



# COMMUNITY

PEER BRAINSTORM SERIES

Customer Success Program





## Problem Statement

Identifying the problem is the first step in any brainstorming process. This typically begins in our social feed in the form of a post, from which we form an official “problem statement.” It’s important to choose a problem statement that is non-rhetorical and is inviting of new ideas. These often start with the phrase “how might we...”



Kevin posted an update

This friday I will be doing a workshop with our friends over at Lifecycle Insights to brainstorm and prioritize ideas around customer success and retention. I'm hoping you all can help me get a few ideas on the board for the problem statement: "How might we improve our customer success?"

Our problem statement:

How might MSPs improve their customer success?



## Brainstorming Ideas



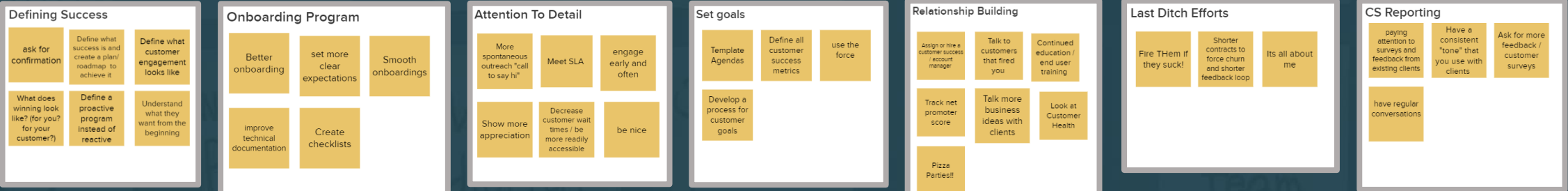
Once we have our problem statement defined, we create a brainstorm mural to allow community members to contribute their ideas. We try to collect as many ideas as possible so that the feedback is diverse. Once we have enough ideas in our mural, we schedule a session to vote on the ideas and prioritize them.

- 1 Better onboarding
- 2 use the force
- 3 Over-communicate
- 4 paying attention to surveys and feedback from existing clients
- 5 have regular conversations
- 6 set more clear expectations
- 7 Talk more business ideas with clients
- 8 What does winning look like? (for you? for your customer?)
- 9 Define what success is and create a plan/roadmap to achieve it
- 10 Develop a process for customer goals
- 11 Define all customer success metrics
- 12 Fire THEM if they suck!
- 13 Segment your client base to understand communication cadence
- 14 Assign or hire a customer success / account manager
- 15 More spontaneous outreach "call to say hi"

During this brainstorm session, we processed over 47 ideas. There were 22 participants who each received 10 votes to indicate the ideas that they thought would be of highest priority. Of the 47 ideas, 31 of them received at least one vote. "Better Onboarding" was the highest voted idea which received over double the number of votes than the next highest option. Here are the fifteen top ranked votes ranked in order of the number of votes they received.

# Grouping Ideas

After the ideas have been voted on and we filter out those that received no votes, we begin to group ideas together to find common themes and form more complete concepts. These groups can consist of ideas that are similar, or those that complement each other and can be combined to form something new.



This group includes ideas related to the definition of success.

This group includes ideas related to new customer onboarding.

This group includes ideas related to less obvious details.

This group includes ideas related to establishing benchmarks.

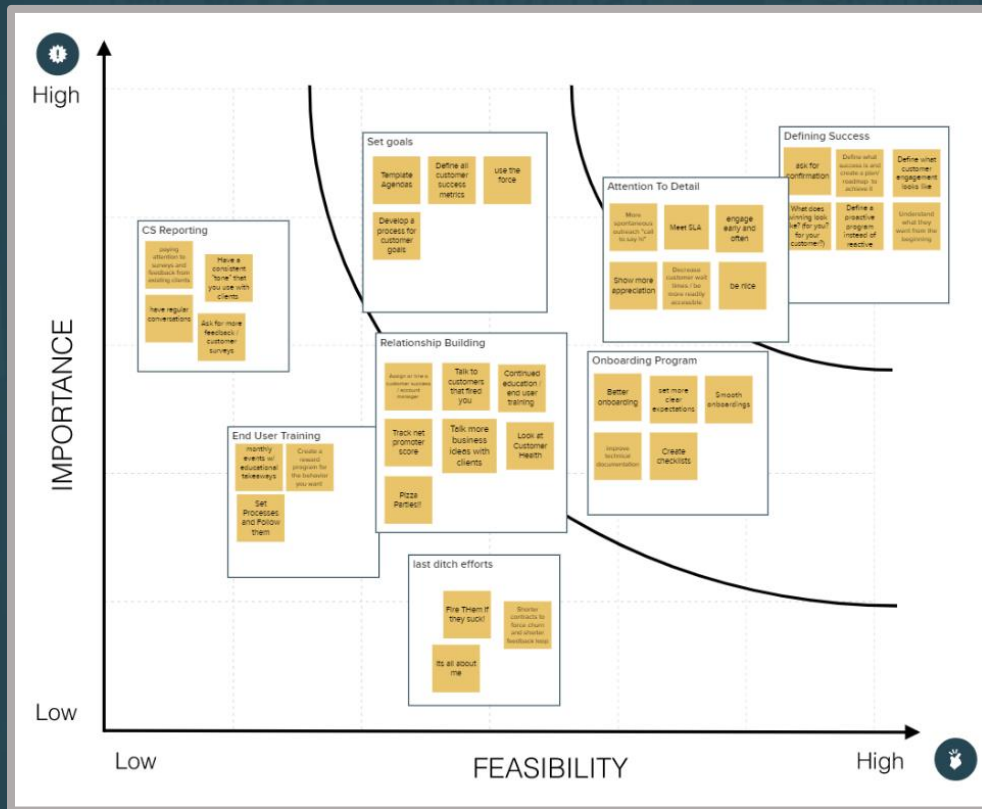
This group includes ideas related to managing relationships.

