

VENMATE customer success onboarding playbook

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Purpose of this document

This playbook is designed for Customer Success professionals in the B2B SaaS industry to enhance collaboration, streamline onboarding, and provide exceptional client service. This playbook includes: steps in onboarding high touch and low touch clients, e-mail templates for crucial touchpoints and summaries until the customer is fully onboarded and live, a project plan with suggestions on how to measure success each step of the onboarding, a comprehensive analysis of playbooks and automations, a feedback survey, and advice on quarterly business reviews.

Onboarding template high touch clients

High touch onboarding is for clients with complex needs requiring close interaction.

Key steps:

1. Kick-off meeting: Align goals and set expectations.
2. Account configuration: Set up accounts, roles, and integrations.
3. Customized training: Deliver tailored training sessions.
4. Regular check-ins: Bi-Weekly progress updates to ensure alignment. (Here it's important to define the amount of time until your customers enter the "full go live phase" within the customer journey)
5. Success planning: Define metrics and success criteria.
6. New phase: Full "go live". Check-ins include mostly QBRs (Quarterly Business Reviews)

Email templates

1. Welcome email:

Subject: Welcome to [your product/service]!

Dear [client name],

Welcome aboard! We're thrilled to have you with us. Please find below the next steps to get started:

1. Log in to your account using [link].
2. Schedule your onboarding session using [link].

Feel free to reach out to me or our support at [support email] if you have any questions.

Best regards,

[your name]

2. Kick-off invite email:

Hi [client name],

We are excited to start our journey together! We'd like to invite you to your VENMATE kickoff meeting, where we will align on your goals and discuss the onboarding process.

Please find the agenda below:

1. Introductions: Introduce team members and roles.
2. Walkthrough: Provide a demo or overview of the product.
3. Review objectives: Confirm goals and key performance indicators (KPIs).
4. Timeline: Discuss implementation timelines and milestones.
5. Next steps: Define immediate actions and responsibilities.

Please use the following link to schedule the kickoff meeting at your earliest convenience:
[link].

Looking forward to meeting with you!

Best regards,

[your name]

3. Kick-off follow-up email:

Subject: Follow-up kick-off meeting

Hi [client name],

Thank you for taking the time to meet with us! It was great to discuss your goals and the steps ahead.

Here's a quick summary of what we covered:

1. Objectives: [insert details]
2. Timeline: [insert details]
3. Next Steps: [insert details]

Please let us know if there are any additional questions. Looking forward to working closely with you!

Best regards,
[your name]

4. Onboarding follow-up email:

Subject: Checking in after onboarding

Hi [client name],

I hope this email finds you well. We wanted to check in after your onboarding to see how everything is progressing.

If you have any feedback or need additional assistance, please let us know. We'd appreciate it if you could take 5 minutes to fill out our feedback form [link] to make sure we're serving you as best as possible!

Looking forward to your success!

Best regards,
[your name]

Project plan high touch

Milestone	Timeline	Success metric	Measurement recommendation
Account setup and role assignment	Week 1	All accounts and roles are successfully set up.	Verify through a checklist and client sign-off.
Kick-off meeting and goal alignment	Week 2	Client confirms clear goals and expectations.	Ask the client post-meeting for alignment clarity.
Custom training sessions begin	Week 3-4	Training sessions receive positive feedback and understanding of usage / value.	Conduct a feedback survey after training/onboarding.
First check-in to address early challenges	Week 5	Early challenges identified and resolved.	Track resolution rates and client satisfaction scores.
Bi-weekly check-ins for additional support	Ongoing	High satisfaction during regular reviews.	Monitor NPS (Net Promoter Score) or CSAT (Customer Satisfaction Score) after check-ins.
Next phase: full go live	Individual	Positive development of success metrics and outcomes.	Regular QBRs (Quarterly Business Reviews). Continue documenting metrics and get client approval through monthly check-in.

Onboarding template low touch clients

Low touch onboarding is designed for a large volume of clients with standard or simpler requirements in a scalable manner.

Key steps:

1. Welcome email: Provide access and resources.
2. Standardized training: Share recorded sessions and guides.
3. Support resources: Offer FAQs and chat support.
4. Progress updates: Send automated progress reports.

Email templates

1. Welcome email:

Subject: Welcome to [your product/service]!

Dear [client name],

Welcome aboard! We're thrilled to have you with us. Please find below the next steps to get started:

1. Log in to your account using [link].
2. Schedule your onboarding session using [link].

Feel free to reach out to me or our support at [support email] if you have any questions.

