

The Marketer's Guide to Customer-Led-Growth



*A framework, examples,
templates and tools
shared by Eran Livneh*

What's in this guide?

- Why Customer-Led-Growth?
- What can you do to drive Customer-Led-Growth?
- How to measure success
- Planning tools and templates

My goal in this guide is to provide you with a framework, not a recipe. I hope it helps you think about the critical milestones in your customer lifecycle and how marketing can add value at each stage. It should help you bring to the forefront the needs of the different customer personas and the ways you can help each of them achieve their goals using a range of programs that leverage data, content, community, and advocacy - all forms of engagement that marketing is uniquely positioned to deliver. And last but not least, I've included templates and tools you can use to analyze customer data so you can prioritize your plans and measure their impact on revenue growth. After all, this is all about Customer-Led-Growth!



Why Customer-Led-Growth?



The next board meeting

Even if you are not part of the next board meeting, you can bet these two questions will be asked:

- 1. What are you doing to protect your revenue projections?*
- 2. How are you cutting costs?*

With valuations down, companies are under pressure to deliver not only growth, but also a path to profitability.

Sustainable growth is the name of the game today!



Image by wayhomestudio on Freepik

Luckily, Customer-Led Growth provides a great answer to both of these questions by:

- Increasing customer retention
- Increasing upsell & expansion
- Leveraging customer advocacy to support new logo acquisition

Read on to see how!

What do investors value?

Retention and expansion revenues are key performance indicators for SaaS companies.

| KPIs to Measure | | | |
|--|--|--------------------------------------|--------------------------------|
| Early Stage < \$10M ARR | Win Rate | New & Expansion Bookings Growth Rate | NPS & Gross Revenue Retention |
| Mid Stage \$10M - \$100M ARR | Customer Acquisition Cost (CAC) & CAC Payback | Net Revenue Retention (NRR) | New vs. Expansion Bookings Mix |
| Late Stage \$100M ARR | Sales & Marketing Expense as a Percentage of Revenue | Quota Attainment | SaaS Quick Ratio |

New MRR + Expansion MRR
Churn MRR + Contraction MRR

Why are retention and expansion so important?

Acquiring a new customer is 5-7x more expensive than retaining one.

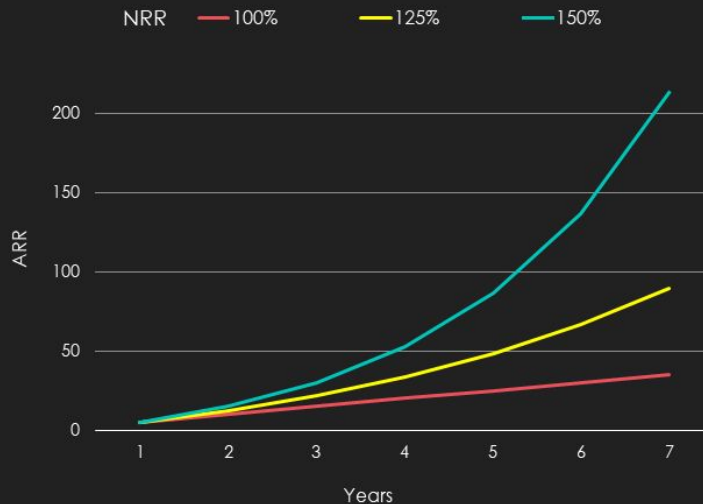
It's also easy to see how retention and expansion drive exponential growth.

For these reasons, each percentage point increase in NRR is worth an 18% increase in SaaS company valuation over five years.



NRR Impact on ARR Growth

Hypothetical scenario assuming flat new customer ARR



Best-in-class inspirations

High-growth SaaS companies have higher than average NRR.

| | NRR Pre-IPO | NRR Post-IPO |
|-----------------|-------------|--------------|
| Bill.com | 110% | 121% |
| Blackline | 112% | 106% |
| Confluent | 117% | 130% |
| Datadog | 146% | 130% |
| Okta | 121% | 123% |
| Slack | 143% | 123% |
| Snowflake | 189% | 162% |
| Twilio | 141% | 135% |
| Zendesk | 116% | 120% |
| Zoom | 130% | 130% |
| | | |
| Average: | 133% | 128% |

Marketing's role in driving retention and expansion revenues at scale

While the customer success organization plays a central role in driving value to customers, driving success at scale requires a different set of capabilities.

Customer
Success



1:1



Customer-
Led-Growth

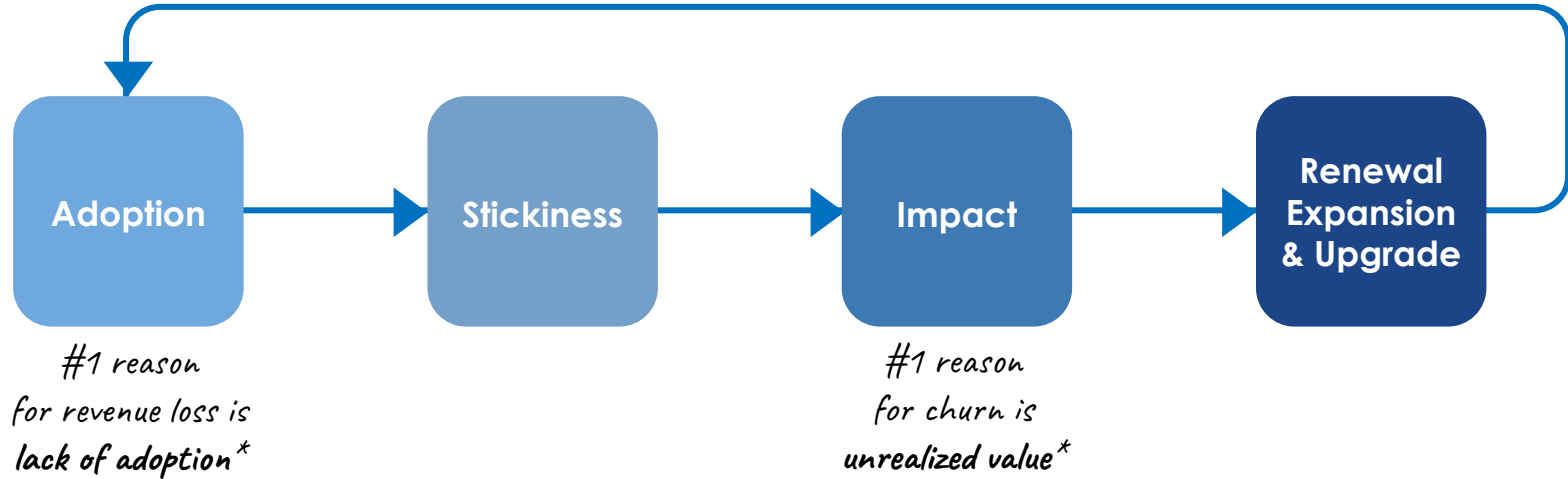
*Customer Marketing
can add scale to
Customer Success with
1:M programs, targeted
plays, and just-in-time
campaigns.*

"We have a customer marketing organization specifically focused on our installed base and how we improve the experience for them.

