook StrategySM





 **WordStream**
Online Advertising Made Easy

Building Customers for Life The Digital Customer Experience is Reinventing the Brand

Kristen Yerardi

11.12.2015

Welcome

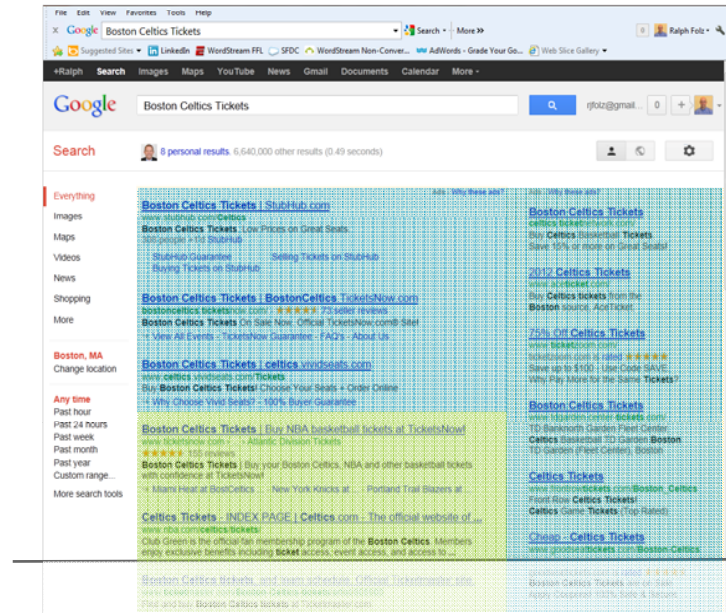
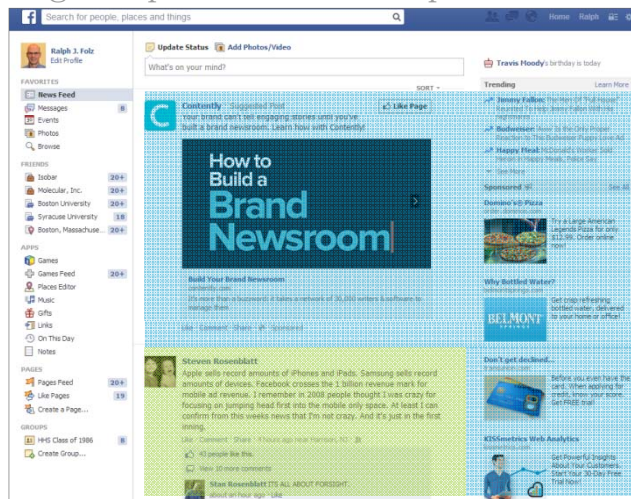
- WordStream in a nutshell
- How have we changed from company first to customer first engagement?
- Where are we today?
- Do customers like it?

The Giant In-Bound Marketing Squeeze

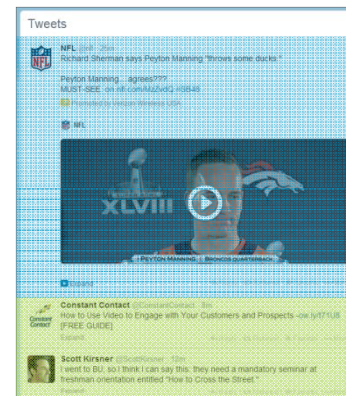
Good-bye Free Clicks



- Platforms aggressively monetizing
- Looming Wall Street Expectations: GOOG, TWTR, MFST, FB
- Big companies can adapt.



FOLD



ADS

CONTENT

SMBs Are Not Ready

Complicated Platforms

1,000 new AdWords innovations in 2013

Campaigns, AdGroups, Ad Copy, Landing Pages

Campaign	Budget	Status
Total - all campaigns	\$195.00/day	
KRS	\$20.00/day	Paused
Keyword	\$50.00/day	Paused
Quality Score	\$20.00/day	Eligible
Remarketing	\$25.00/day	Limited by budget
Long Tail	\$10.00/day	Limited by budget
AdWords Grader	\$30.00/day	Limited by budget

Clicks	Impr.	CTR	Avg. CPC
18,732	4,199,238	0.45%	\$1.81
5,656	828,278	0.68%	\$2.17
1,657	551,311	0.30%	\$2.27
400	121,204	0.33%	\$2.06
203	43,993	0.46%	\$1.48
180	36,612	0.49%	\$3.08
99	25,651	0.39%	\$1.55

CTR, Positions, Rankings, Quality Scores

Ad	Campaign
Total - all ads	
Is PPC Driving You Crazy? Alleviate Your Headache & Get Expert Results - Quickly! wordstream.com/adwords-agency	Agency (Mgmt)
Find Keywords for Free Get Actionable Keyword Data with the Free Keyword Tool. Start Today! WordStream.com/free-keyword-tool	Keyword
Keyword Research Suite! Leverage WordStream's One Trillion Keywords for Your SEO Research! www.WordStream.com/Keywords	KRS

Networks, Devices, Geo-Targeting, Day Parting



"I tried it before and it didn't work for me."

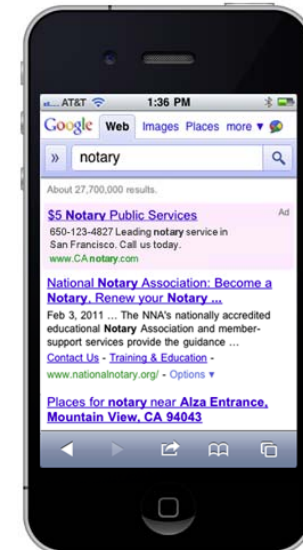
Landing Pages

Can't easily create - losing out on conversions



Growth in Mobile

Mobile overtakes desktop in 2015



"I just want leads & customers."

WordStream Quick Snapshot

- Customer Acquisition in 20 Minutes Per Week
 - Paid search media platform focused on helping customers optimize their accounts
- SaaS offering targeting small to medium businesses (SMBs)
- Founded by Larry Kim in 2008
- 105 Employees, One Location: Boston Massachusetts
- \$25M raised. Investors: Sigma Partners, Baird Capital, Egan Managed Capital

2010 – What were we doing?

- Onboarding consisted of one 1-hour call with a series of emailed PDFs
- Ongoing support utilized only email and phone was discouraged
- No chat function or webinars
- No online training materials, only product documentation



Realize Where You're Falling Down

- Because SMBs struggle with paid search we realized that many needed help even learning the basics
- Customers were failing because they weren't getting the guidance and help they needed. They didn't know what to do.
- Without prescriptive help, we were sending our clients up the creek without a paddle. UGH! Horrible!



