

1

PROCESS INFOGRAPHIC

- ✓ This worksheet is designed to help you to start thinking critically about your customer life cycle.
- ✓ **Goal:** Use the questions as a starting point to brainstorm about your customer life cycle, bottlenecks, issues, time management, and ideal clients.
- ✓ **Action:** Your CSM will use this to help you identify the specific processes in your current customer life cycle.

2

PROCESS QUESTIONNAIRE

- ✓ This worksheet is designed to help you document your brainstorming process from #1.
- ✓ **Goal:** Use the questions as a starting point to brainstorm about your customer life cycle, bottlenecks, issues, time management, and ideal clients.
- ✓ **Action:** Your CSM will use this to help you build out the initial segments and alerts that will be created in the trainings.

3

ONBOARDING PROCESS MAP

- ✓ This worksheet is designed to help you to start thinking about your customer's use your application.
- ✓ **Goal:** Fill out the different steps in your customer onboarding process. Identify the actions your customer should take at each step, the actions your internal team should take, and how long an ideal customer would take to complete each step.
- ✓ **Action:** Your CSM will use this to help you design alerts, plays, and journeys during your training sessions.

4

USE CZ TO PLAN YOUR DAY

- ✓ This worksheet is designed to help you to identify how much of your team's day is repetitive and manual.
- ✓ **Goal:** In the worksheet, estimate the time, activities, and type of action that your team takes on a daily basis.
- ✓ **Action:** Your CSM will use this to create use cases for further automation of tasks and activities in ChurnZero.

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ADDITIONAL RESOURCES

- ✓ **ChurnZero Training Process**
Don't know what to expect from the training? Learn more about what is involved in our training process and the modules that are covered.
- ✓ **Best Practices: Segmentation**
Stuck on what a good segment would be or how to segment your customer base? Use the examples and questions in this guide to help jump start and organize your segments.

CONGRATS

Time to get these ideas into ChurnZero!