Marketing is the orchestrator that ties together the success team and engineering and all the different functions that have to come together to make a great customer experience."

David Meredith, CEO, Boomi

Retention and expansions are driven by the customer lifecycle experience

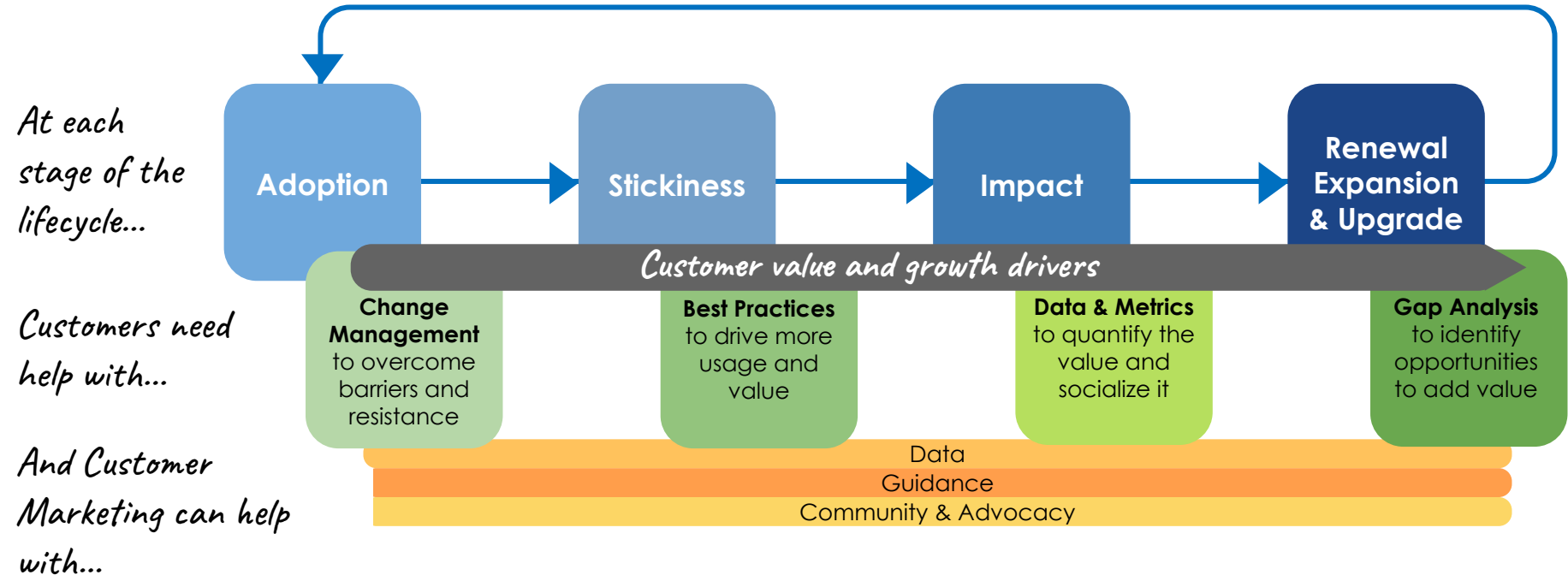




Driving Customer-Led Growth requires that we translate the “customer-first” North Star into actionable tasks and deliverables throughout the customer lifecycle.

Image by luis_moliner on Freepik

How can you drive value and growth throughout the customer lifecycle?



Driving success at scale

Three ways marketing can help customers be more successful:

Data

Share data that helps customers understand their usage and outcomes and how they can improve.

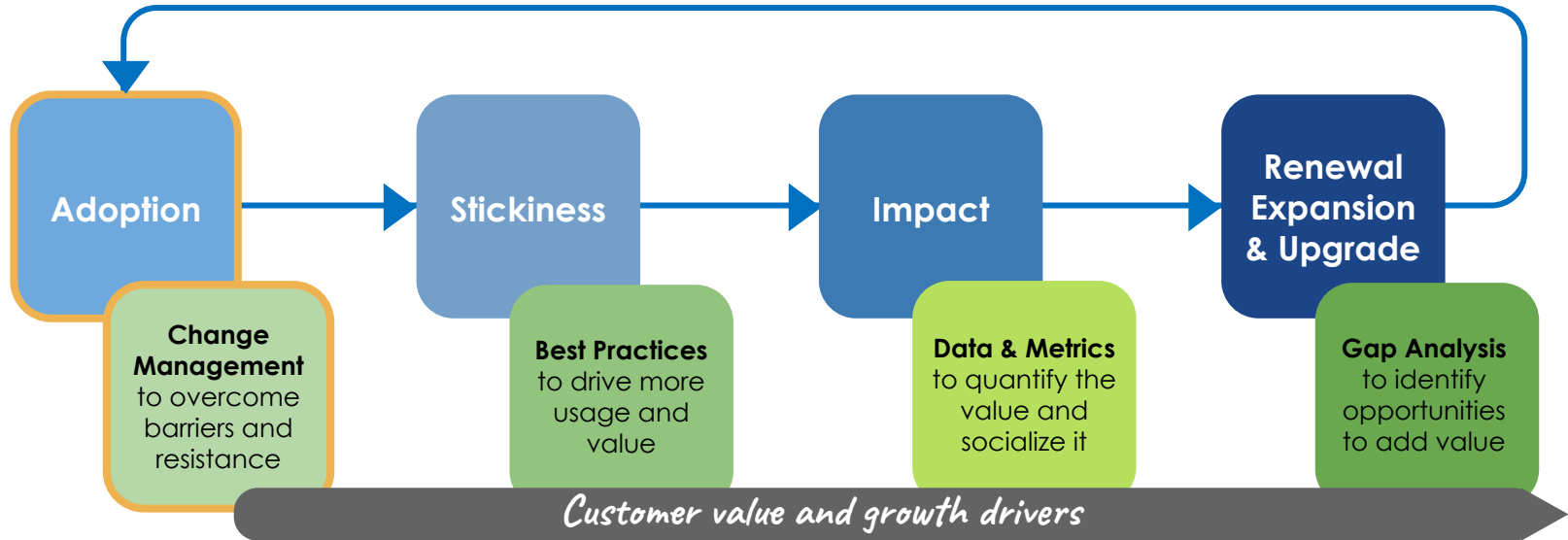
Guidance

Share content that helps customers adopt best practices.