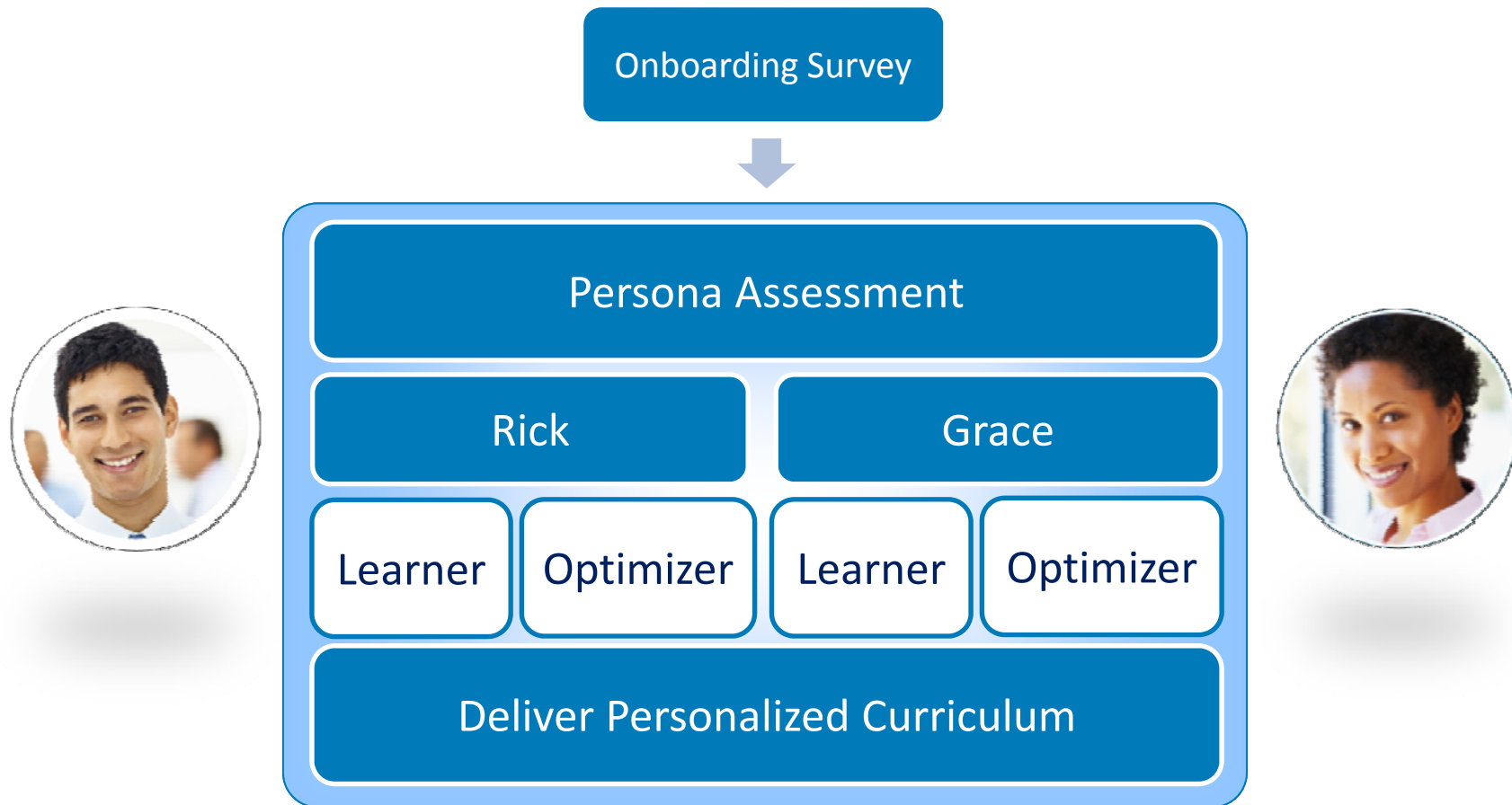
Create a Customer Success Mission

WordStream's CS Mission:

- Drive the highest possible retention through exceptional support and service while delivering PPC insights and assistance to help businesses be successful with PPC



What We Do Today



Online Training Curriculum & Onboarding Video

WordStream
Online Advertising Made Easy

Additional Services | Blog | Login

Your Personalized Training Curriculum

John,
Your WordStream Trainer
john@wordstream.com
322.233.3322

expand ▼

Your Strategic Goal: **Eliminate Wasted Spend**

PPC Training	WordStream Training	Strategies for Eliminating Wasted Spend	Success Tracking
 2 of 4 CONTINUE LEARNING	 2 of 4 CONTINUE LEARNING	 1 of 2 CONTINUE LEARNING	 0 of 6 START LEARNING

Supplemental Materials

- How to configure your account
- Message from CEO (Video)

Upcoming Webinars

Monday, November 6

- 10:30AM | Become a WordStream Pro in 45 minutes | register
- 12:30PM | Become a PPC Pro in 45 minutes | register

Wednesday, November 8

- 10:30AM | Become a WordStream Pro in 45 minutes | register
- 12:30PM | Become a PPC Pro in 45 minutes | register

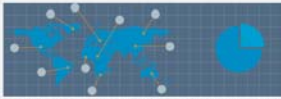
Friday, November 10

- 10:30AM | Become a WordStream Pro in 45 minutes | register
- 12:30PM | Become a PPC Pro in 45 minutes | register

Featured Webinar

10 Ways To Outsmart Your PPC Competition

Tuesday, November 6, 2014 10:30AM | register



Lorem ipsum dolor sit amet, consectetur adipiscing elit. Etiam scelerisque justo vitae orci aliquam molestie. Quisque orci ipsum dolor sit amet, consectetur adipiscing elit. Etiam scelerisque justo vitae orci aliquam molestie. Quisque

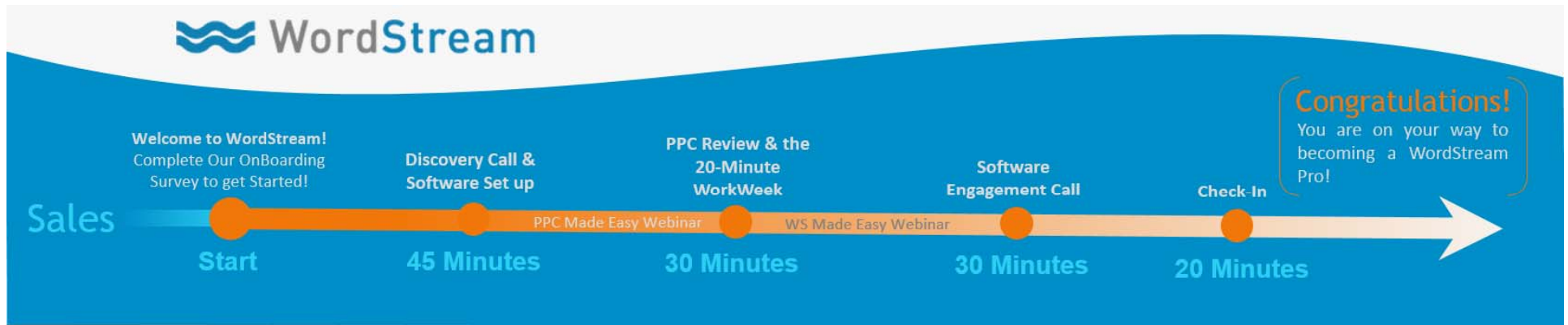
WordStream Confidential



Welcome to WordStream!

