

Increase your customer loyalty & secure your recurrent revenue

From the Customer Success Team perspective



Presentation of the department



Structure & Organization of the activities



Optimize de customer experience



Maintain close relationships



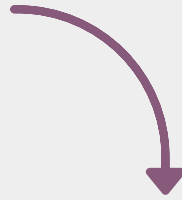
Conclusion



Presentation of the department

What for ?

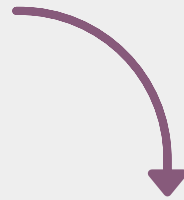
Differentiate Existing customers
management from New Business



- Prospecting new customers
- Qualify & Demonstrate
- Negotiate
- Sale

What for ?

Establish a strict follow up



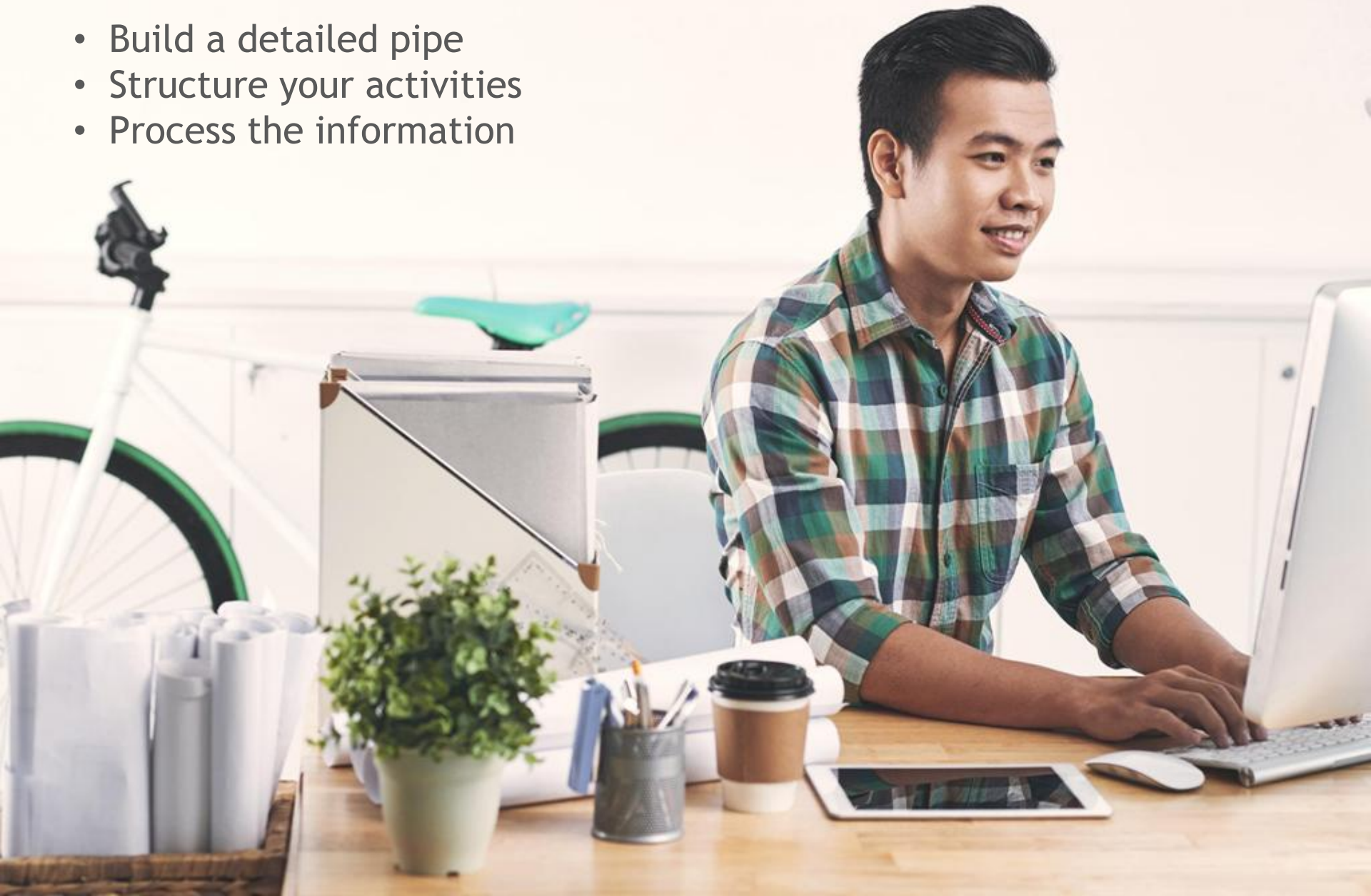
- Decrease churn rate
- Identify Cross-sell & Upsell on-time
- Renew services on-time
- Generate stable recurring revenue