Best regards,

[your name]

2. Provision of self-onboarding materials

Subject: Training materials for your onboarding

Hi [client name],

I hope all is well! Please find your onboarding materials

Happy onboarding! Feel free to reach out to our support in case you come across any challenges within the process. We're here to help.

Best regards,

[your name]

Let's talk if you want to learn how to leverage VENMATE to unlock more time for your CSMs: [Speak to Leopold](#).

3. Onboarding follow-up email:

Subject: Checking in after onboarding

Hi [client name],

I hope this email finds you well. Now that you have onboarded successfully, we wanted to check in after your onboarding to see how everything is progressing.

If you have any feedback or need additional assistance, please let us know. We'd appreciate it if you could take 5 minutes to fill out our feedback form [link] to make sure we're serving you as best as possible!

Looking forward to your success!

Best regards,

[your name]

4. Check-in after X months

Subject: X-month progress update

Hi [client name],

I hope this email finds you well. We wanted to share the progress you've made with [your product/service]. In the past X months you have [insert success metrics] by using [your product/service]. Has there been any challenges along the way? If so, please report them and let us know how we can help.

Curious about other plans you can book to level up your [value proposition of your product/service]? Book a meeting with our sales representative [link] to find out more.

We are happy to continuously work on your success!

Warmest,

[your name]

Project plan low touch

Milestone	Timeline	Success metric	Measurement recommendation
Welcome email and access setup	Week 1	Client accesses their account successfully.	Check login activity and confirm account setup.
Share standardized training materials	Week 1	Client confirms receipt of materials.	Email acknowledgment from the client.
Follow-up for feedback and questions	Week 2	Client feedback is addressed promptly.	Measure response time and resolution quality.
Confirm onboarding completion and next steps	Week 3	Client agrees onboarding is complete and value is perceived.	Obtain written confirmation or feedback.
Monthly or quarterly updates via automated emailing	Ongoing	Positive development of success metrics and outcomes.	Monitor client retention rate and periodic CSAT / NPS scores (quarterly/yearly).

Playbooks: Automations & best practices for customer success

Introduction to playbooks

In Customer Success Management (CSM), playbooks serve as essential tools for standardizing processes, automating routine tasks, and ensuring that best practices are consistently applied across teams. A playbook is a detailed guide that outlines the specific steps, actions, and automations to be followed in various customer scenarios, such as onboarding, renewal, and issue resolution. By implementing well-designed playbooks, CSM teams can improve efficiency, enhance the customer experience, and drive better outcomes.

Why playbooks are crucial in customer success

Playbooks are critical for several reasons:

- **Consistency:** Playbooks ensure that all team members approach common situations in a uniform way, leading to a consistent customer experience.
- **Efficiency:** By automating routine tasks within playbooks, CSMs can save time and focus on more strategic activities.
- **Scalability:** Playbooks make it easier to onboard new CSMs, as they provide clear guidelines and procedures that can be followed from day one.
- **Data-driven decisions:** Playbooks help standardize the collection and use of data, leading to more informed decision-making and better customer outcomes.

Core components of a playbook

To create an effective playbook, it's essential to include several key components that guide CSMs through each customer interaction, ensuring that all actions are aligned with best practices. Depending on your use case you can have a playbook for each step along your customer journey and your various customer segments.

1. Customer/User journey mapping

A successful playbook begins with a clear understanding of the customer journey. Mapping out the key stages of this journey - such as onboarding, adoption, renewal, and expansion - allows you to identify where specific actions or interventions are needed.

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Key elements:

- **Journey stages:** Break down the customer journey into its key stages and identify the desired outcomes at each stage.
- **Touchpoints:** Define the critical touchpoints where CSMs should engage with customers to drive success.
- **Milestones:** Establish milestones that indicate customer progress and success, which can trigger specific actions within the playbook.

2. Automation triggers

Automation is a central feature of modern playbooks. By automating routine tasks and responses, CSMs can ensure timely and consistent engagement with customers without manual intervention.

Key elements:

- **Task automation:** Automate repetitive tasks such as sending welcome emails, scheduling follow-up meetings, or reminding customers of upcoming renewals.
- **Trigger points:** Identify specific trigger points, such as a customer reaching a usage milestone or submitting a support ticket, which will activate the relevant playbook actions.
- **Personalization:** Use data-driven insights to personalize automated interactions, ensuring that customers receive relevant and timely communications.

3. Step-by-step procedures

Each playbook should include detailed, step-by-step procedures that CSMs can follow in various scenarios. These procedures should be clear, concise, and easy to execute.