<https://wordstream.wistia.com/medias/6p42y9n2vt>

Thorough Training Process



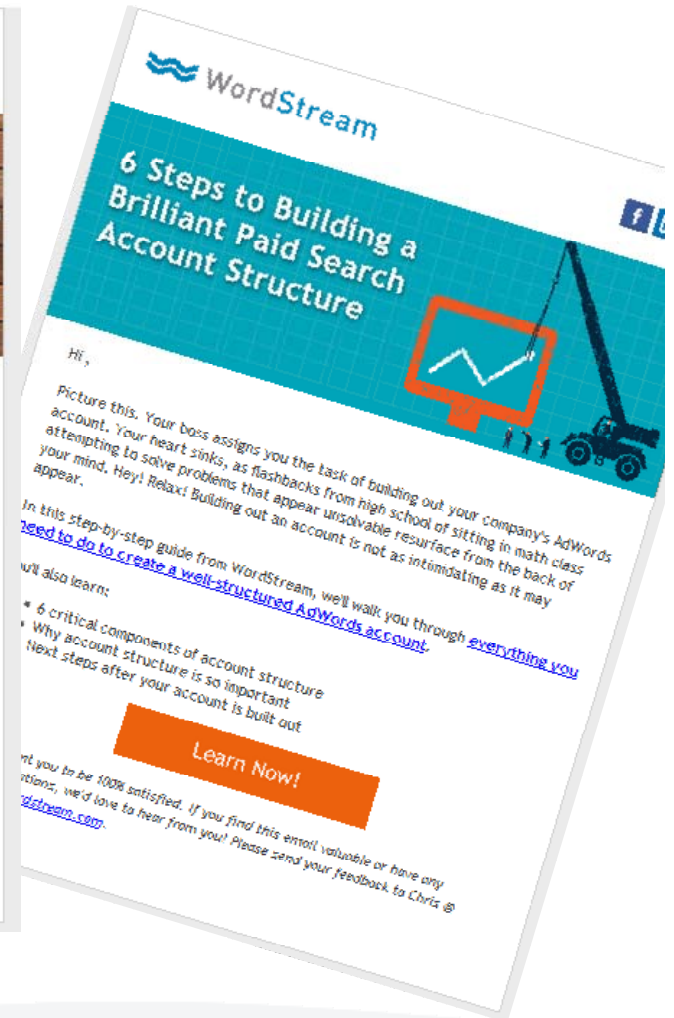
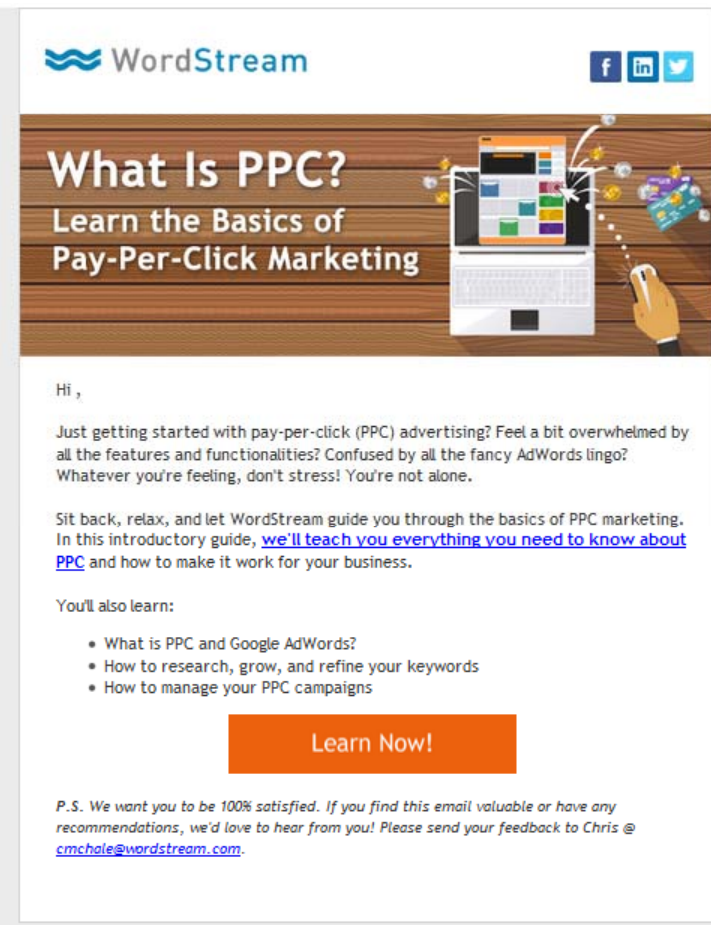
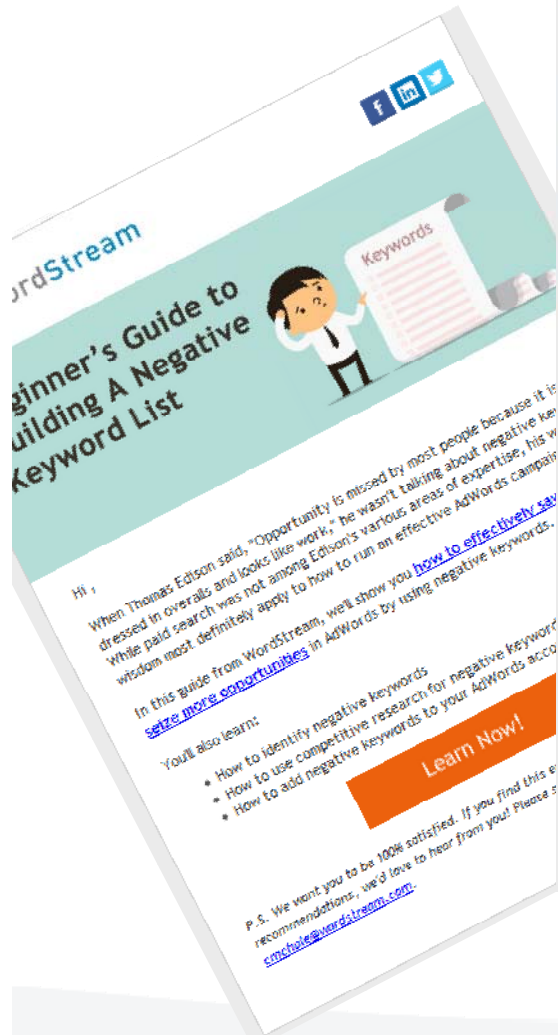
WordStream Onboarding and Training Timeline

 <p>Training Portal & Webinars</p> <p>Throughout your time with WordStream, you will have access to a personal training portal to track your progress and find additional guidance. You will also have access to exclusive customer webinars, held daily.</p>	 <p>One on One Training</p> <p>During your training calls, you will have the Opportunity to work with a software & PPC expert in your account to get fully up to speed with PPC Best Practices, WordStream Advisor, and all it has to offer!</p>	 <p>Want to add Premier Consulting?</p> <p>With this additional service, you will schedule monthly calls with your rep to work 1-on-1 to discuss PPC strategy and gain customized insights specific to your account goals. Give us a call at +1-617-849-6116</p>
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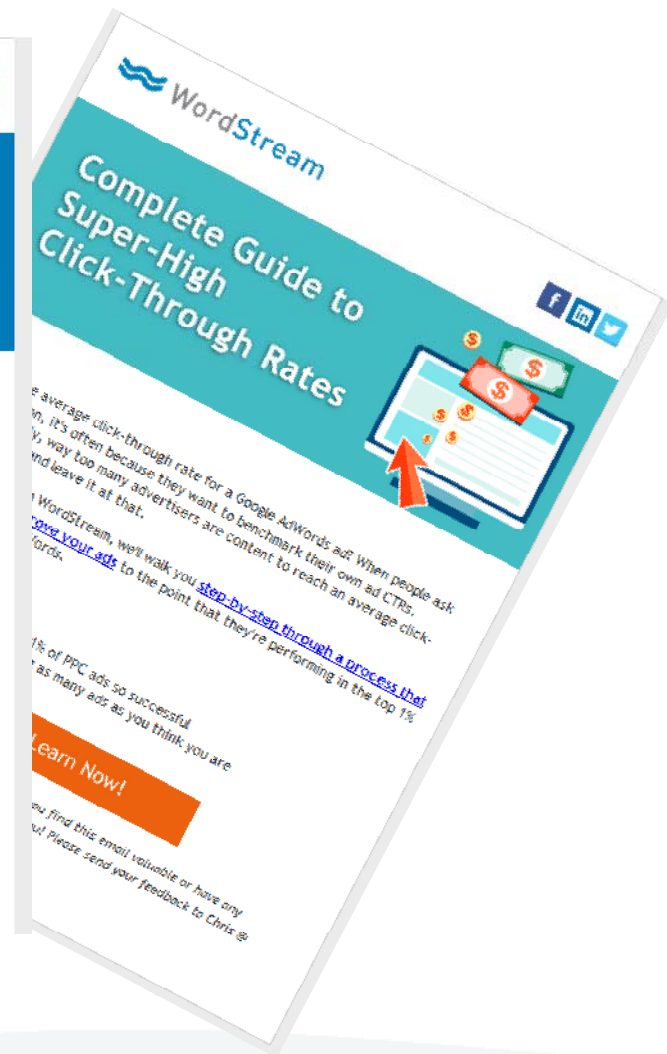
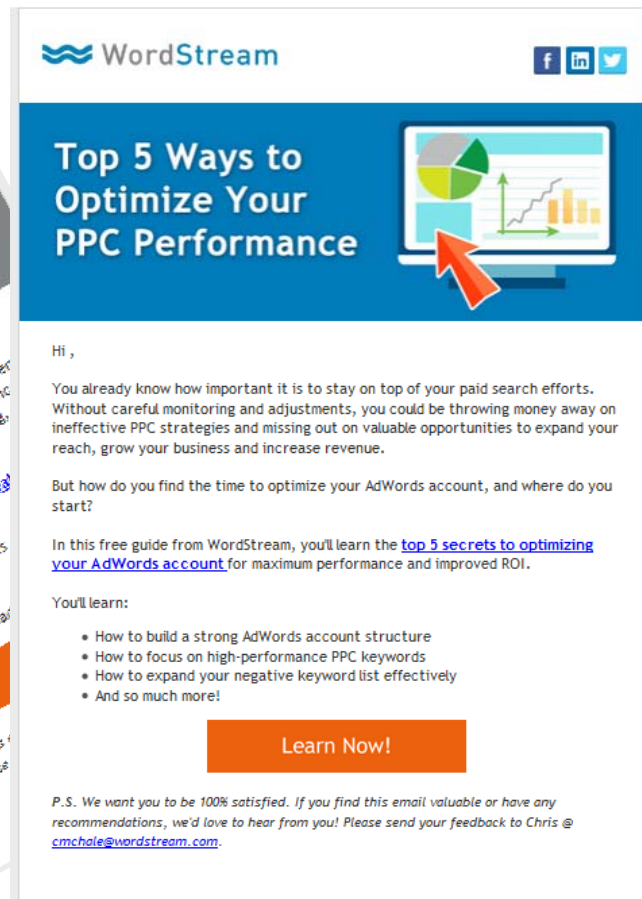


