2021 Planning Checklist

☐ **INTERVIEW LEADERSHIP TEAM**
Conduct a series of interviews with other leaders on the team. Meet with your sales, product, marketing, finance, services, support and operations leaders, along with your CEO, and ask: What do you see as the primary objective of the success team going into the coming year? What is and isn't working, from your perspective? How do you think that success should be measured? This will inform your plan and uncover conflicts you may need to address.

☐ **REVIEW CUSTOMER DATA**
Review the data you've collected on your customers, and decide if you need to make any adjustments to your program next year. Look for areas where customer behavior is changing. Are they purchasing more, on average? Are they taking longer to onboard? Are they giving you different reasons for churning? Use this information to determine whether you need to make any changes to your segmentation, customer journey map, or processes.

☐ **EVALUATE TOOLS AND PROCESSES**
The work you did on customer data leads right into an assessment of your processes and tools. Can you track all of the data you need? Are you maximizing your existing tools? Do you need to add processes to create a better customer experience? If you noticed a lot of customer behavior changes in your customer analysis, you may need to completely revisit your customer journey map and team processes. Start evaluating any new tools now so that you can add them to your budget for 2021.

☐ **ALIGN METRICS AND GOALS**
Once you have your program outlined you can think about what makes sense from a metrics standpoint. Consider metrics in 3 key areas of customer success: retention, expansion, and satisfaction. Think about the tools and measures you already have in place, and create a plan that leverages that data. If you need to add new measurement points, add those now so you have a baseline going into next year. Once your metrics are established, use those to draft department and team goals.

☐ **ASSESS TEAM**
When your goals are established you can start to assess your team against the performance expectations for next year. Who are your rock stars? Can you give them challenges to help them develop further over the next year? Who are your potential leaders, and how can you build their leadership skills? Who is falling behind? Can you bring them to the level of the team, or do you need to move them to a different role or out of the group?

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☐ **BUILD HIRING AND COMP PLANS**
Use data from sales, combined with your own churn expectations, to determine how many customers you'll be serving in each segment every month. This will indicate when you need to hire. Don't forget about managers and operations staff. Think about compensation as well: most customer success roles now include variable comp. Create a compensation plan that is tied to the goals for each role on your team.

☐ **DEVELOP A BUDGET**
Some organizations are great about getting their annual budgets finalized early. Unfortunately, most end up pushing final approval well past the end of the year. You can get around this common issue by developing a working budget ahead of time. Talk with your finance team about the format they use, and develop a draft budget that includes headcount, variable comp, tools, training, and team events. Ask for approval to use this working budget until the official company budget is finalized.

☐ **COMMUNICATE AND TRAIN**
You need to clearly communicate any changes that you've made to the program, roles, goals, and compensation plans. You'll also need to train the team on any new processes or tools that you've decided to add. Keep in mind that different people learn in different ways, so be sure to communicate both in meetings and in writing to cover your bases.

LEADERSHIP TRAINING & COACHING

The Success League is made up of senior customer success leaders who have experience with all aspects of annual planning. Two of our offerings are ideal for leaders who are new to this process or who need help with specific pieces:

CS Leadership Training Program - Our leadership program is a practical guide to planning and includes courses on journey mapping, building playbooks, hiring, onboarding team members, budgeting and executive communication. **Our next series starts on October 20, 2020.**

Leadership Coaching - One on one coaching is ideal for leaders who are facing specific challenges or need to build leadership skills in general. **Coaching is available year-round.**