

Plantt.

The Top 4 Stages in Your Customers' Journey

(You Should Be Focusing On)



As customer success managers, your job is to accompany the customer during their journey, providing them with the best experience possible. While each customer has a unique path, several stages overlap and are required for every customer.

The following guide will help you understand what these stages are, why they're so important and provide you with guidance on how to succeed in each one.

Let's check them out.

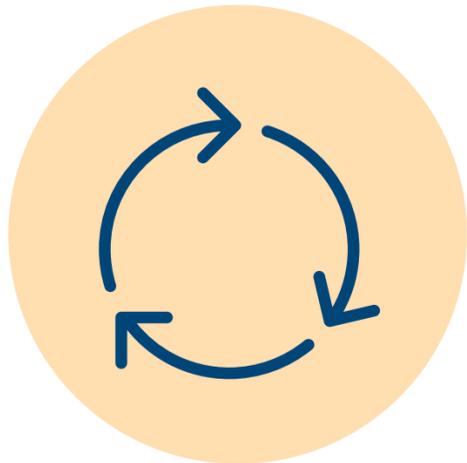
The Key Stages in Your Customers' Journey



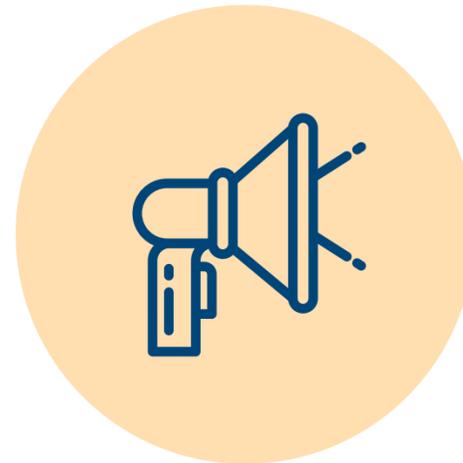
Onboarding



Adoption



Relationship



Advocacy



Onboarding

Hooray! You have a new customer, and now it's time to onboard them. This is a critical part of the customers' journey and will help set them up for success.

Main Focus Points

Show value.

You want your customers to understand your product or service's value right from the start, so they'll be inclined to use it.

Hands-on approach.

Initiate frequent contact with the customer during their onboarding phase. Provide information and highlight features that can help the customer.

Set goals.

Work with your customer on a joined purpose, and see how your product can help achieve that goal.

Top Stages • Onboarding

Guiding Questions

- 1. What are your current metrics and KPIs for success?**
- 2. What are your short and long term goals regarding using our product?**
- 3. What features or abilities were missing in past tools and services you've used?**

Top Stages • Onboarding

Understand customers' needs and issues.

Talk to the customer about what they're trying to achieve, and help understand how your product can help.

Define success and manage expectations.

For you and your product to provide value, you need to understand what the customer defines as success. Work together on clarifying it.

Build a relationship with the entire team.

Know who's your champion, meet the team and let them know that you're there for their every need, and are willing to invest in helping them succeed.



Adoption

Your customer is active and familiar with the product. Now it's time to make sure that it meets their needs.

Main Focus Points

Usage & conversational data.

Keep track of how the customer is using the product or service, and talk to them to gain more insight. Understand and acknowledge their issues to ensure better adoption.

Educate.

Reach out to the customer and encourage them to use the product. Help them discover additional abilities, features, etc.

Net Promoter Score.

It's never too early to ask the customer if they're happy. Initiate communication, ask qualitative questions and analyze support tickets to get the complete picture of their current status.

Top Stages • Adoption

Guiding Questions

- 1. How would you rate our onboarding and training process?**
- 2. Which feature or element best serves you and your team?**
- 3. What can we do to improve your experience with the product?**

Top Stages • Adoption

Form a habit.

Make sure your customer understands how to use the product, and follow up on the usage data.

Become proactive.

Take note to reach out to the customer every now and then, ask them guiding questions and make sure they're happy and on the right track.

Explore.

If possible, invest some time exploring similar customers' patterns to understand what's working for them, and apply it to other customers as well.



Relationship

Your relationship with the customer should be cared for and taken care of from day one. As time goes by, it's easier to establish a good relationship and keep improving it.

Main Focus Points

Communication.

Don't wait for your customer to reach out to you. Initiate conversation and regular check-ups to remind them that you're always available for them.

Ask questions.

Whether through surveys, emails, or phone calls, make sure you ask the customers whether they're satisfied with the product or service.

Follow up.

Based on the customers' answers, offer your help and support as much as needed. Show them you're on their side and are willing to work hard for them.

Top Stages • Relationship

Guiding Questions

- 1. How happy are you with our product and services?**
- 2. What can we do to serve your needs better?**
- 3. How likely are you to recommend our product and services to your friends and colleagues?**

Top Stages • Relationship

Keep customers in the loop.

Share updates on feature progress, even if it's not all good news.

Include them.

Invite customers to participate in various initiatives such as webinars, blog posts, and other channels you're a part of.

Stay in touch.

It almost goes without saying, but you need to make sure you communicate with your customers regularly, officially and casually.

Advocacy

Your customer is happy with both you and your product. It's time for them to spread the word, become your ambassador, and help promote you across their network.



Main Focus Points

Engagement.

Set specific actions or milestones of engaging with the product as indicators to establish whether the customer could be an advocate.

Net Promoter Score.

Keep track of your customers' happiness to determine whether they're the right fit for your advocacy initiative.

Alignment.

It's essential to align your team's goals with those of the customer and work together to achieve those.

Top Stages • Advocacy

Guiding Questions

- 1. Do you have additional feedback or comments towards us?**
- 2. What changed and improved for you and your team once you started using our product?**
- 3. Which feature or element best serves you and your team?**

Top Stages • Advocacy

Engage with your community.

If you have an active community of advocates, share it with the customer, and share their story and excitement across all channels.

Enable the customer.

Send one-liners, infographics, and any information in a way that'll make it easy for them to share and spread the word.

Communicate and celebrate.

Keep in touch with the customers, share success stories, and keep them on board with any new prospects or customers they helped onboard.

Good luck on your journey!

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