Customer Nurture Programs

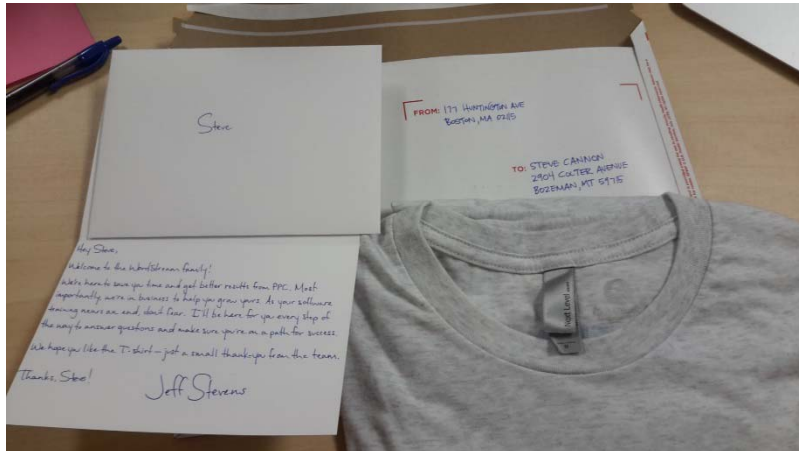
On Boarding Nurture – Learner Path



On Boarding Nurture – Optimizer Path



Swag



Chris McHale retweeted



BleepBleeps @BleepBleeps · Jul 31

So nice when people send you free stuff. Happy to be a #wordstreamer @wordstream thanks @jchilds537



WordStream Confidential



Bansi Pathak @bansipathak · Jul 9

RT KevinSCooke: Clickin' Ads and Taking Names! Thanks for the swag WordStream #wordstreamer via larrykim



View photo

Chris McHale retweeted



Alexis Irias @lexirias · Jul 27

What a pleasant surprise! Thank you @wordstream! We're pleased to be working with you! @inNuevoDigital



 **WordStream**

18

Industry Nurture



CHECK IT OUT!

25 Restaurant Marketing Ideas: Tips & Strategies to Win In The Food Business




Hi Chris,

Keeping up with AdWords can be a full-time job in itself, let alone figuring out how to overcome the challenges of using AdWords for the **food and beverage industry**.

We thought we'd [send you this article](#) from the WordStream blog that will help you focus on the techniques that are most relevant to your industry.

Hope you enjoy the article!

Is there something you'd like to see us cover on the WordStream blog? Send a note to [Chris @ WordStream](#).

Connect With Us:   



Customer Marketing

Customer Spotlight

WordStream CUSTOMER SPOTLIGHT

4 Ways Buhv Designs Improved Their PPC Life with WordStream

Welcome [Buhv Designs](#) to the WordStream Customer Spotlight!

Buhv Designs offers a variety of services focusing on digital marketing offerings for small and medium-sized businesses. "Our team is focused on helping businesses own their markets through local SEO, paid search, content marketing, and clean & elegant design," says Robert Lane, Partner and Owner of Buhv Designs. "We have been adding new services like crazy over the past 18 months, and we consider ourselves an 'end-to-end digital marketing agency.'"



This might seem like a dream come true, but it's clear that Buhv Designs faces two major challenges. The first is being a startup with limited bandwidth and resources, and the second is being an agency in itself.

[Read on](#) to hear their story...

[Read Full Spotlight](#)

Have a paid search success story to share? Step into the Customer Spotlight! [Contact us](#) today to get your business featured in our series.

WordStream CUSTOMER SPOTLIGHT

Fasten Your Seat Belt! Seatbeltplanet.com Shares 5 PPC Strategies Used to Improve ROI and Increase Efficiency

Welcome [Seatbeltplanet.com](#) to the WordStream Customer Spotlight!

As a seven-person operation, Seatbeltplanet.com employees are tasked with juggling multiple responsibilities to ensure the prosperity of the business.

Jason Neill, the Operations Manager at Seatbeltplanet.com, oversees all of the company's marketing efforts, and with his bandwidth stretched thin, Jason turned to WordStream to help with their paid search marketing.



If you want to get more out of your paid search campaigns without putting in more hours, check out this Customer Spotlight. Jason from Seatbeltplanet.com shares 5 PPC strategies he used to help improve ROI and increase efficiency.

[Read on](#) to hear their story...

[Read Full Spotlight](#)





Have a paid search success story to share? Step into the Customer Spotlight! [Contact your Customer Success Rep](#) today to get your business featured in our series.

Customer Spotlight


- Customers reach out to me monthly to participate in the Customer Spotlights
- Sales team can use to send to prospects
- Website page coming soon



Monthly Newsletters



What's New @ WordStream?



July 2015

NEW FEATURES

We Now Support Upgraded URLs

Ads, keywords, sitelinks, and placements all now use upgraded URLs. Google has replaced the Destination URL field with the field, [Final URL](#). You can think of the Final URL as the landing page. There is also a new field for URL [Tracking Templates](#). Tracking Templates can be defined at the Account, Campaign, Ad Group, or Ad level. This is beneficial for setting up call tracking for an entire account. [Check it out >](#)

We Now Support Callout Extensions

Callout extensions can be found in the "[Show Me More](#)" menu in Manage PPC. Define new Callouts in the Library area then associate the Callouts to individual Campaigns or Ad Groups. By default Campaigns and Ad groups inherit Callouts associated at a higher level. [Check it out >](#)

[Log In to WordStream](#)[Ask a Question](#)

UPCOMING EVENTS

[Live Webinar] The #1 Trick to Get the Click: Learn How to Write Great PPC Ads In 30 Minutes

Writing ad copy for PPC can be tough, especially when you only have 25 characters in the headline to capture your audience's attention. The good news is you don't have to be a professional copywriter to whip up persuasive, compelling ad text that prospects can't resist clicking.

In our next customer-exclusive webinar, WordStream's founder and CTO Larry Kim will walk you through a 30-minute exercise that will help you improve your PPC copywriting skills immediately. You'll learn:

- How to identify your business' differentiating characteristic
- How to write a killer call-to-action
- And much more!

[Register Now](#)

Daily WordStream Webinars

The Customer Success team here at WordStream host daily training webinars exclusive for WordStream customers only. These webinars will help you as a customer utilize WordStream Advisor to the fullest as well as keep you up-to-date on PPC best practices.

To sign-up for a daily webinar, please click on the link(s) below and complete the short form.

[Monday: WordStream Made Easy](#)

[Tuesday: PPC Made Easy](#)

[Wednesday: WordStream Made Easy](#)

[Thursday: PPC Made Easy](#)

[Friday: WordStream Made Easy](#)

Get Involved

Here at WordStream, our philosophy is to let you, the client drive feedback for product development. As we work on exciting new initiatives, we would love to hear your feedback on them! Sign up for our Beta Testing Program today.

[Sign Up Now](#)

FREE RESOURCES

Live Webinars



7 PPC Shortcuts to Simplify Your Life & Save Time

Exclusive Customer Webinar
4/23/15 - 11AM ET



There are thousands of features in Google AdWords - so many that it is difficult to know most of them, let alone successfully use all of them. You could spend 60 hours a week for the rest of your life learning AdWords, but who has time for that?

In our next exclusive customer webinar, paid search expert Jeff Stevens will walk you through [7 PPC shortcuts to simplify your life and save time](#).

These shortcuts will separate the must-haves from the nice-to-haves, and provide you with the knowledge you need to get superior results without burning the midnight oil. You'll learn:

- How to create winning landing pages for your ad groups
- What the magic number of keywords you should target is
- Best practices to use bid manipulation effectively
- How WordStream Advisor can simplify these shortcuts even more!

Register Now!



Super Easy Ways to Fix The Most Common PPC Red Flags

Exclusive Customer Webinar - 3/12/15 - 1PM ET





Whether you've just started creating campaigns in AdWords or have a well-established PPC account, let's face it...mistakes still happen. These "red flags" often result in lower ROI, more wasted ad spend, and poor Quality Scores.


In our next [exclusive customer webinar](#), WordStream paid search experts will share the most common account-level red flags they see from clients, and show you how to fix them - fast! You'll learn:

- Which Google-recommended network setting might actually be hurting your account
- How to trim costs with negatives and keyword match types
- Which metrics we monitor for account success
- How to use WordStream PPC Advisor to combat these common pitfalls!

