



# Head of Customer Success

## Goals

## As measured by

**Transform our tier 1 customer experience by end of March**

1. Increase tier 1 NPS from 15 to 25 by end of March
2. Enroll 80% of tier 1 customers in new executive sponsor program by February 14
3. Facilitate 3 tier 1 launches with Redesigned Customer Success Kickoff deck by March 5

**Exceed our renewal target in preparation for fundraising in Q2**

1. Achieve 90%+ renewal rate by end of Q1
2. Ensure 40% of renewals are multi-year contracts
3. Confirm each Customer Success Manager has a renewal plan for their top 10 customers by end of January (70 plans)
4. Conduct a business value assessment with top 50 customers by February 5

**Align company on 2020 Customer Success strategy by end of March**

1. Receive approval on 2020 Customer Success strategy from executive team by January 15
2. Achieve 70% completion rate on tier 1 and 2 survey by January 30
3. 90% training attendance of sales team on new handoff process by March 1
4. Ensure executive sponsors assigned for 100% of tier 1 and 2 customers by end of March

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Adopting OKRs for goal creation ensures employees in every department and function are aligned and working toward the organization's top priorities.

Every organization is unique and there is no one-size-fits-all approach to Continuous Performance Management. You want to understand all the learnings and best

practices, and then use them to craft the unique program that best fits your organization's culture and business needs.

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# Customer Success Lead

## Goals

## As measured by

**Develop a world-class Customer Success team by end of March**

1. Hire 2 new Customer Success Managers by end of February
2. Hold first meeting of new program to share best practices and learn from each other by February 15
3. 80% completion of LinkedIn Learning Path by end of March

**Rebuild executive sponsorship within our account base**

1. Develop target profile for ideal executive sponsors by end of January
2. Ensure 90% of QBRs include executive sponsor in attendance
3. Increase sponsor NPS from 25 to 32 by end of March
4. Launch sponsor community and enroll at least 50 executive sponsors

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# Customer Success Manager

## Goals

## As measured by

**Successfully launch new customer ACME Industries by end of March**

1. Enable ACME Industries HRIS integration by January 15
2. Select and train executive sponsor by Feb 15
3. 90% provisioned users complete LMS training by end of March
4. 80% provisioned users engage with platform by end of March

**Build an amazing CSM team culture**

1. 90% team survey completion for suggestions by January 15
2. Host 4 team happy hours by March 10
3. Receive 90% positive feedback on team-building offsite scheduled for March 18

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