This group includes ideas that have a low probability of success.

This group includes ideas related tracking and analyzing KPIs.

## Idea Prioritization

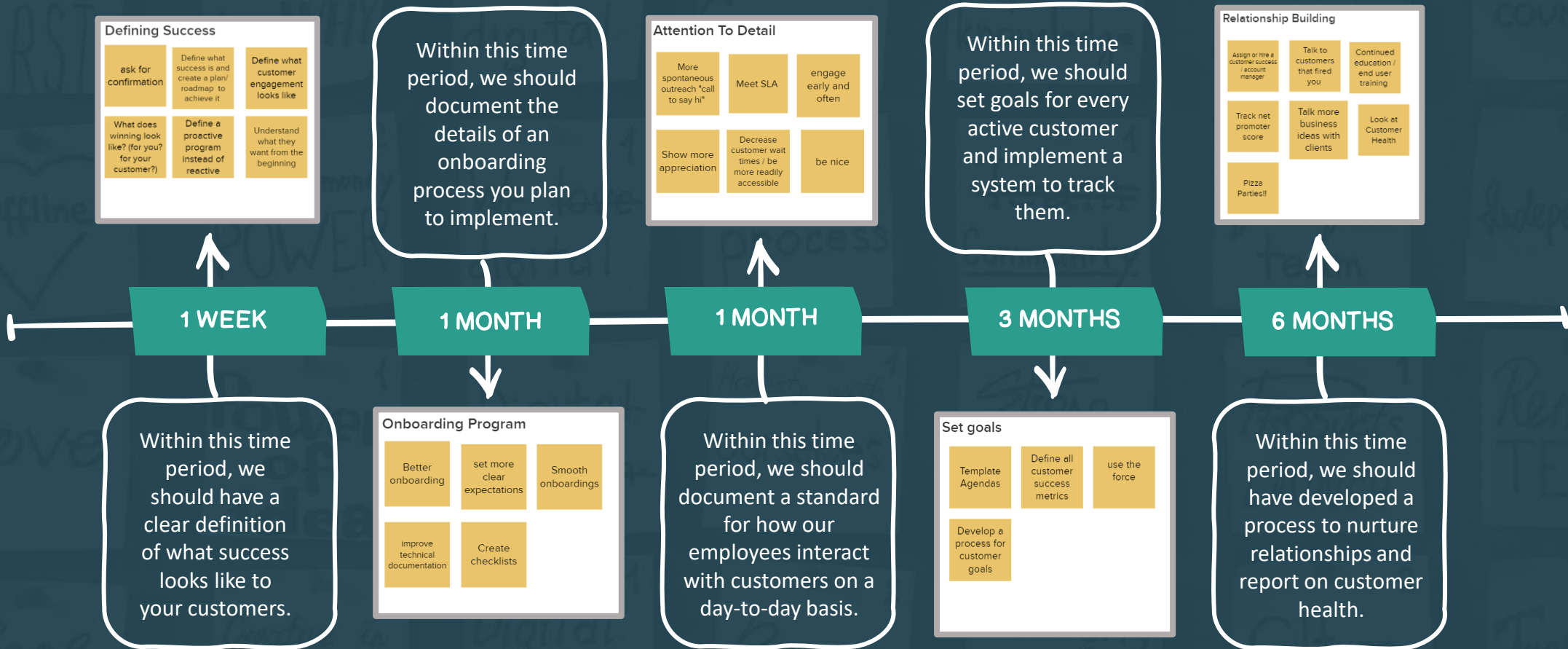
After grouping our ideas together to form a select few, more rounded concepts, we begin the process of charting these to prioritize them based on feasibility and importance. This is to help us break the habit of only working on the ideas that are the “low hanging fruit” or the ones that may be important but just aren’t feasible.

