{{Customer Logo}}
{{Date}}

{{Customer Name}}

{{Preview}} | {{Partnership Updates}} | {{YYYY Planning}}

{{AE Name}} **{{SE Name}}** **{{CSM Name}}** **{{CSE Name}}**

{{Customer Logo}}

{{Date}}

Agenda

{Module #} API

- {M1 -} Team Introductions *[stakeholders]*
- {M2 -} Partnership Updates *[shared strategy]*
- {M3 -} Success Plan Updates *[priorities & KPI list]*
- {M4 -} Value Adoption Highlights *[measure & expand]*
- {M5 -} Training & Enablement *[increase ROI]*
- {M6 -} Communication Cadence *[stakeholder group]*
- Appendix
  - {M7 -} Why Change? *[solution overview]*
  - {M8 -} Why Change Now? *[accelerate time to value]*
  - {M9 -} Why Change with Us? *[dog food / thought leadership]*

Team Introductions

{{Customer Logo}}

{{Date}}

Your Account Team

Relationship Manager	Solutions Engineer	Customer Success Manager	Customer Success Engineer
{{AE Name}}	{{PreSales Name}}	{{BRM Name}}	{{SME Name}}
Strategic Alignment accountexec@vendor.com	Use Case Creation & Validation presales_name@vendor.com	Business Relationship Manager brm_name@vendor.com	Adoption & Best Practices sme_name@vendor.com
{{Title}}	{{Title}}	{{Title}}	{{Title}}
{{Name}}	{{Name}}	{{Name}}	{{Name}}
client_name1@client.com	client_name2@client.com	client_name3@client.com	client_name4@client.com

(CRM-SYSTEM API)

Partners & Stakeholders

{{Customer Logo}}

{{Date}}

Business Sponsors	{{Name}} *{{Title}}*	{{Name}} *{{Title}}*	{{Name}} *{{Title}}*
Champions & Admins	{{Name}} *{{Title}}*	{{Name}} *{{Title}}*	{{Name}} *{{Title}}*
Power Users	{{Name}} *{{Title}}*	{{Name}} *{{Title}}*	{{Name}} *{{Title}}*

Stakeholder Groups	Finance & Operations		Engineering (Dev/SecOps)				Line of Business		Go To Market	
	AP/AR	SOX	SRE	DevOps	InfoSec	Product	BI	Customer Service	Sales	Marketing

(CRM-SYSTEM API)

Steering Committee

{{Customer Logo}}

{{Date}}

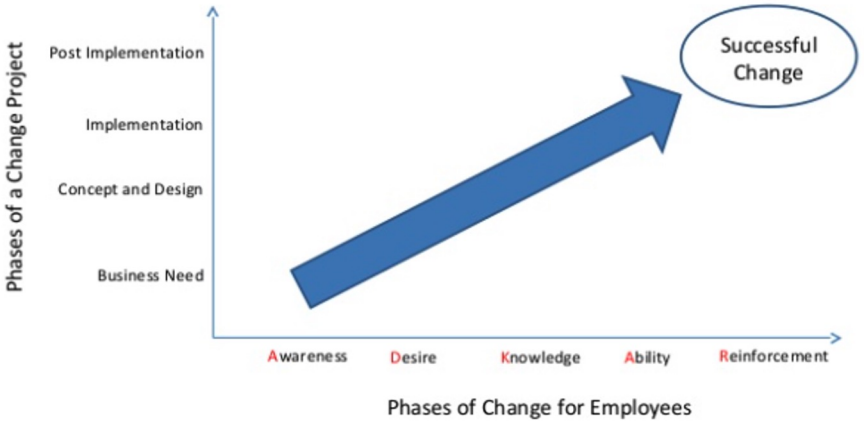
Role	Name	Expertise	Influence
Executive Sponsor	{{Name}} *{{Title}}*	Business Need	• Business Owner
Change Agent	{{Name}} *{{Title}}*	Concept & Design	• Budget Owner
Delivery Agent	{{Name}} *{{Title}}*	Implement & Deliver	• POV Champion
Adoption Agent	{{Name}} *{{Title}}*	Grow & Measure	• Champion / Power User
Critical Stakeholder	{{Name}} *{{Title}}*	Influencers & Detractors	• Indirect Owners
Target Audience	{{Name}} *{{Title}}*	Users & Consumers	• End User