Community & Advocacy

Create a space and opportunities for customers to learn from their peers.

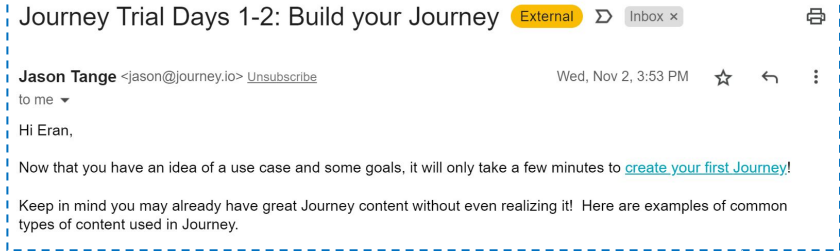
Starting with Adoption




Onboarding

“A poor onboarding experience is hard to come back from and the fastest way to lose a customer.”

Paul Philip, Founder & CEO, Amity



Content

Guide the user to get value, quickly! Here's a good example. 

Communication

Utilize multiple communication channels, e.g. in-app messaging, email, slack, community.

Community

- Create a community zone for onboarding / new users.
- Setup a welcoming committee.
- Offer a mentorship program.

If you think about adoption from the customer point of view, it is really a change management challenge.

Our view

- Implement
- Onboard
- Train
- Happy users!

User view

- The big picture: why are we doing this?
- What's in it for me?
- What is the transition process and timeline?
- What do I need to change in my day to day?
- What do we need to do differently as a team?
- What kind of support will I get?
- How will we know it's working?

Create content, plays, and community zones that help users understand the “why” and the “how” of the change they are going through.

Users, product champions, and decision makers need different types of tools to manage change.

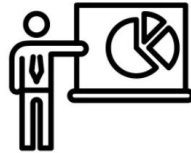


Transition FAQ

WIIFM videos

Community onboarding

User



Adoption stats

Change management guide

Adoption case studies

Champion

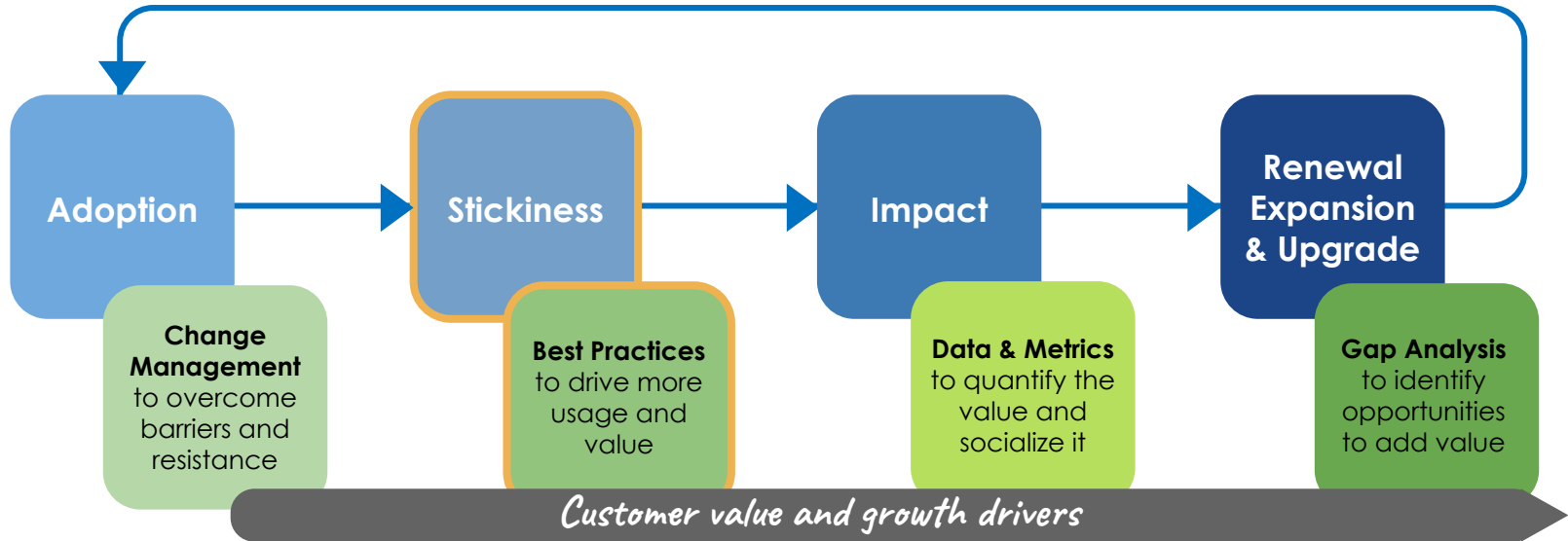


*How they are doing: Early
adoption wins*

*How others are doing:
Executive testimonials*

Decision maker

From Adoption to Stickiness



Driving stickiness and value

Stickiness is about driving more usage and value.

First and foremost, you want to make sure you deliver maximum value to the customer.

Second, you want to make your solution such a critical part of their business processes that they cannot live without it.

Here are a few user behaviors that you can impact to increase stickiness.

Frequency of use

A solution that is used multiple times a day is typically more valuable and more difficult to replace than one that is used once a week or once a month, for example.

Integration

Integration with other systems can increase product usage and make it engrained in additional business workflows.

Feature utilization

Share best practices to help users adopt features that deliver the most value.

Example: Using data to prioritize customer cohorts for stickiness plays

We analyzed the impact of using two features - in this case notification and integration - on user stickiness.

31% improvement

Daily Active Users divided by Monthly Active Users (or DAU over MAU) is a common metric for stickiness.

| | No notifications or integration | Notifications only | Integration only | Notifications + integrations |
|------------|---------------------------------|--------------------|------------------|------------------------------|
| DAU/MAU | 21% | 45% | 52% | 58% |
| % of users | 55% | 12% | 14% | 19% |

Based on this data, we can see that we can make the greatest impact by **promoting integration to those that haven't enabled either of the two features** (+31% potential improvement for 55% of the users).

Our second priority would be promoting notifications to those that have not enabled either (+24% potential improvement for 55% of the users).

Only then would it make sense to promote the second feature to those that have already enabled one of them.