Key elements:

- **Actionable steps:** Break down each process into actionable steps, with clear instructions on what needs to be done, who is responsible, and when it should be completed.
- **Decision trees:** Incorporate decision trees that guide CSMs through complex situations, helping them determine the best course of action based on customer responses.

- **Resource links:** Provide links to relevant resources, such as templates, FAQs, or training materials, to support the execution of each step.

4. Best practices and guidelines

To ensure that playbooks are aligned with industry standards and company goals, they should be grounded in best practices. These guidelines help CSMs apply the most effective strategies in their interactions with customers.

Key elements:

- **Industry standards:** Incorporate industry best practices that align with your company's goals and customer success metrics.
- **Company policies:** Ensure that playbooks adhere to company policies regarding customer interactions, data handling, and confidentiality.
- **Continuous improvement:** Encourage CSMs to contribute feedback and suggestions for improving playbooks, fostering a culture of continuous improvement.

5. Metrics and KPIs

Measuring the effectiveness of your playbooks is essential for ensuring they deliver the desired outcomes. Define the key performance indicators (KPIs) that will be used to evaluate success and guide improvements.

Key elements:

- **Success metrics:** Establish clear metrics that align with customer success goals, such as time to value, customer satisfaction scores, or renewal rates.
- **Data collection:** Integrate data collection into the playbook process, ensuring that relevant metrics are captured at each stage of the customer journey.
- **Reporting:** Set up regular reporting and review processes to track the effectiveness of playbooks and make necessary adjustments based on performance data.

Best practices for creating and implementing playbooks

To maximize the effectiveness of your playbooks, it's important to follow best practices in their creation and implementation.

1. Collaborate across teams

Playbooks should be developed in collaboration with other teams, such as Sales, Marketing, and Product, to ensure that they are comprehensive and aligned with overall business objectives.

Best practices:

- **Cross-functional input:** Involve key stakeholders from different departments in the playbook creation process to ensure all perspectives are considered.
- **Feedback Loops:** Establish feedback loops where CSMs can share insights and experiences with other teams, leading to continuous improvement of playbooks.

2. Keep playbooks up-to-date

The needs of customers and the tools available to CSMs are constantly evolving. Regularly reviewing and updating playbooks ensures they remain relevant and effective.

Best practices:

- **Regular reviews:** Schedule regular reviews of all playbooks to assess their effectiveness and make updates as needed.
- **Version control:** Implement a version control system to track changes to playbooks and ensure that all team members are using the most current version.

3. Provide comprehensive training

For playbooks to be effective, CSMs need to be thoroughly trained on how to use them. This training should cover both the technical aspects of using automation tools and the strategic rationale behind each playbook.

Best practices:

- **Training programs:** Develop training programs that cover the use of playbooks, including case studies and role-playing exercises to reinforce learning.

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- **Ongoing support:** Provide ongoing support and resources, such as Q&A sessions or internal forums, where CSMs can seek help and share best practices.

4. Monitor and optimize performance

Regular monitoring of playbook performance is crucial for ensuring they are meeting their objectives. Use data and feedback to continuously optimize playbooks and improve customer outcomes.

Best practices:

- **Performance dashboards:** Set up dashboards that provide real-time insights into the performance of playbooks, allowing for quick adjustments.
- **Customer feedback:** Incorporate customer feedback into the playbook optimization process, ensuring that playbooks are aligned with customer needs and expectations.

Challenges in implementing playbooks

While playbooks offer many benefits, they also present challenges that need to be addressed to ensure success.

1. Balancing automation with personalization

While automation is a key feature of playbooks, it's important not to sacrifice personalization in customer interactions. Striking the right balance is crucial for maintaining strong customer relationships.

Strategies:

- **Personalized automation:** Use customer data to personalize automated messages, ensuring that they feel relevant and tailored to the individual.
- **Human Touchpoints:** Include touchpoints where CSMs can add a personal touch, such as a follow-up call after an automated email.

2. Ensuring playbook adoption

For playbooks to be effective, they must be adopted and used consistently by all team members. Resistance to change or lack of training can hinder adoption.

Strategies:

- **Incentives:** Offer incentives for CSMs who consistently use and contribute to the improvement of playbooks.
- **Clear communication:** Clearly communicate the benefits of playbooks to the team, emphasizing how they enhance efficiency and customer success.

Post-onboarding feedback survey

Introduction

Collecting feedback after the onboarding process allows us to improve our approach and better serve our customers. Please share this survey with your clients once they have completed their onboarding period. Use the insights to refine internal processes, enhance training materials, and continuously improve client satisfaction with VENMATE. We can recommend typeform and googleforms to easily set up and send out a survey.

