

Customer Success Intensive

Overview

The foundation every customer success professional needs to increase retention and maximize lifetime value. Reps learn strategies to prevent churn, negotiate renewals, navigate API integrations and much more.

Estimated Time: **8-12 hours/week for 12-18 weeks***

* Estimated time and duration the average learner may take to complete all coursework, including hands-on practice and project time. May be completed on the learner's schedule, at any time. Actual duration from start to finish may vary.

Leading Experts

Taught through candid discussions with dozens of featured experts, including:



Kristi Faltorusso is an award winning Customer Success Executive with experience in building, scaling and transforming Customer Success organizations. Currently, she is the Chief Customer Officer at ClientSuccess, a leading Customer Success Management solution. In addition, she is the Founder of Keeping CS Simple, a content experience, supporting the simplification of Customer Success for Executives, CS Leaders, CPSs and more.



Brian Raboin is an entrepreneurial spirited leader with more than 10 years of experience in developing and delivering high quality products and managed services in the SaaS and IaaS space. He is a thought-leader in the world of product development and customer success. Brian previously led Customer Success at Booker & Mindbody, and currently serves as Chief Strategy and Operations Officer at Stenson Tamaddon.



Megan Bowen is an operator, a problem solver and a customer advocate who has a proven track record of building and leading teams that scale and succeed. She has experience working across early-stage startups and later-stage companies primarily focused on B2B account management, customer success, marketing, sales, customer service, and operations. Megan is currently the COO at Refine Labs, a demand accelerator for B2B SaaS companies.

Section 1

Getting Customers Started

- The Customer Lifecycle
- Onboarding
- Setting Expectations

Section 2

Keeping Customers Engaged

- Getting Customers to First Value
- Proactive Engagement
- Empowering Your Customers

Section 3

Handling Difficult Situations

- Identifying and Handling At-Risk Customers
- Having Difficult Conversations
- Building a Relationship with Sales

Section 4

Identifying New Opportunities

- Running a Customer Objectives Review
- Expansion and Renewals

Section 5

Setting Yourself Up for Success

- How to become a top performer
- Metrics & Terminology
- Career Pathing

Section 6

Role Playing

- Onboarding role play
- Difficult conversation role play

Section 7

Where Sales and CS Collide

- Sales Meets CS
- Negotiating Renewals
- Storytelling

Section 8

Customer Success Plans

- Customer Kickoff Calls
- Business Reviews

Section 9

Customer Health

- Guiding your customers through big changes
- Customer health scoring
- Churn deep dive

Section 10

Thinking Like an Executive

- Doubling Down on Customer Success
- How CS Leaders Communicate CS Metrics to the Board

Section 11

APIs & Technical Integrations

- What's an API?
- Navigating technical integrations

Section 12

Life in Tech & Customer Success

- Mental Health in CS
- Customer Success Career Perspectives
- Stock Options & Equity Education

Section 13

Utilizing the Tech Stack

- CRMs
- Customer Success Platforms
- Customer Support Platforms