Stickiness plays by persona

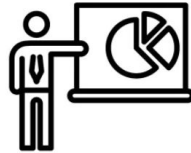


Did you know? Series

Integration nudges

Hero user stories

User



Stickiness stats

Integration guides

Product update webinars

Champion

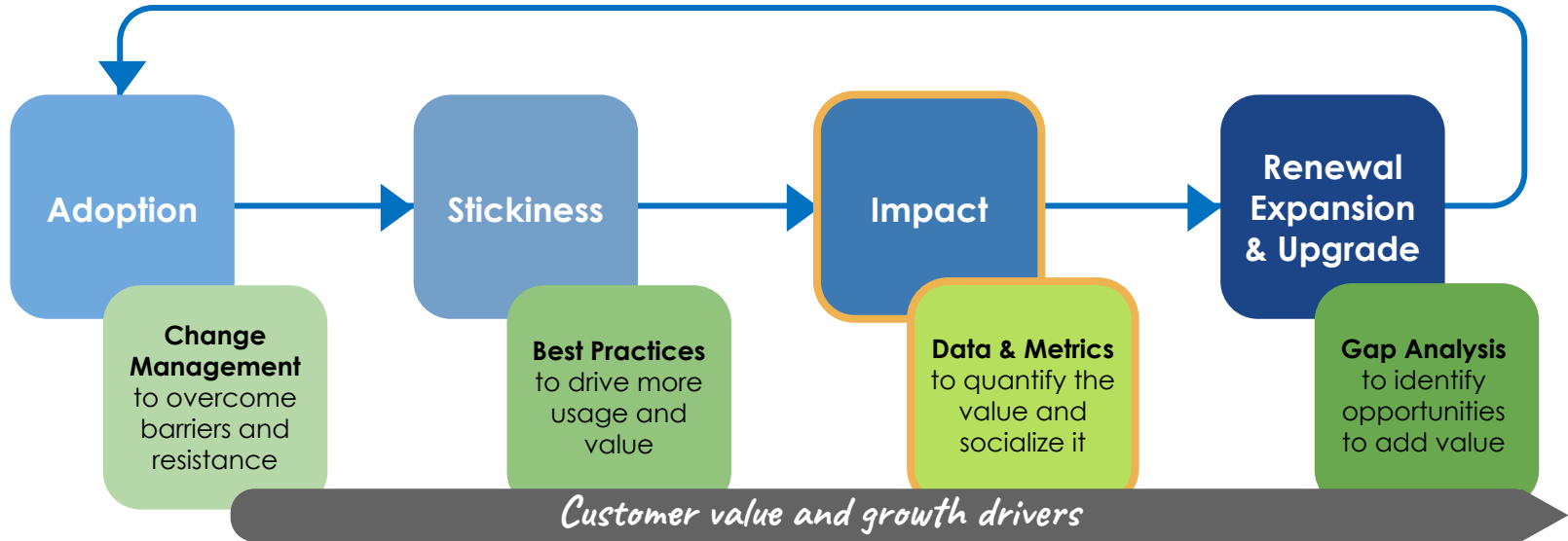


How they are doing: Early wins updates

How others are doing: Executive testimonials

Decision maker

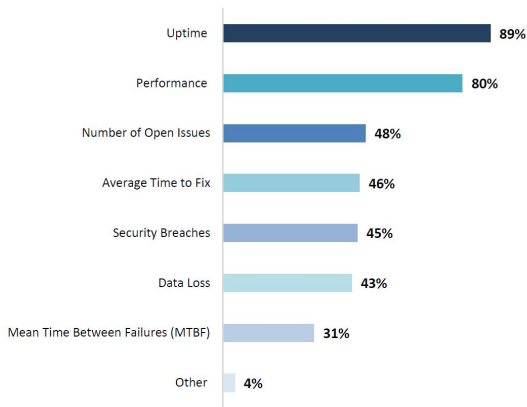
Helping customers quantify the value of your solution



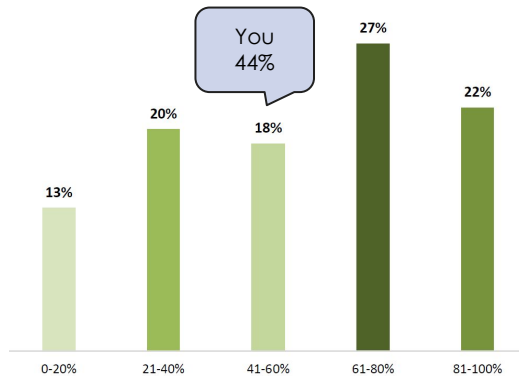
Help customers understand how to measure the value of your solution and what drives greater impact

The better customers can quantify the value of your solution, the more likely they are to renew, grow, and become effective advocates.

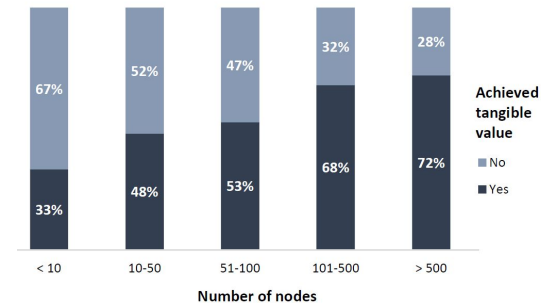
1 Survey customers and share common KPIs.



2 Show how they perform relative to benchmarks.



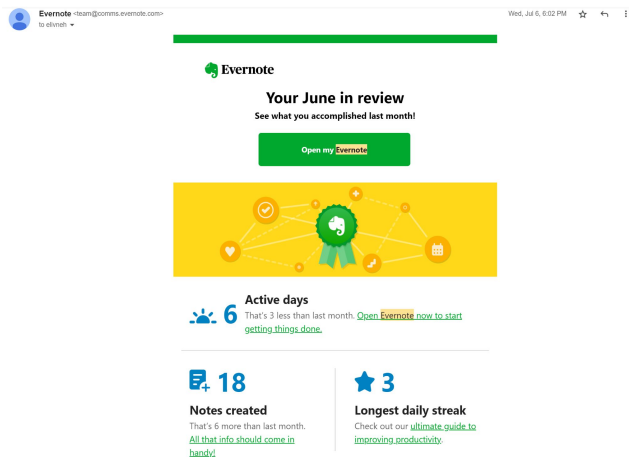
3 Show how they can improve with better/more use of your product.