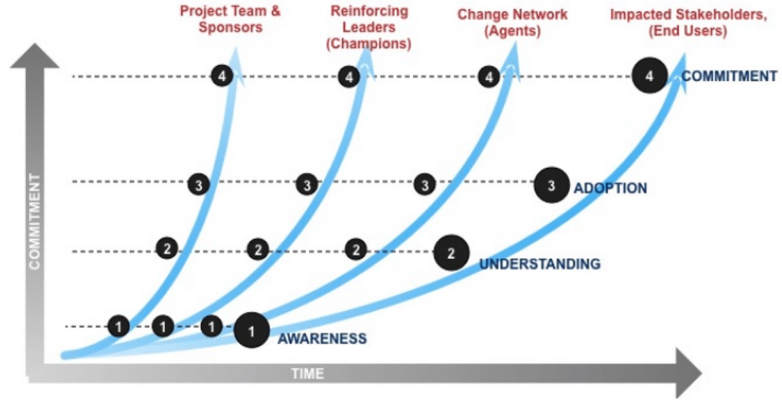
(CRM-SYSTEM API)

People, Process, & Technology [Change Mgmt.]

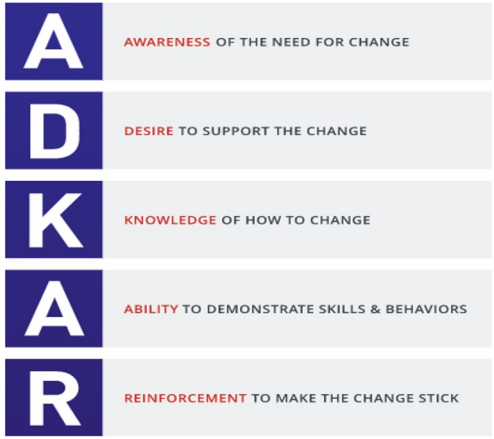
{{Customer Logo}}

{{Date}}





Change Commitment Curve.



Audience:	Organizer:	Recommended Cadence:	Commitment:
Executive Sponsors	{{Account Executive}}	Every 6mo	90 min
Business Owners	{{Customer Success}}	Every 3mo	60 min
Project Team	{{Customer Success}}	Slack and Monthly	30 min
End User Office Hours	{{Account Support}}	Slack and Monthly	30 min