Structure & Organization of the activities

Helps you keep a close eye on each customer

- Build a detailed pipe
- Structure your activities
- Process the information



Build a detailed pipe

Sales Dashboard Sales Invoicing Configuration 1493 🗨️ 📞 👤 Ruben Scheer (rsc)

Dashboard / Next Activities / Saas - Agrolait

[EDIT](#) [CREATE](#) Attachment(s) Action 5 / 5 < >

[NEW QUOTATION](#) [MARK WON](#) [MARK LOST](#) [LOG ACTIVITY](#) [TERRITORY](#) [QUALIFIED](#) [QUALIFIED SPONSOR](#) [PROPOSITION](#) [NEGOTIATION](#) [MORE](#)

0 Meeting 0 Quote(s) Log a Call Schedule Call

Opportunity

SaaS - Agrolait

1,200.00€ at 25 %

Customer	Michel	Next Activity	Call on 10/11/2016
Email	michel.fletcher@agrolait.example.com		Implementation progress
Phone		Expected Closing	11/30/2016
Salesperson	Ruben Scheer (rsc)	Rating	☆☆☆
Sales Team	BE Customer Success	Score	0.00
		Tags	SaaS - Customer Interested in ope...

[INTERNAL NOTES](#) [CONTACT INFORMATION](#) [ASSIGNED PARTNER](#)

In the process of v9 migration - Training on Accounting requested

Industry : Milk producer
Number of employees : 15
Apps installed : CRM, Sales, MRP, Inventory, Accounting, Invoicing

[NEW MESSAGE](#) Log an internal note [FOLLOWING](#) ONE FOLLOWER

Today

Build a detailed pipe

The screenshot displays a CRM interface for a sales opportunity. At the top, a purple navigation bar includes 'Sales', 'Dashboard', 'Sales', 'Invoicing', and 'Configuration'. The user 'Ruben Scheer (rsc)' is logged in. The breadcrumb trail shows 'Dashboard / Next Activities / Saas - Agrolait'. Below this, there are buttons for 'EDIT' and 'CREATE', and a dropdown for 'Attachment(s) Action'. A progress bar at the top right shows stages: TERRITORY, QUALIFIED, QUALIFIED SPONSOR (highlighted), PROPOSITION, NEGOTIATION, and MORE. Action buttons include '0 Meeting', '0 Quote(s)', 'Log a Call', and 'Schedule Call'. The main content area shows the opportunity name 'Saas - Agrolait' with a value of '1,200.00€ at 25 %'. Customer details include 'Michel' (michel.fletcher@agrolait.example.com) and salesperson 'Ruben Scheer (rsc)'. A 'Next Activity' log shows a call on 10/11/2016 with 'Implementation progress' and an 'Expected Closing' of 11/30/2016. The 'INTERNAL NOTES' section contains a note about v9 migration training. At the bottom, there are buttons for 'NEW MESSAGE' and 'Log an internal note', and a 'FOLLOWING' status with 'ONE FOLLOWER'. A 'Today' separator is visible at the bottom.

Sales Dashboard / Sales Invoicing Configuration

1493 Ruben Scheer (rsc)

Dashboard / Next Activities / Saas - Agrolait

EDIT CREATE Attachment(s) Action 5 / 5

NEW QUOTATION MARK WON MARK LOST LOG ACTIVITY

TERRITORY QUALIFIED QUALIFIED SPONSOR PROPOSITION NEGOTIATION MORE

0 Meeting 0 Quote(s) Log a Call Schedule Call

Opportunity

Saas - Agrolait

1,200.00€ at 25 %

Customer: Michel
Email: michel.fletcher@agrolait.example.com
Phone:

Salesperson: Ruben Scheer (rsc)
Sales Team: BE Customer Success

Next Activity: Call on 10/11/2016
Implementation progress
Expected Closing: 11/30/2016

Rating: ☆☆☆
Score: 0.00
Tags: SaaS - Customer Interested in ope...

INTERNAL NOTES CONTACT INFORMATION ASSIGNED PARTNER

In the process of v9 migration - Training on Accounting requested

Industry: Milk producer
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NEW MESSAGE Log an internal note FOLLOWING ONE FOLLOWER

Today

Monitor your (forecasted) revenues

Dashboard / Next Activities

My Opportunities x Expected Closing Date > Stage x Search...