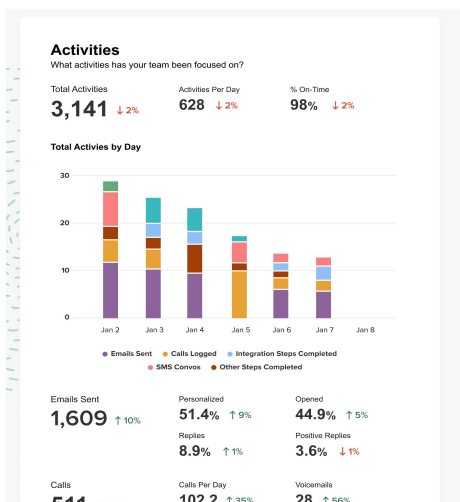
Help customers recognize the value at all levels - from users to teams and the entire organization

Seeing this data in their inbox helps customers visualize the value they get and use more quantifiable language when they describe the benefits of your solution, whether it's in a review, a reference call, or when they need to justify the budget for renewal or expansion.

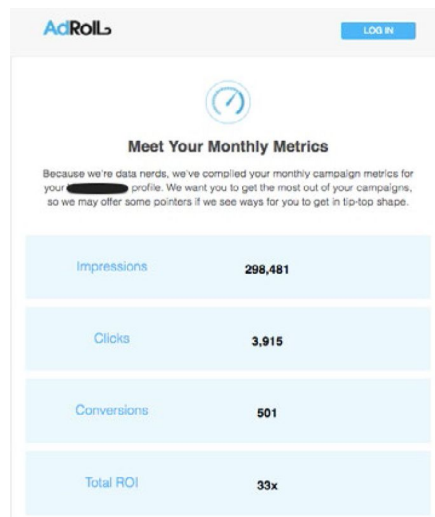
User Activity Summary



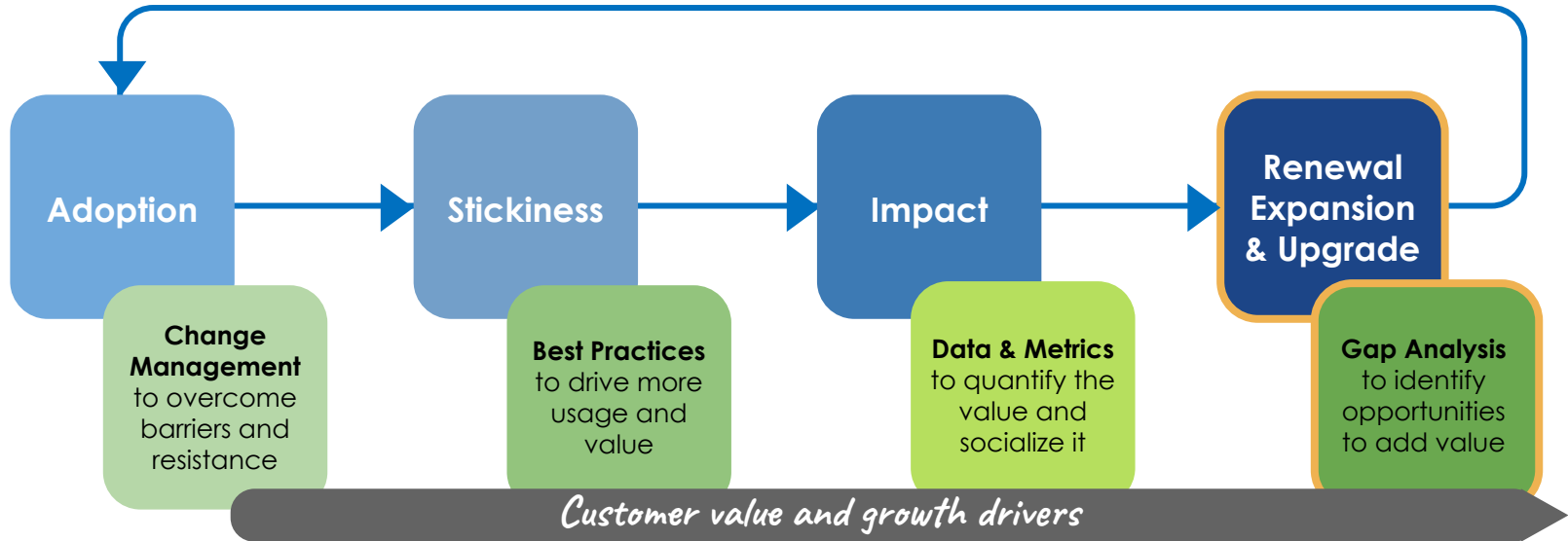
Team Performance



Organization KPIs



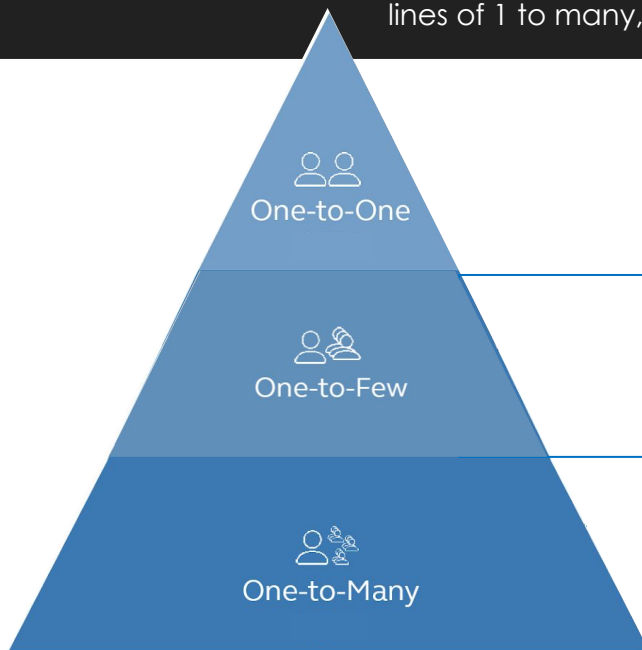
Driving renewals, expansion, and upgrades



Use ABM to structure segmented renewal, upgrade, & expansion programs

Renewals, upgrades, and expansions are sales-led activities. Since each organization has it set up differently, it could be led by account managers or account executives, but it could also be the customer success managers that are responsible for these revenue numbers in some organizations.

Regardless, customer-led-growth marketers can help in many ways to set these sales efforts for success. You can structure your activities along the lines of 1 to many, 1 to few, and 1 to 1 programs.