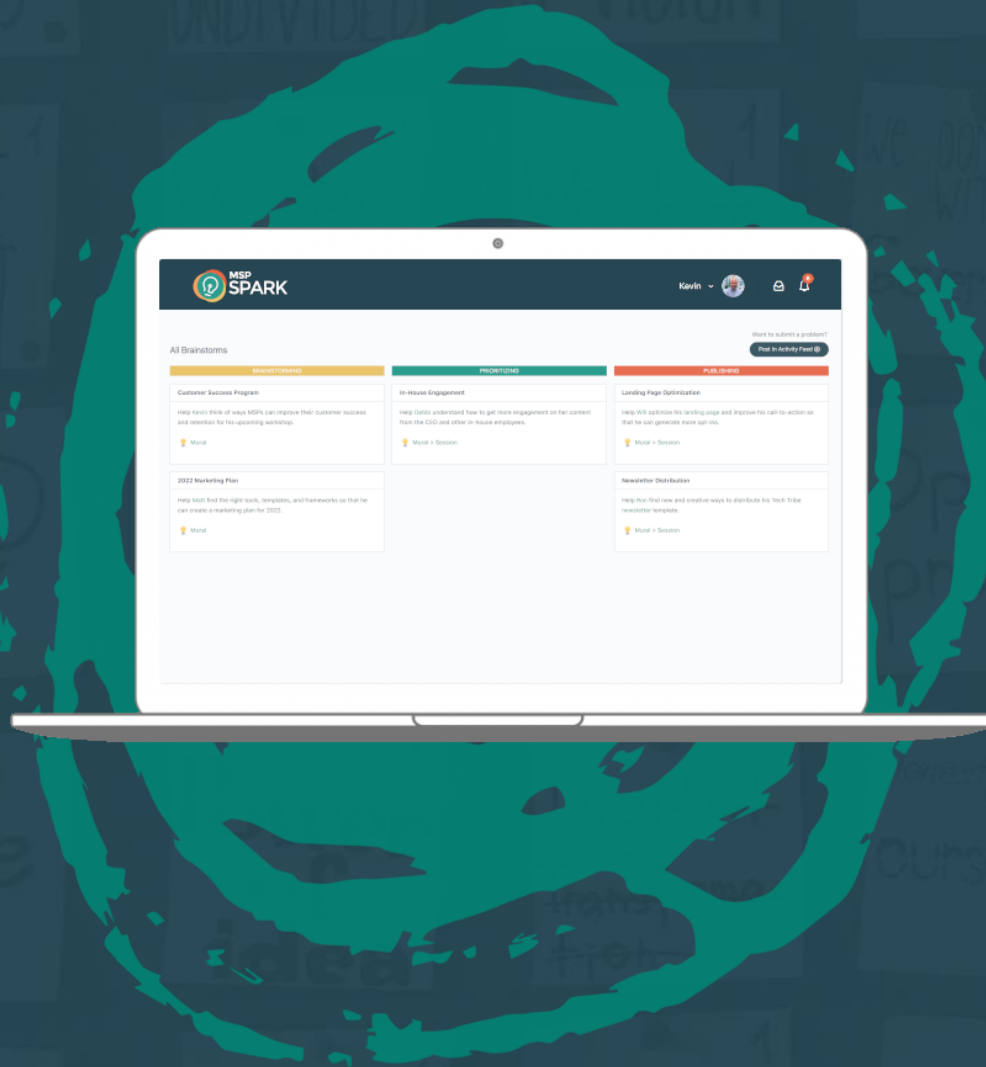


- We thought that answering the question of “what does success look like?” would be the most feasible and important first step.
- While culture can’t be built overnight, we thought that establishing a guideline for customer interactions would act as an insurance policy for the success of our efforts.
- While “better onboarding” was the highest voted idea, it turned out that this was not as high of a priority in the short term as we expected. We agreed that you can overcome a bad onboarding, but some of our other groups were ultimately required for success.
- Many agreed that setting goals was one of the most important requirements for success but since each customer has a different definition of success, this was not as feasible as we initially thought.

# Goal Milestones

After prioritizing our ideas, we then select up to 4 concepts to move forward with and place them into our timeline as milestones. This now becomes our roadmap for executing on these ideas and setting realistic goals.





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