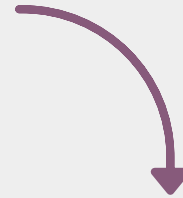
CREATE IMPORT

Filters Group By Favorites

▼ October 2016 (10)	30,337.00
Territory (0)	0.00
Qualified (0)	0.00
▶ Qualified Sponsor (6)	15,214.00
▶ Proposition (4)	15,123.00
Negotiation (0)	0.00
Won (0)	0.00
Lost (0)	0.00
▼ November 2016 (17)	38,644.00
▶ Territory (1)	1,200.00
Qualified (0)	0.00
▶ Qualified Sponsor (14)	36,504.00
▶ Proposition (2)	940.00
Negotiation (0)	0.00

Tracking & Analyzing

Your data will help you to

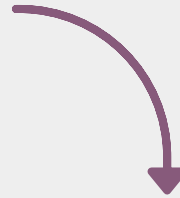


- Estimate Churn rate (#customer + revenue loss)
- Identify customers' profile that usually churn (have a head start)
- Identify upsell/crossselling schemes



Optimize the customer
experience

Reactivity & Proactivity



- Fast answer to issues
- Present novelties that match with your customer configuration

Customer level of adoption

- Needs vs Solution delivered
 - “What is the customer’s dream solution ?”

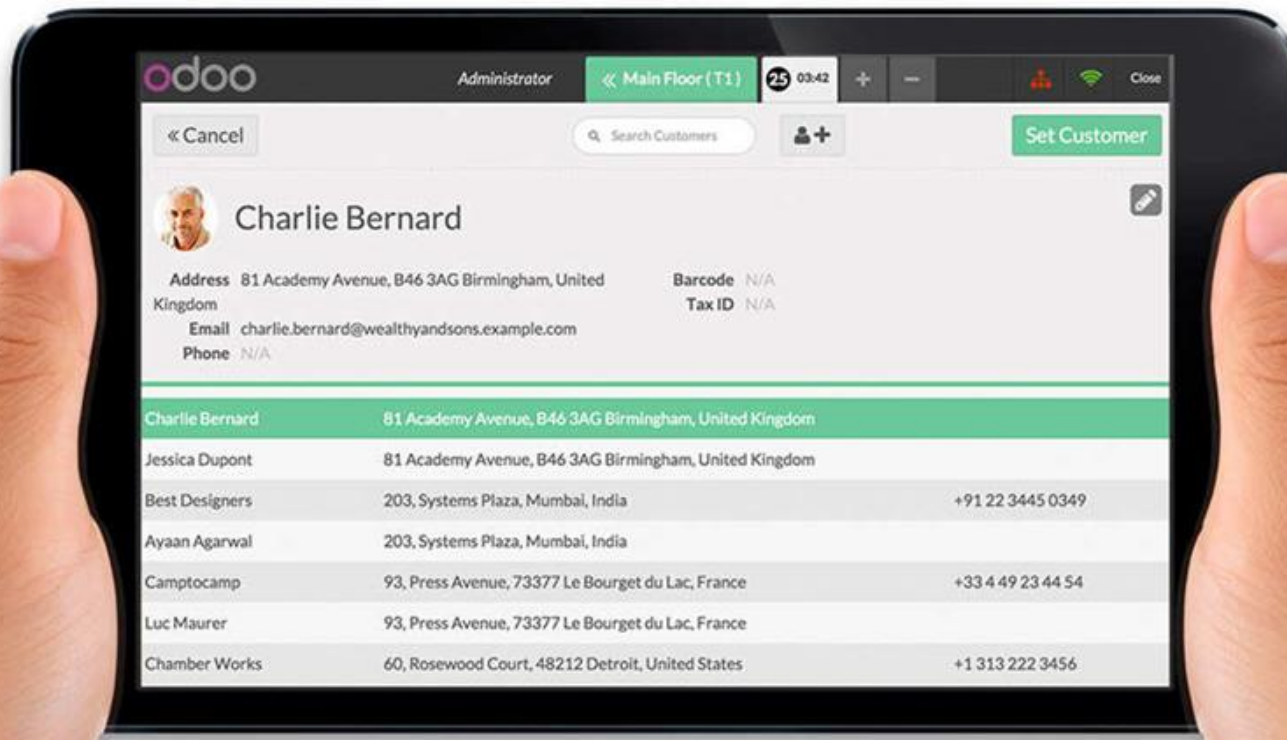
Customer service satisfaction

- Success Stories
- Learn from it and reproduce it in the future

Enlarging the scope of usage

Forsters **loyalty**

Use up-to-date information to identify **upsell** and **crosssell** opportunities.



Customer potential in 1 year (renewal + upsell)

- Qualification
- Level of adoption

Customer potential in 3 years

- Qualification
- Level of adoption
- Follow up



Maintain close
relationships

Maintain close relationships...

To establish trust

- Keep each party on good terms
- Understand your customer reasoning & speak in his terms
- - Adapt your Sales & Marketing Approach
- Ensure customer is happy and prevent issues escalation
- Long-term vision



Conclusion

Thank you.



#odooexperience