News and Notifications

{{Customer Logo}}

{{Date}}

Key Updates

{{Industry}} Competitive Landscape

{{Customer Logo}}

{{Date}}

Strengths

- {{Improved Customer Experience}}
- {{Revenue Protection}}

Weaknesses

- {{Tool Unification}}
- {{Zero Mgmt. Overhead}}

Opportunities

- {{Deeper Business Insights}}
- {{Faster Release Cycles}}

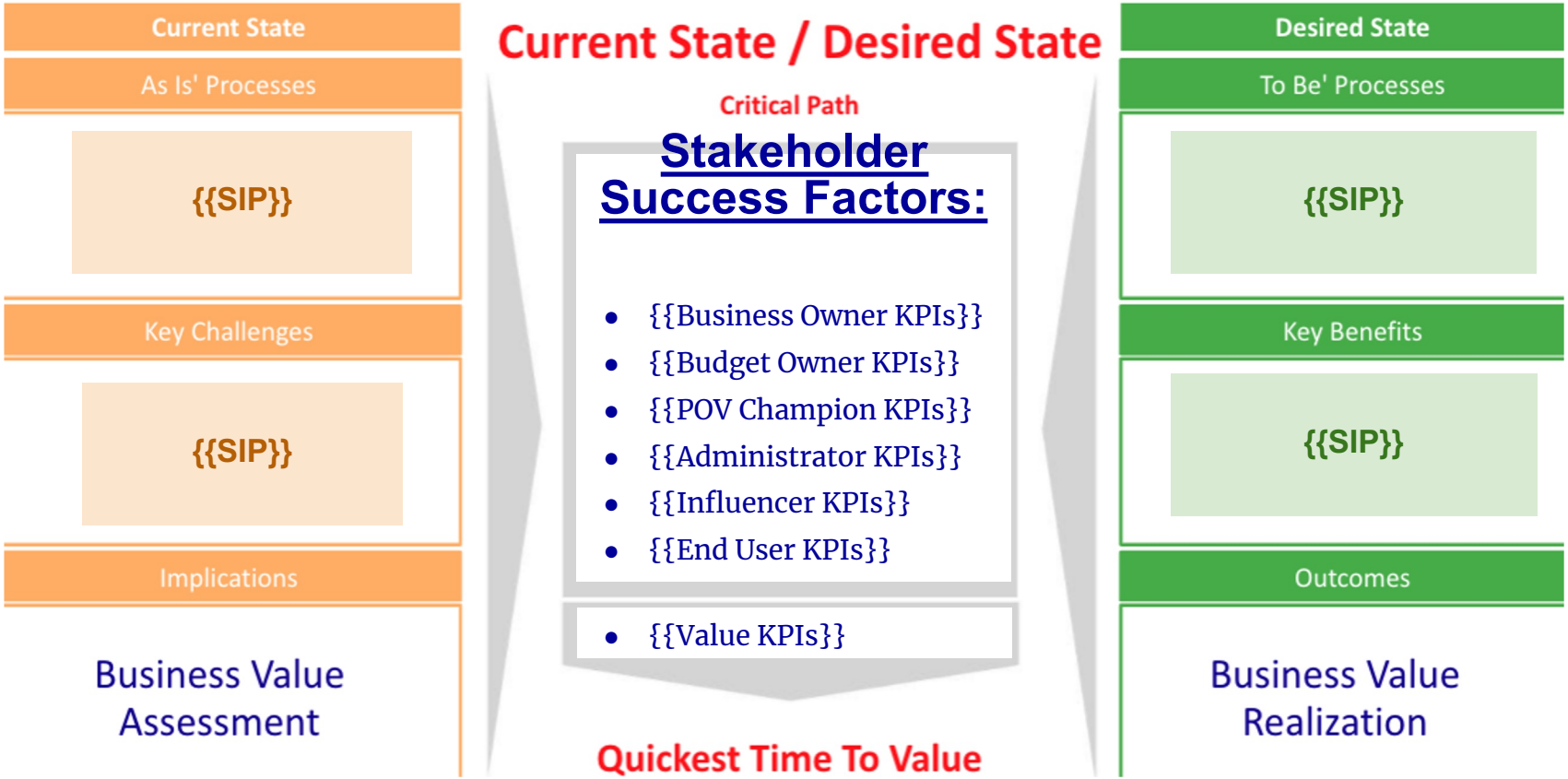
Threats

- {{Improved Audit & Compliance}}
- {{Improved Security Posture}}

(Gartner/Forrester/Ecosystems API)

{{Customer Logo}}

{{Date}}



{{Customer Logo}}

{{Date}}

Partnership Plan

{{Customer Logo}}

{{Date}}

Economic Landscape As-Is-Situation

{{Account Name}} Mutual Success Plan

{{Customer Logo}}

{{Date}}

Business Value Drivers

Revenue Protection	Improved Customer Experience	Faster Release Cycles	Deeper Business Insights	Improved Security Posture	Improved Audit & Compliance	Zero Mgmt. Overhead	Tool Unification
{{vx1}}	{{vx1}}	{{vx1}}	{{vx1}}	{{vx1}}	{{vx1}}	{{vx1}}	{{vx1}}