Register Now!

Product Announcements



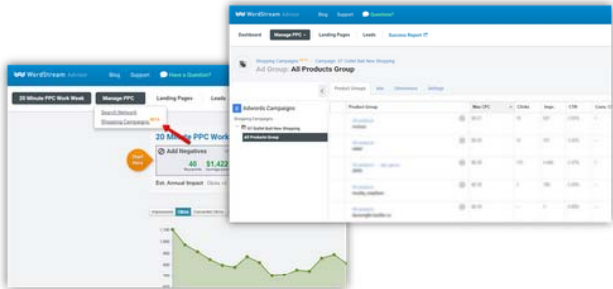


New!

Shopping Campaigns BETA

We're happy to announce that we now support AdWord's Shopping Campaigns directly within WordStream Advisor.

Shopping Campaigns^{BETA} is a great complement to our current offering which primarily focuses on search campaigns. Shopping Campaigns provides full management capabilities such as creating campaigns, ad groups, product groups as well as setting bids on product groups.



As we continue to improve Shopping Campaigns within WordStream Advisor during the beta period, we would love to hear your feedback on how you would like to see shopping evolve. Click [here](#) to let us know what you think!

[Watch Training Video](#)

Hi Chris,

I noticed you're an active user of **WordStream's Call Tracking software**, and I wanted to let you know about an exciting new feature I think you could benefit from.

As you may know, our 20 Minute PPC Work Week dashboard provides smarter recommendations when conversion tracking is set up. Many advertisers don't turn on conversion tracking is because most of their conversions come from phone calls instead of online form submissions.

Sound familiar? If so, you're going to love our brand-new feature: "**call conversions**". With this new feature...

- **Dictate** which phone calls should be counted as conversions.
- **Group** your call conversions with any other conversion tracking you may have in place.
- **Get** the bigger-picture view of how your offline conversions factor into your overall performance and a better idea of how your campaigns are driving phone calls.
- **Inform** WordStream's 20 Minute PPC Work Week to make recommendations about bids, negative and costly keywords etc., based on what drove the phone calls you receive.



[Click here to see how it works and how to get set up quickly and easily.](#)

Thanks!

Chris McHale

Customer Marketing Manager | WordStream
177 Huntington Avenue | Boston, MA 02115

P.S. If you don't take advantage of the new functionality, don't worry! Your Call Tracking will continue to work as normal and you don't need to make any changes.

AdWords Announcements

From: WordStream Support <support@wordstream.com>
Reply-to: support@wordstream.com
To:
Subject: Changes to AdWords

Hi ,

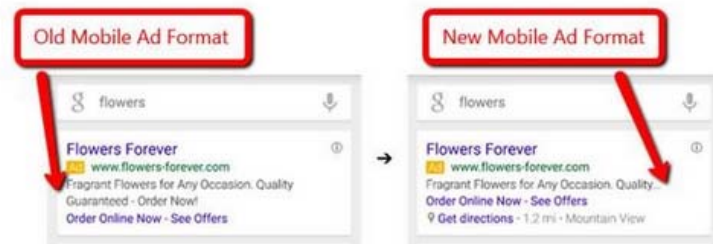
Have you ever noticed that Google loves experimenting with different ad variations on their search engine result pages (SERP)? Usually these tests are impromptu and short-lived, but Google recently announced a new mobile ad format that is here to stay. Here are the details you need to know to help you stay ahead of the curve...

What's changing?

Starting this week, Google's mobile SERPS will display ads in which ad extensions are substituted in the place of the second line of ad text.

Don't worry, Google won't be scrapping their standard mobile text ad format completely as both versions will be served for the time being.

Note: For advertisers not using extensions (or whose extensions are not expected to have positive performance), Google may still eliminate the second line of their ad without adding anything in its place.



Why the switch?

Google claims it's all about optimizing the audience's experience on the SERP. By eliminating the second line of ad text, they can swap in an extension, which gives the user easier access to more information about the business.

So, as PPC advertisers, what should we be doing?

There are a few easy steps we can take to mitigate the impact of this change and ensure it works to our benefit. Here are a few action items:

- **Be sure that the title/line 1 of your text ad makes sense on its own:** Your most important,



Customer Reviews

Customer Reviews - Request



Tue 7/14/2015 10:48 AM

Chris McHale [WordStream] <cmchale@wordstream.com>

WordStream review

To ☐ Chris McHale

Click here to download pictures. To help protect your privacy, Outlook prevented automatic download of some pictures in this message.

[Bing Maps](#)

[Unsubscribe](#)

[Action Items](#)

Hey Chris,

My name's Chris McHale - I'm the Customer Marketing Manager here at WordStream.

I was reading through responses from our customer satisfaction survey and your feedback caught my eye. It's extremely rewarding when customers tell us that we're helping them grow their businesses.

Would you consider sharing your experience by posting a review for WordStream? In addition to providing feedback, your online review will help our customers (and future customers) learn about who we are and how we can help.

[Click here to write review](#)

I really appreciate your help. Please let me know if you have any questions, or if there's anything I can do to make your WordStream experience *even better*.

- Chris

P.S. Your time is valuable and I'm sure you're super busy. As a thank you, I'll send you a \$30 Amazon gift card for submitting a review. Thanks!

Chris McHale | Customer Marketing Manager

WordStream, Inc | 177 Huntington Avenue | Boston, MA 02115

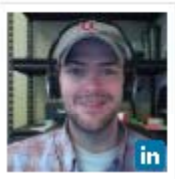
cmchale@wordstream.com

Customer Reviews - Response



Updated On July 21, 2015

Improved PPC Management Efficiency and Improved Results For Clients



Updated On June 4, 2015

✓ Validated Review 📷 Verified Current User

Wordstream was solely responsible for expanding our business into PPC



Updated On May 19, 2015

✓ Validated Review 📷 Verified Current User

WordStream Makes Adwords Work For You!



Updated On May 12, 2015

✓ Validated Review 📷 Verified Current User

Great Tool. Excellent Customer Service.



Updated On May 4, 2015

✓ Validated Review 📷 Verified Current User

Outstanding product and service



Stats

A large, solid blue arrow pointing horizontally to the right. The arrow is centered vertically and spans most of the width of the image. The word "Stats" is written in white, sans-serif font inside the left portion of the arrow's shaft.

Email Stats

Email	Average Open %	Average Click To Open %
Customer Spotlights	31%	11%
Monthly Newsletters	35%	10%
On Boarding Nurture	57%	24%
Industry Nurture	52%	56%

Monthly Live Webinars

- Average registration: 250 people
- Average attendees: 100 people
- Average reg to attend rate: 40%

What customers are saying:

“Thanks, these webinars are soooo good! Keep them coming! Jeff did spectacular work.” –Ville Ekman

“Love your webinars and this presenter did a very good job!” - Marti Rowan

“Very interesting. Thank you!” – Jeannie Fiesta

“great webinar!” – Jared Broussard

“That was really great!” – Mark Ryan

“Thank you for a really informative webinar” - H Bondar,

thank you!

Questions?



cvent

The Digital Customer Experience is Reinventing the Brand

Gary Sarkesian

Cvent at a Glance

Founded

1999

Employees

1,730+

HQ

Tysons Corner, VA
(D.C. Metro Area)

Network

14,000+ Customers
200,000+ Suppliers

FY14 Revenues

~ \$145M

Technology

Single-instance, multi-tenant
SaaS Architecture

Over 14k Customers – Leader on Both Sides of Ecosystem

Event

4 of 5 Top Aerospace & Defense Cos.
7 of 14 Top Technology Companies
4 of 5 Top Pharmaceutical Companies
6 of 10 Top Healthcare Insurance Firms
4 of 4 Top Accounting Firms
4 of 5 Top Credit Card Companies
3 of 6 Top Life Insurance Companies

Hospitality

10 of 10 Top Hotel Chains
10 of 10 Top Luxury Hotel Brands
3 of 3 Top Venue Selection Companies
24 of 25 Top Meeting Management Cos.
4 of 5 Top Travel Management Cos.