Survey questions

1. How would you describe the clarity of the onboarding process for using VENMATE?
Written answer possible.
2. Did the resources provided (guides, recorded sessions, help articles) meet your needs and help you understand the product features? We recommend using a likert scale from 1-5.
3. How satisfied are you with the communication frequency and responsiveness of the VENMATE customer success team? We recommend using a likert scale from 1-5.
4. Did you feel that your goals and expectations were clearly understood and addressed throughout the onboarding period? We recommend using a likert scale from 1-5.
5. What aspects of the onboarding experience were most valuable to you and why? Written answer possible.
6. What could we improve in our onboarding approach to better support your success with VENMATE? Written answer possible.
7. How likely are you to recommend VENMATE to others based on your onboarding experience? We recommend using a likert scale from 1-5.
8. Anything to add? What did you like / dislike? Written answer possible.

Quarterly business reviews

The Power of QBRs: Leveraging Quarterly Business Reviews for customer success



In the ever-evolving landscape of customer success, businesses are constantly seeking effective ways to nurture and strengthen their partnerships. Among the arsenal of strategies, Quarterly Business Reviews (QBRs) stand out as a potent tool for fostering collaboration, assessing progress, and aligning objectives. As we delve into the realm of QBRs, we uncover their significance, intricacies, and potential to accelerate businesses toward sustainable growth and success.

What is a Quarterly Business Review (QBR)?

At its core, a Quarterly Business Review is a structured meeting held between a company and its customers, typically on a quarterly basis. Unlike routine status updates or technical discussions, QBRs focus on delivering value and deepening relationships. These sessions provide an opportunity for both parties to evaluate performance, discuss goals, and strategize for the future. By delving into metrics, accomplishments, and challenges, QBRs offer a holistic view of the partnership's health and progress.

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Why are QBRs important for customer success?

The importance of QBRs cannot be overstated in today's competitive business landscape. These meetings serve as a conduit for forging stronger connections, fostering trust, and showcasing the tangible impact of products or services. By engaging in open dialogue with your customers and aligning objectives, QBRs lay the groundwork for long-term success and positive relationships. Moreover, they empower businesses to stay agile, adapt to changing needs, and drive mutual growth. Ultimately, QBRs transcend mere transactions, evolving into strategic collaborations that fuel success for all parties involved.

How to do QBRs

- **Preparation:** Thorough preparation is key to a successful QBR. Set clear objectives, gather relevant data, and create a structured agenda.
- **Attendees:** Ensure representation from both your team and the client's side, including key decision-makers and stakeholders.
- **Review performance:** Begin by analyzing performance metrics and highlighting achievements since the last review.
- **Discuss goals:** Engage in a collaborative discussion about future objectives, challenges, and opportunities.
- **Develop action plan:** Outline actionable steps, responsibilities, and timelines to drive progress.
- **Follow-up:** Conclude the meeting by scheduling follow-up actions and setting the stage for the next QBR.

Advice to consider

- **Personalization:** Tailor each QBR to the specific needs and goals of the client, fostering a personalized experience.
- **Data-driven insights:** Leverage data and metrics to substantiate claims, demonstrate ROI, and identify areas for improvement.
- **Communication:** Foster open communication and transparency, encouraging feedback and addressing concerns proactively.
- **Relationship building:** Focus on building rapport and trust, positioning yourself as a trusted advisor rather than a mere vendor.
- **Continuous improvement:** Embrace a culture of continuous improvement, learning from each QBR to refine strategies and approaches.

What not to do

- **Neglect preparation:** Avoid entering QBRs unprepared, as it can undermine credibility and diminish the effectiveness of the meeting.
- **Overlooking engagement:** Steer clear of monotonous presentations or one-sided discussions; instead, prioritize engaging dialogue and collaboration.
- **Ignoring feedback:** Refrain from dismissing feedback or criticism; instead, embrace it as an opportunity for growth and improvement.
- **Extending beyond scope:** Keep QBRs focused and concise, avoiding unnecessary tangents or discussions unrelated to the agenda.
- **Failing to follow-up:** Ensure timely follow-up on action items and commitments made during the QBR, reinforcing accountability and progress.

Conclusion

In the realm of modern business, Quarterly Business Reviews emerge as a powerful catalyst for growth, collaboration, and success. By embracing the principles of preparation, engagement, and continuous improvement, businesses can harness the full potential of QBRs to nurture meaningful partnerships and drive mutual prosperity. As organizations navigate the dynamic landscape of customer relations, the power of QBRs remains an indispensable asset in the pursuit of sustainable growth and excellence.

For more information on VENMATE feel free to visit our [website](#) or follow us on [LinkedIn](#).