Internal advocacy expansion play

- Webinar/video/case study sharing success metrics for internal distribution within the customer account

Grow and evolve plays for upgrades and expansion

- Highlight opportunities for gaining more value based on white space analysis

Renewal campaigns

- Share usage and value reinforcement data
- Customer success benchmarks
- Customer success stories

Whitespace analysis: spot opportunities for growth

When it comes to upgrades and expansion, you can segment your customers based on which additional products and upgrades you can offer them.

You can then create targeted 1-to-Few programs that are focused on the opportunity for the customer to gain additional value.

| | Product X | Product Y | Product Z |
|------------|------------|------------|------------|
| Customer A | None | Team | Team |
| Customer B | Free | None | Pro |
| Customer C | Enterprise | Enterprise | Enterprise |
| Customer D | Team | Enterprise | Team |
| Customer E | Pro | None | Enterprise |

Lifecycle programs wrap up

- Define the critical milestones that drive customer adoption, stickiness, and impact.
- Identify where customers may be stuck or need extra help.
- Design programs that leverage data, guidance, community and advocacy to help customers overcome these challenges at each stage.
- Tailor your programs to the customer personas that can best accelerate time-to-value.



Measuring Customer-Led-Growth

Three categories of measurement

Focus on the metrics that matter to the business to define your goals and measure the value you deliver. Use engagement and activity metrics to understand what can be improved in your content, the channels of engagement, and the mix of activities.

Business metrics

- NRR / NDR / GRR
- Retention
- Cross/up-sell
- Customer acquisition influence
- Adoption (MAU)
- Stickiness (DAU/MAU)
- Lifecycle NPS

Engagement metrics

- Account coverage
- Email metrics
- Community engagement
- In-app messaging engagement

Advocacy activity metrics

- Positive reviews
- Case studies
- Press announcements
- Media interviews
- Speaking engagements

Revenue metrics

In addition to tracking overall progress, you can use these metrics to gauge the effectiveness of specific programs. For example, you can look at the average NRR per customer that participated in a program vs. those that didn't participate to measure the contribution of a specific program to Net Revenue Retention.

You can measure renewals, upgrades and expansions separately, or you can roll them up into the NRR metric. NRR, which stands for Net Revenue Retention, is commonly used to evaluate the company's growth performance, especially for subscription-based business.

- Retention
- Cross/up-sell

$$\text{NRR} = \frac{\text{MRR at the beginning of the period} + \text{Expansion MRR} + \text{Upgrade MRR} - \text{Cancelled MRR} - \text{Downgrade MRR}}{\text{MRR at the beginning of the period}} * 100$$

- Customer acquisition influence

Look for the warning signs

Ideally, we want to see these indicators go up from the time of deployment forward. If you see a dip in adoption or stickiness, that could be a red flag that indicates a churn risk and possibly lower likelihood for an expansion.

Adoption and stickiness are leading indicators for retention and expansion. The more frequently your solution is used, the more value it delivers and the more difficult it is to replace.

Define high-risk cohorts based on:

- Adoption (MAU)
- Stickiness (DAU/MAU)

Watch for customers trending down on:

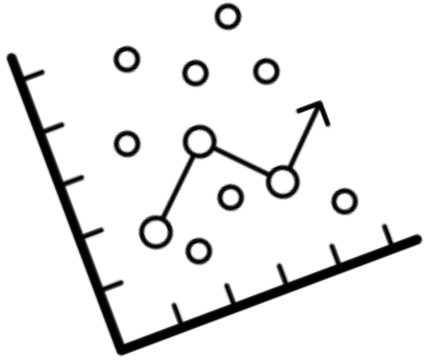
- MoM adoption change
- MoM stickiness change

Track account coverage

Tracking engagement score by persona provides a good indication where you may be under-engaging with key players that could come back to bite you when the time comes for a renewal or expansion discussion.

Account coverage is an aggregation of engagement metrics by account instead of by activity.

| Account | Users | Champions | Economic Buyers | Technical Buyers |
|-----------------|-------|-----------|-----------------|------------------|
| Acme | 42 | 47 | 99 | 68 |
| Brilliant Minds | 59 | 90 | 29 | 81 |
| Copy Cats | 30 | 95 | 25 | 82 |
| Dog Walkers | 55 | 33 | 43 | 19 |
| Earth Movers | 11 | 80 | 33 | 74 |
| Funny Ones | 71 | 66 | 72 | 56 |
| Game Time | 60 | 88 | 83 | 59 |

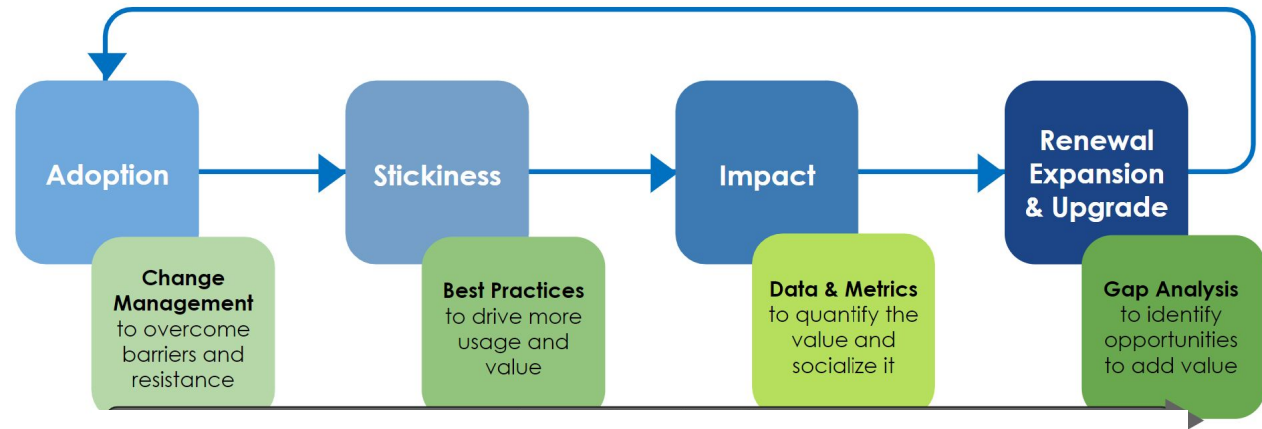


Optional

Building a statistical model for Customer-Led-Growth

This will get a bit technical, but I'm here to help!

Don't get discouraged if you don't have the data to support this level of analysis. Use this as a guide to the kind of data you need, but in the meantime, work with what you have and trust your intuition!!



[Link to Excel spreadsheet](#)

[Link to video walk-through](#)

We said that adoption, stickiness, and the ability to measure impact are stepping stones to retention, upgrades, and expansion. But how do we know and show how much they really drive revenue growth?