Use Cases

Security Analytics	Operational Analytics	Business Analytics
{{SIP Security Use Case}}	{{SIP Operational Use Case}}	{{SIP Business Analytics Use Case}}
{{SIP Security Use Case}}	{{SIP Operational Use Case}}	{{SIP Business Analytics Use Case}}

Business Outcomes / Measures of Success

- ★ {{BVA Issue KPI}}
- ★ {{BVA Issue KPI}}
- ★ {{BVA Issue KPI}}

- ★ {{BVR Solution/KPI}}
- ★ {{BVR Solution/KPI}}
- ★ {{BVR Solution/KPI}}

Roadmap Priorities

Short-Term Priorities (<3-6 months)	Longer-Term Objectives (6 months +)
1. {{Asana Workstream 1}} 2. {{Asana Workstream 2}} 3. {{Asana Workstream 3}}	1. {{BVR Workstream 1}} 2. {{BVR Workstream 2}} 3. {{BVR Workstream 3}}

(CRM-SYSTEM API)

{{Account Name}} Mutual Success Plan (By Workstream)

{{Customer Logo}}

{{Date}}

(TICKETING API)

User Group	Outcomes
Engineering: Personas: {{DevOps Engineer}} {{SRE}} {{Management}} **Champion(s):** {{InternalName}}	• Automate rollback of releases that cause errors in production • Reduce MTTI/MTTR • SLOs / SLAs
Security: Personas: {{SecOps Engineer}} {{InfoSec Engineer}} {{Management}} **Champion(s):** {{Lucid}}	• Identify system anomalies and send automated alerts • Automate identification of new error messages • Automate Incident Responses • Identify incidents more quickly • Reduce Loss / Risk profile
Business: Personas: {{Product Manager}} {{Data Scientist}} {{Management}} **Champion(s):** {{InternalName}}	• Increase CLTV • Decrease Time to Market • Increase Time to Value • Automation & Efficiency • Business Line Enablement
Vendor: Personas: {{CSM}} {{CSE}} {{Management}} **Champion(s):** {{CRM-SYSTEM}}	• Increase Time to Value • Automation & Efficiency • Business Line Enablement • Value Realization • Best Practices

Q2 Q3

MAR APR MAY JUNE JULY

{{Asana Project 1}}

{{Asana Project 2}}

{{Asana Project 3}}

Technical Onboarding | Office hours | Classes | Adoption Checkpoint | Best Practices | Account Optimization | BVA / BVR Review

Mutual Success Plan | User Groups | Value Checkpoint | Working Groups | Persona Optimization | Quarterly Business Review

{{Customer Logo}}

{{Date}}

Economic Benefits To-Be-State

{{Customer Logo}}

{{Date}}

Adoption Updates

{{Customer Logo}}

{{Date}}

Adoption Tracker Report

{{Account Name}} Stakeholder Adoption

{{Customer Logo}}

{{Date}}

- {{Account Details Highlights}}
- {{Dashboard Views}}
- {{Power User Highlights}}
- {{Client Feedback}}
- {{Client Notes}}

{{Client Health Score}}

{{Client Value Metrics Score}}

(CRM-SYSTEM API)

{{Customer Logo}}

{{Date}}

Training & Enablement

{{Customer Logo}}

{{Date}}

Training & Enablement Plan and Milestones

{{Customer Logo}}

{{Date}}

Product Announcements

{{Customer Logo}}

{{Date}}

Training Announcements

{{Customer Logo}}

{{Date}}

Training Reference

{{Customer Logo}}

{{Date}}

Communication Schedule

{{Customer Logo}}

{{Date}}

Prior Meeting: Notes, Actions

{{Customer Logo}}

{{Date}}

Current Meeting: Agenda and Status

{{Customer Logo}}

{{Date}}

Meeting Schedule: Goals and Milestones

Appendix

{{Vendor Logo}}

{{Customer Logo}}

{{Date}}

Why Change?

{{Vendor Logo}}

{{Customer Logo}}

{{Date}}

Why Change Now?

{{Vendor Logo}}

{{Customer Logo}}

{{Date}}

Why Partner with Us?