Success Plan Canvas

The Success Plan Canvas is a tool designed for Account Managers and Customer Success Managers. It facilitates the setup of a Joint Success Plan - the initial agreement between Sales, Customer Success, and your customer.

Do you want to reduce your churn and increase your up- and cross-selling? Then learn more about our Customer Success programs at saas-collective.com.

REVGUIDES
formerly **SaaScollective**

Steven van Rij, Tobias Liebsch, Mick Weijers

Success Plan Canvas

Client

REVGUIDES
formerly **SaaScollective**

1. Company highlights

Company details
Short history, main products & services, industry trends, internal systems/tools used.

Key Stakeholders
Which internal/external persons. groups and decision makers should we take into account and are affecting our project. For complex products it makes sense to create a stakeholder map.

Decisions makers: ...
Budget owner: ...
Project team: ...
Who are the influencers, Champions, and Detractors? ...
User groups: ...

Priorities

Other highlights?

2. P.I.N.C.

PROBLEMS • IMPACT • NEEDS • CONSTRAINTS

Problems
Which problems/challenges does this customer want to solve?

Impact
What is the impact of those problems on the customer's business?

Needs
Which needs does our customer have related to our product/service?

Constraints
Which constraints and challenges do we need to overcome or should we be aware of?

3. Products & services

Which products/services have been bought?

4. Desired outcomes / experience

What outcomes is the customer looking for? What kind of experience does the customer require to achieve this?

How is our product/service helping our customer to achieve their outcomes?

5. Success criteria & KPI

How would success look like for this company? What are the criteria for that?

Which success stories of other clients can you share here?

6. Risks & opportunities

Think about the threats & risks which could intervene with the success plan and endanger the relation and value of your product.

Which up- and cross-sell potentials do you see?

7. Success milestones

Which milestones and actions are defined on the road to success?

For every action, add a due date and also a person accountable.

Communication & process

Think about the threats & risks which could intervene with your plans and endanger the relationship and value of your product.

Best practices

Review regulary

Your plan is a living document and should be updated based on new insights. Also review/walkthrough during every (Q)BR.

Share with customer

It's best if this canvas is openly shared with your customer, it will keep you sharp to do a proper problem discovery and provides a natural feedback loop.

Disciplined execution

Execution is the breakfast of champions. Without it, your plan stays a fantasy!

Share with customer

For most B2B companies, it makes most sense, if the sections marked with * are gathered and saved in your CRM by sales to be part of the handover to CS. CS needs to re-validate them during kick-off with clients.

Success Plan Canvas

Client

REVGUIDES
formerly SaaScollective

1. Company highlights

2. P.I.N.C.
PROBLEMS • IMPACT • NEEDS • CONSTRAINTS

3. Products & services

4. Desired outcomes / experience

5. Success criteria & KPI

6. Risks & opportunities

7. Success milestones

Communication & process

Best practices

Review regulary
Your plan is a living document and should be updated based on new insights. Also review/walkthrough during every (Q)BR.

Share with customer
It's best if this canvas is openly shared with your customer, it will keep you sharp to do a proper problem discovery and provides a natural feedback loop.

Disciplined execution
Execution is the breakfast of champions. Without it, your plan stays a fantasy!

Share with customer
For most B2B companies, it makes most sense, if the sections marked with * are gathered and saved in your CRM by sales to be part of the handover to CS. CS needs to re-validate them during kick-off with clients.