To do that, we want to turn our framework into a statistical model.

The data

We want to run a regression on the variables we are trying to drive - adoption, stickiness, and impact, and see how they statistically correlate with revenue growth.

| Account | Adoption | Stickiness | Impact | Last Year's ACV (\$k) | Current ACV (\$k) | Growth |
|-----------------|--------------------|--------------------|----------------|-----------------------|-------------------|-----------|
| | 12-month MAU/LIC % | 12-month DAU/MAU % | 12-month Score | | | YoY ACV % |
| Acme | 73 | 71 | 0 | 100 | 106 | 6 |
| Brilliant Minds | 59 | 90 | 0 | 100 | 101 | 1 |
| Copy Cats | 30 | 66 | 0 | 100 | 0 | -100 |
| Dog Walkers | 77 | 33 | 0 | 100 | 0 | -100 |
| Earth Movers | 91 | 80 | 100 | 100 | 130 | 30 |
| Funny Ones | 83 | 74 | 0 | 100 | 121 | 21 |
| Game Time | 92 | 88 | 100 | 100 | 170 | 70 |
| H2O | 73 | 71 | 0 | 100 | 108 | 8 |
| Igloo Buster | 59 | 90 | 0 | 100 | 103 | 3 |
| Joke Is On | 30 | 66 | 0 | 100 | 0 | -100 |
| Killer Instinct | 77 | 33 | 0 | 100 | 0 | -100 |
| LOL | 91 | 80 | 0 | 100 | 125 | 25 |
| Mind Games | 65 | 74 | 100 | 100 | 122 | 22 |
| No End | 92 | 88 | 100 | 100 | 180 | 80 |
| Oh My! | 73 | 71 | 0 | 100 | 110 | 10 |
| Pitch Count | 59 | 90 | 0 | 100 | 101 | 1 |
| Que It | 30 | 66 | 0 | 100 | 0 | -100 |
| Red Eye | 77 | 33 | 0 | 100 | 0 | -100 |
| Salt End | 91 | 80 | 0 | 100 | 144 | 44 |
| Time Bound | 83 | 74 | 0 | 100 | 117 | 17 |
| U Too | 59 | 88 | 100 | 100 | 150 | 50 |

Proxy for NRR

Reflects retention, expansion, and upgrades

We use YoY change in ACV for each customer as a proxy for NRR. The reason is that if we used NRR, the results would be skewed by the timing of contract renewal (e.g. last month vs. 11 months ago).

Regression output

If we run a regression on these numbers, we'll see something like this.

The Significance F and P-values tell us if the model is statistically valid.

| SUMMARY OUTPUT | | | | | | | | | |
|------------------------------|---------------------|-----------------------|---------------|----------------|-----------------------|------------------|--------------------|--------------------|--|
| <i>Regression Statistics</i> | | | | | | | | | |
| Multiple R | 0.974906376 | | | | | | | | |
| R Square | 0.950442442 | | | | | | | | |
| Adjusted R Square | 0.94169699 | | | | | | | | |
| Standard Error | 14.93178506 | | | | | | | | |
| Observations | 21 | | | | | | | | |
| <i>ANOVA</i> | | | | | | | | | |
| | <i>df</i> | <i>SS</i> | <i>MS</i> | <i>F</i> | <i>Significance F</i> | | | | |
| Regression | 3 | 72692.28 | 24230.76 | 108.6784881 | 2.71762E-11 | | | | |
| Residual | 17 | 3790.289 | 222.9582 | | | | | | |
| Total | 20 | 76482.57 | | | | | | | |
| | <i>Coefficients</i> | <i>Standard Error</i> | <i>t Stat</i> | <i>P-value</i> | <i>Lower 95%</i> | <i>Upper 95%</i> | <i>Lower 95.0%</i> | <i>Upper 95.0%</i> | |
| Intercept | -299.3465242 | 18.68403 | -16.0215 | 0.000000000 | -338.766376 | -259.927 | -338.766 | -259.927 | |
| Adoption | 1.62230975 | 0.173435 | 9.354001 | 0.000000041 | 1.256394185 | 1.988225 | 1.256394 | 1.988225 | |
| Stickiness | 2.387669581 | 0.198371 | 12.03641 | 0.000000001 | 1.969144361 | 2.806195 | 1.969144 | 2.806195 | |
| Impact | 0.204770292 | 0.086188 | 2.375866 | 0.029531408 | 0.022930228 | 0.38661 | 0.02293 | 0.38661 | |

To what degree is the outcome impacted by the variables tested?
(Closer to 1 is better)

Overall statistical significance
(Lower than 0.05 is good)

Individual variable statistical significance
(Lower than 0.05 is good)

Variable Coefficients

What does the model tell us?

The Adoption coefficient tells us that for every 10% change in adoption we can expect to get around 16% of change in YoY growth.

The Stickiness coefficient tells us that for each 10% change in stickiness we can expect about 24% of growth.

The Impact coefficient says that helping customers quantify the value of our solution can increase YoY ACV by an average of 20% per customer. This could mean, for example, that one of 5 of these customers that would otherwise churn would now be retained.

| | <i>Coefficients</i> |
|-------------------|---------------------|
| Intercept | -299.3465242 |
| Adoption | 1.62230975 |
| Stickiness | 2.387669581 |
| Impact | 0.204770292 |

There is much more we can test!

You can test the correlation of any data point to revenue growth, for example:

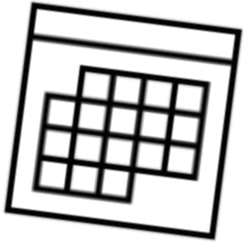
- How long it took to deploy the product
- Adoption after 2/3/6/x months
- Adoption of a specific product, feature, or integration
- Participation in advocacy programs
- NPS or other survey responses