\$7 Billion Total Addressable Market

\$565B Global Spend on Meetings and Events



Hospitality



Corporate Buyers

\$27B

Manual Processes and
Software for Event
Management

\$5B

Event Management
Software

TAM

\$103B

Meeting Spend
on Hotels

\$4B

Hotel Group
Marketing

\$2B

Online
Marketing

TAM

Source: Frost & Sullivan estimates for Event Management Software in 2012 and Cvent Estimates for Online Marketing
Note: \$565B spent on events and meetings in 2012 includes accommodations, transportation, and other support

Dilemma

Companies Have Fallen Behind In Tapping Into Digital Networks

So People Have Moved...

- Mobile
 - Social
 - New Digital Channels
- Approximately 1 Billion “Digital Natives” Have Migrated In the Last 3 Years
 - Traditional Marketing Increasingly Won’t Reach Them



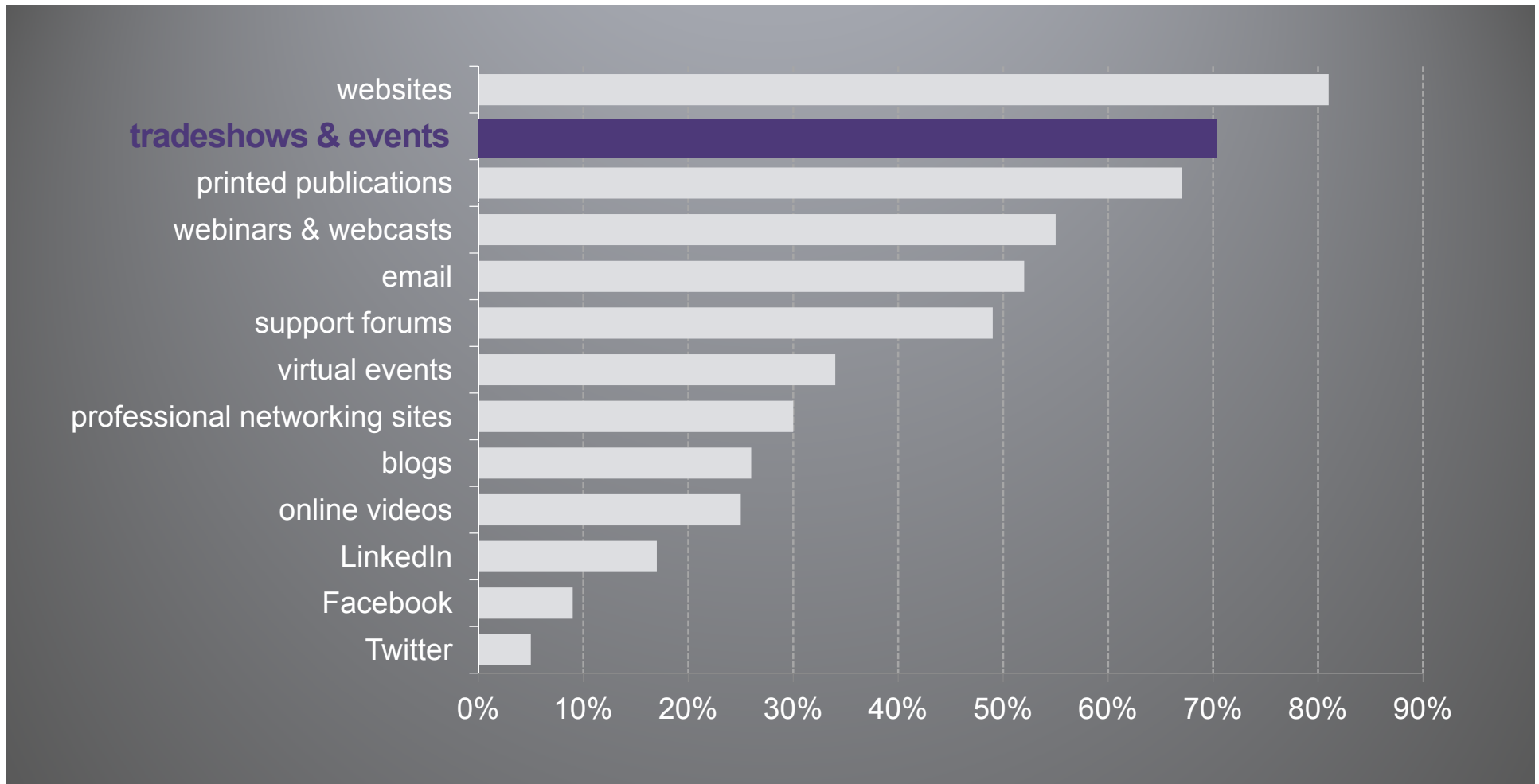
Disruptors

Most apps today are very transactional, but customers want the whole experience to be on their phone.

Disruptors:

- ✓ *The more we want to be connected the more we want to connect – The Human Experience Intensified*
 - Regardless of how powerful and impressive your customer-facing front end is, your employees are the most significant factor in determining the customer experience.
 - *Gamification: a tool helping employees deliver a better customer experience*
- ✓ *Companies are onboard customers at a fraction of the cost of traditional methods*
 - Number26 onboard customers in 6 minutes
- ✓ *Think about your experiences:*
 - We can move money
 - We cannot use a service, raise a request, get advice, alert you, etc.
 - See the gap?
- ✓ *What do customers want?*
 - Full control
 - Personalized service and advice
 - Understanding and immediacy
 - Awareness accountability

After a company's website, *tradeshows & events* are the most effective B2B marketing initiative



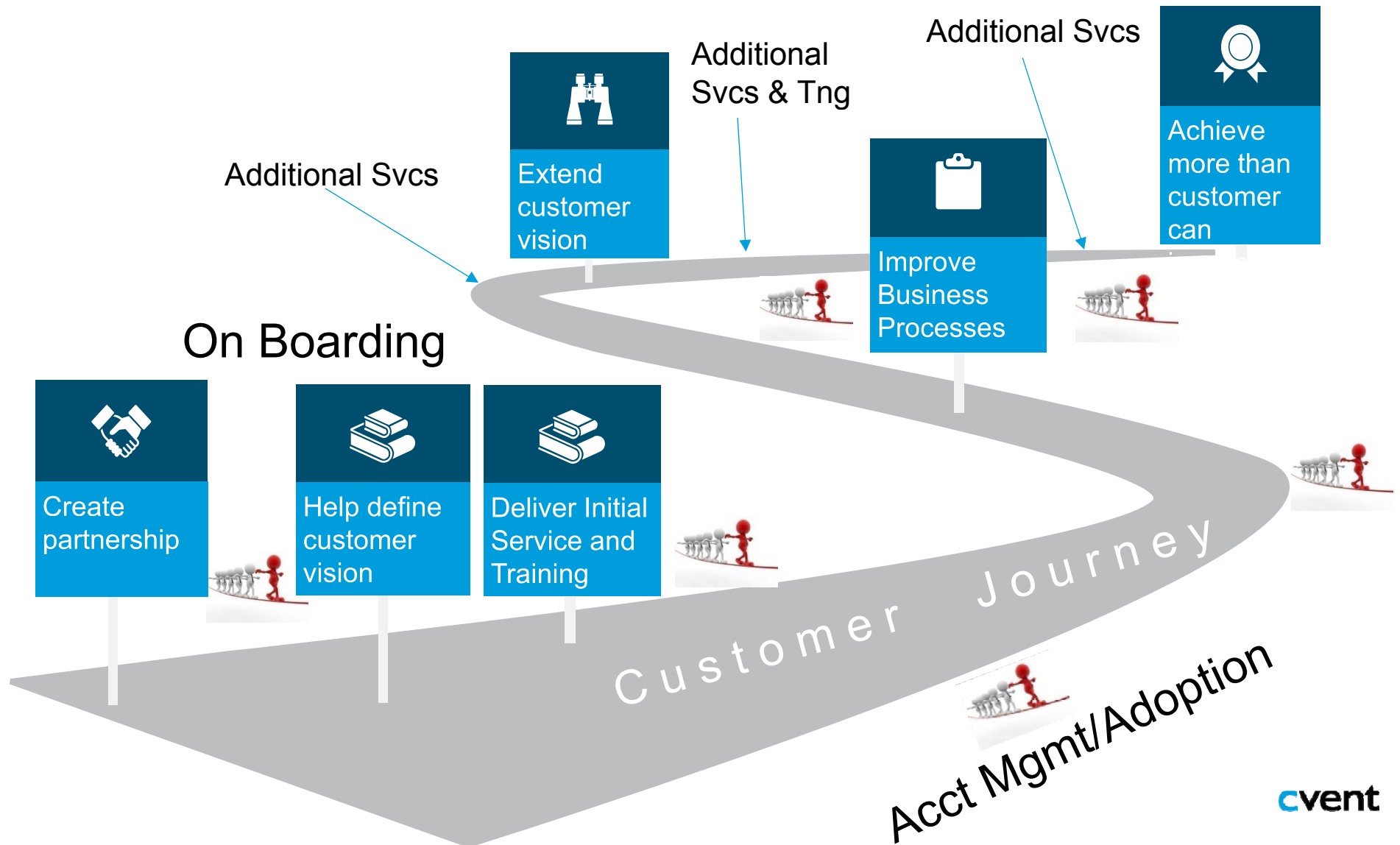
Source: Forrester Research, Inc.

