

Foundations of Customer Success™ Curriculum Overview

Provide your customer success team with the skills, tactics, and tools to manage post-sale customer relationships, renew, and grow customer accounts.

Learn how to lead impactful customer meetings, identify growth opportunities, manage challenging conversations, and leverage critical time management skills.



Program Benefits:

- Smoother sales to CS handoffs
- Build deeper customer relationships
- Lead outcome-based customer meetings
- Identify growth opportunities
- Manage difficult customer conversations
- Improve time management



Best For:

- CSMs
- Account Managers
- Other customer-facing roles



Workshop Length:

- Two days onsite or six 2-hour VILT sessions



Delivery Options

- Instructor-led training
- Virtual instructor-led training

Customization:

SBI understands that each sales organization is unique, with its culture, processes, and set of abilities and challenges.

Training programs include pre-training consultation and are personalized for your organization with customized case studies, examples, and exercises to make the training more relevant to program participants.



Lesson 1

- Recognize Customer Success (CS) as a profit Center
- Understand the growth of the CS function
- Identify how CS drives value for the customer
- Recognize the CS Manager's role at each stage of the customer journey
- Make the value of CS visible in the organization



Lesson 2

- Kickoff: Engage stakeholders
- Reduce friction in the Sales-to-Customer Success handoff
- Build rapport with customers
- Co-create a Mutual Action Plan
- Define the customer journey



Lesson 3

- Lead outcomes-based meetings
- Research to support successful customer meetings
- Plan meetings to maximize efficiency and achieve outcomes
- Lead meetings to engage customers and grow value



Lesson 4

- Ask questions to build value
- Ask questions to align, assess usage, and activate growth
- Understand root causes of customer resistance
- Anticipate and avoid difficult conversations



Lesson 5

- Handle difficult conversations
- Handle customer feedback with empathy
- Manage resistance
- Set boundaries to maintain healthy customer relationships
- Build on positive feedback



Lesson 6

- Manage time, promote change
- Help customers navigate their journey
- Balance task urgency and importance to prioritize time
- Make work easier to increase efficiency
- Facilitate change management



WHY SBI?

Driven by insights and delivered from experience, SBI continues to help clients grow their revenue, margin and enterprise value in ways never before possible. Working with us, leaders can expect confidence and trust with experienced partners every step of the way. We engage and support our clients as an extension of their team, both guiding and working side-by-side to deliver relatable, practical strategies that work for today and tomorrow.

Connect with SBI today and talk to us about how we can help you on your growth journey.

Learn more: sbigrowth.com



Grow
Intelligently

Contact Us:
marketing@sbigrowth.com