The Right Engagement

Engage the right community for the purpose of innovation.



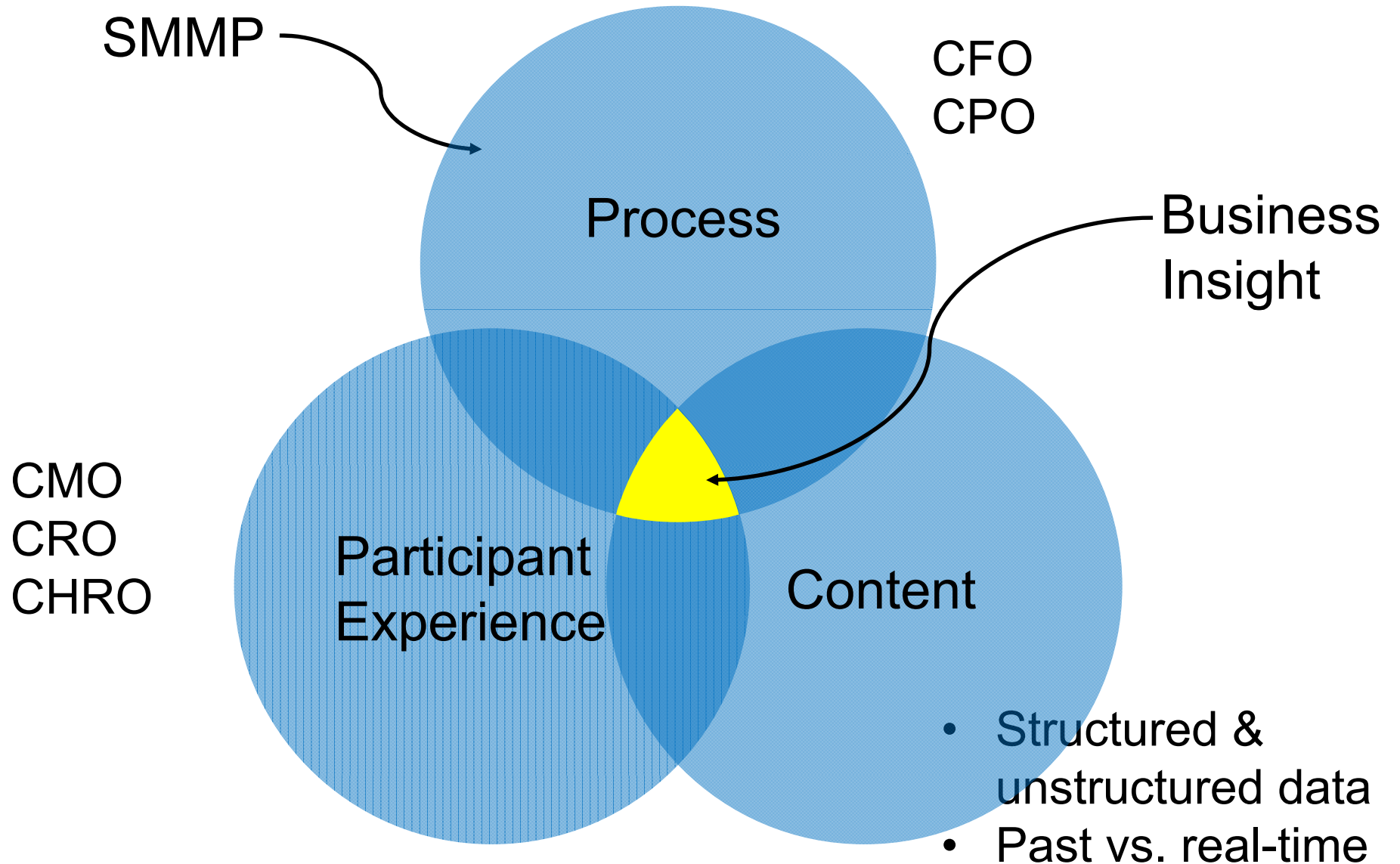
Customer Journey – Key Milestones



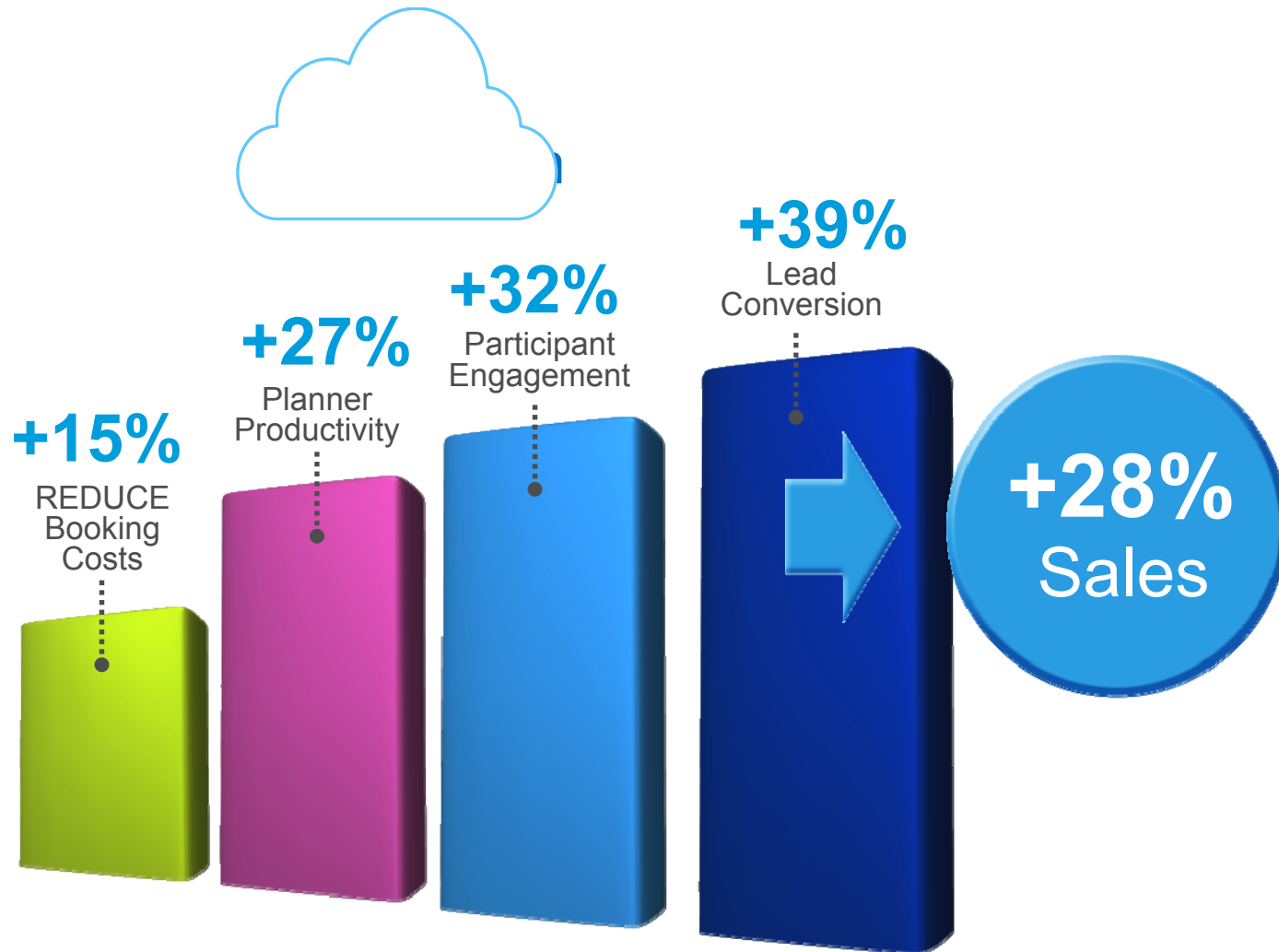
The Event Journey



“The Event Effect”



The *Event Effect* Drives Every Major Metric



Average Percentage Improvements Reported by Customers

Source: Cvent Customer Relationship Survey conducted March 2013, by an independent third-party, Confirmit Inc., on 5,200+ customers randomly selected. Response sizes per question vary.

Renewals Timeline and Engagement



Proactive Monitoring

> 12 Months to Renewal

- Manage overall customer health
- Develop/review business value metrics with key sponsors
- Chatter on renewal opportunity
- Leverage AT RISK Account

- Work closely with customer to identify any potential risk to renewal
- Create AT RISK account or prescriptive action when risk is identified

Update renewal opportunity and forecast

T-200 Acct. Review (CSR)

6 Months to Renewal

- Actively participate in T-200 Acct. Review (CSR).
- If needed, enter and manage AT RISK Account based on risk level
- If identified as Risk Plan owner, drive actions and scheduling future check-in calls

- Actively participate in T-12 Account Review
- Assess current state of contract; participate in contract review
- If identified as Risk Plan owner, drive actions and scheduling future check-in calls

- Review customer account and summarize contract terms and renewal products and update forecast
- Initiate T-12 review with Account Team to drive action on at risk renewals; AM documents collaborative discussion and agreement of risk mitigation plan

Mobilize & Strategize (Renewal Discussion)

180 Days

- Assist with any plays from the playbook (Adoption, Blueprint, CHI, etc.) as appropriate.
- Manage AT RISK Account based on progress against plays (as needed)

- For the largest renewals and for Top accounts; lead the renewal conversation with the CS and Engineering in supporting role
- If identified as Risk Plan owner, drive actions and future check-in calls

- Review all renewal details
- Determine customer-facing renewal lead, agree upon renewal strategy, and mobilize extended team as needed
- Leads the renewal conversation (AM to 'lead')
- Confirms risk assessment and determine appropriate play

Negotiation

90 Days to Contract End date

- Execution of mutual close plan
- Update AT RISK Account based on progress against close plan

- Identify all add-on and upgrade opportunities; ensure incremental ACV is accurately forecasted
- Escalation point for AT RISK accounts and difficult negotiations

- Engage customer, establish mutual plan to close, negotiate and close renewal
- Leverage renewal plays as needed based on risk assessment
- Own renewal opportunity record and renewal ACV forecast, and includes in weekly 90-day rolling forecast submission

Post Renewal

- If attrition or reduction, agree on Reasons for Loss (root cause)
- Mitigate risk for subsequent renewal

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- Identify add-on opportunities to re-build ACV

- If attrition or reduction, agree on Reasons for Loss (root cause)
- Mitigate risk for subsequent renewal

Account
Mgmt/CS/
Engineering
TEAMS

Playbook – Renewals Plays

renewals plays

1

Economic

Reduction in
Force
Cost Cutting
Flexibility
Requirement



2

Adoption

Unused
Registrants
Product no
longer
matches
needs
Low TLP



3

Political

Management
Change
Mergers &
Acquisitions
Lack of
Sponsor



4

Competitive

Price Driven
Functionality
Driven
Culture Driven



5

Price

Multi year
ramp
Analyst
Influence
Transfer to
Reseller



6

Oversold

License
Transfer
Sold wrong
product



7

Renewal

Positive
Réponse to
Renewal
Conversation



Beyond The Renewal Event

How do AMs and CS collaborate after the renewal to mitigate future risk and accurately capture reasons for loss?

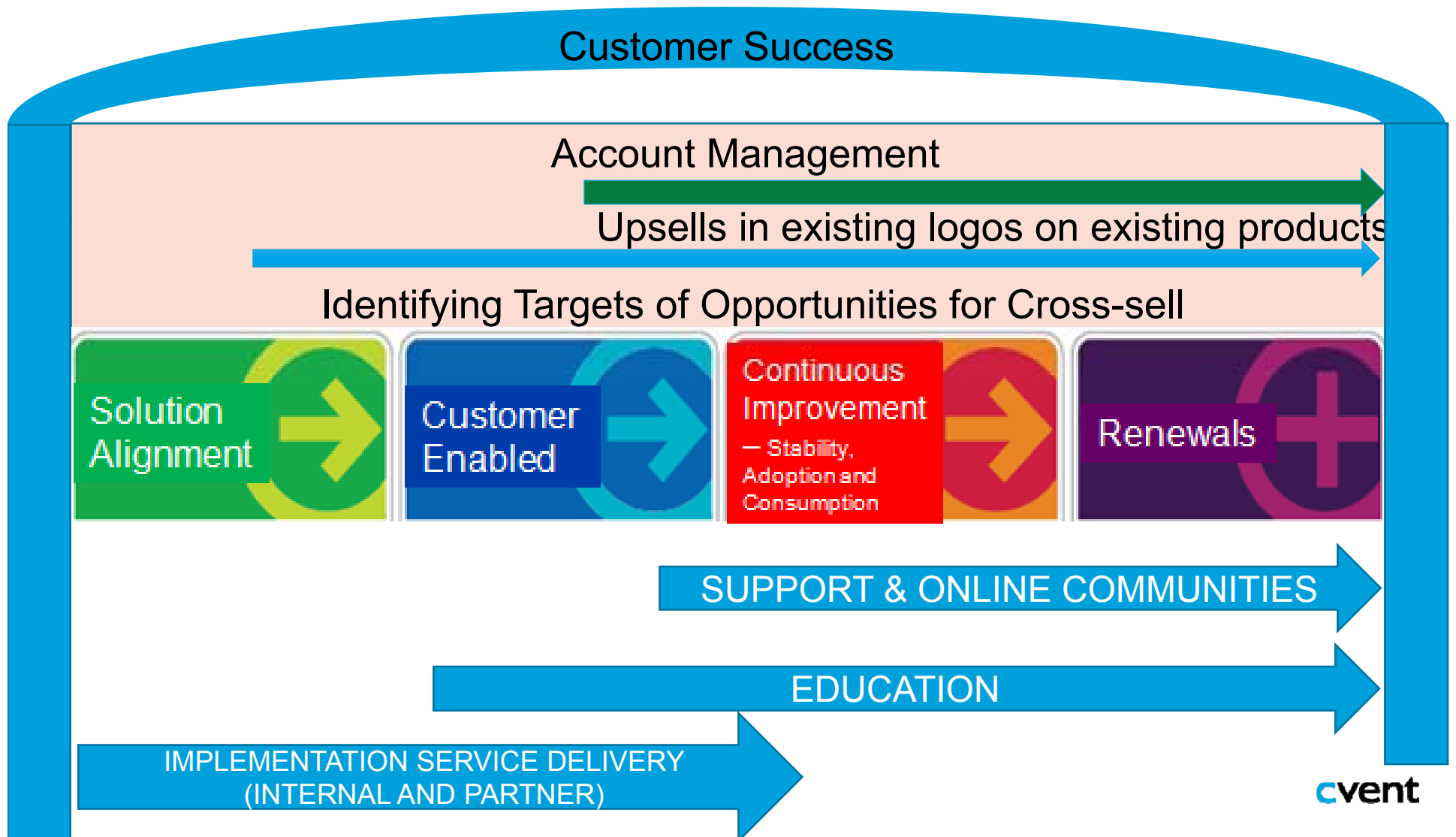
Lessons learned and root cause analysis for significant losses

Contract review to flag potential future risk and plans to mitigate

Leverage the T-12 Account Review to identify risk 12 months before
ons

When choosing a Reason for Loss, look at the root cause. Ask yourself:
'If we could have impacted one thing to mitigate the loss, what was it?'

9 Key Functions – Customer Success Framework



In Summary

- Businesses customers are also demanding the level of service and the seamless fluidity they experience when they have an individual customer experience.
- Since the number of contributions is quite high, it produces a richer result.
- Make it very easy to contribute.
- Simplify your organizational structure to support a Customer Success Framework to ensure strategic speed (clarity, unity and agility).
- $\text{Drive Value} = \text{Measurable Results Achieved} + \text{Process Improvement outweighs the cost of the solution} + \text{maintaining the solution}.$
- It's time for some lateral thinking on the customer experience, and for organizations to open their eyes to how inextricably linked employees and customers of all types are.



Lessons
Learned

Thank You!

Q&A



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