Revenue model wrap up

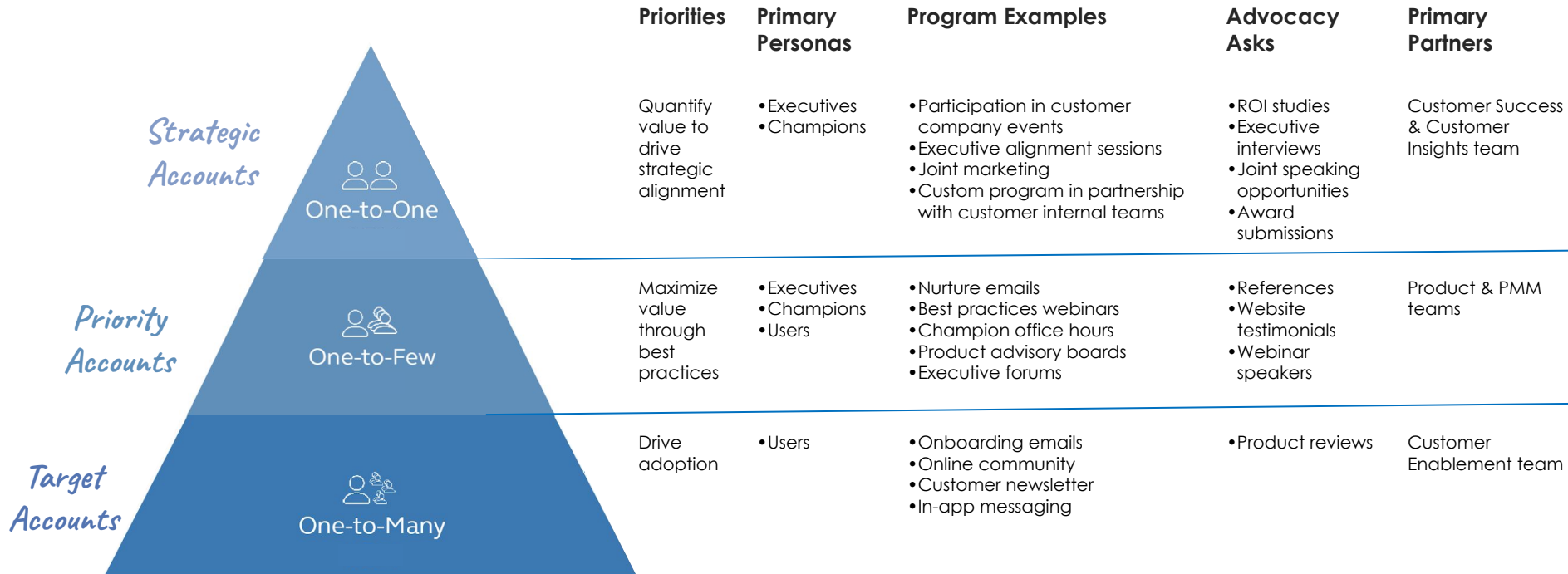
- Explore different variables in your analysis to understand what levers you can pull to drive growth.
- Let the data do the talking, don't try to force your narrative.
- If you don't have all the data you need, trust your intuition. Get your programs started based on your best guess, and work on getting the data to support it.



*Planning tools, templates,
and reports, oh my!*



An Account-Based Marketing framework can help you balance scale and personalization



A data-driven approach to maximize the revenue impact of your programs (using your statistical model)

Using your regression results to plan and track programs' impact on revenue growth

[Link to spreadsheet](#)

| Customer-Led-Growth Program Planning | | | | | | | | | | | | |
|--------------------------------------|--|--|-----------------------------------|-----------------|--------|------------------------|--------------------------|---|------------------------------|----------------------------|---------------------|-----|
| PERIOD | Q4 2022 | | PROGRAM OWNER [name] | | | | | | | | | |
| PROGRAM | Tip: Add link to audience report in CRM/Marketing Automation | | TARGET AUDIENCE / CUSTOMER COHORT | EXPECTED IMPACT | METRIC | Base Metric for Cohort | Target Metric for Cohort | ACV Coefficient <small>from regression</small> | Base ACV for Cohort (\$k) | Year One ACV Lift (\$k) | Total Cost (\$k) | ROI |
| Renewal / Expansion / Upgrade | | | | | | | | | | | | |
| New renewal playbook | Accounts up for renewal this year | Increase renewal rate | Renewal rate | 90% | 92% | 1.0 | 40,000 | 800 | 50 | 1500% | | |
| Upgrade playbook | Accounts on Team Edition | Increase Enterprise Edition upgrades | Upgrade rate | 10% | 12% | 0.3 | 10,000 | 60 | 35 | 71% | | |
| Customer conference | All customers | Increase expansion | Expansion rate | 15% | 18% | 1.0 | 50,000 | 1,500 | 200 | 650% | | |
| Impact / Metrics & Data | | | | | | | | | | | | |
| Q4 benchmark report | Product champions + Decision makers across all accounts | Increase % of customers quantifying impact | % of customers quantifying impact | 30% | 35% | 0.2 | 50,000 | 512 | 40 | 1180% | | |
| Stickiness / Best Practices | | | | | | | | | | | | |
| Best practices webinar series | All existing customers | Increase Stickiness | DAU/MAU | 60% | 62% | 2.4 | 50,000 | 2,388 | 45 | 5206% | | |
| Integration campaign | All customers without integration | Increase Stickiness | DAU/MAU | 40% | 45% | 2.4 | 10,000 | 1,194 | 15 | 7859% | | |
| Adoption / Change Management | | | | | | | | | | | | |
| Change management guide | Customers onboarded in last 90 days (rolling) | Increase adoption | MAU/Licensed Users | 45% | 50% | 1.6 | 1,500 | 122 | 30 | 306% | | |
| Other | | | | | | | | | | | | |
| | | | | | | | | | 6,575 | 415 | 1484% | |

A data-driven approach to maximize the revenue impact of your programs (without a statistical model)

If you don't have the data to support a statistical model, you can use an estimated NRR lift to plan and track programs' impact on revenue growth.

[Link to spreadsheet](#)



| Customer-Led Growth Program Planning | | | | | | | | | | | | | |
|--------------------------------------|---|--------------------------------------|--------------------|--------------------|-------------------------|--------------------------|-------------------------|----------------------|--|------------------|--------------|------------|-------------|
| PERIOD | Q4 2022 | PROGRAM OWNER | [name] | | | | | | | | | | |
| PROGRAM | TARGET AUDIENCE / CUSTOMER COHORT | EXPECTED IMPACT | Baseline ARR (\$k) | Reduce churn (\$k) | Reduce downgrades (\$k) | Increase expansion (\$k) | Increase upgrades (\$k) | New sales lift (\$k) | Year One ARR Lift (\$k) | Total Cost (\$k) | ROI | | |
| Renewal / Expansion / Upgrade | | | | | | | | | | | | | |
| New renewal playbook | Accounts up for renewal this year | Increase renewal rate | 50,000 | 500 | | | | | 500 | 50 | 900% | | |
| Upgrade playbook | Accounts on Team Edition | Increase Enterprise Edition upgrades | 20,000 | | | | 200 | | 200 | 35 | 471% | | |
| Impact / Metrics & Data | | | | | | | | | | | | | |
| Q4 benchmark report | Product champions + Decision makers across all accounts | Increase expansion and upgrades | 50,000 | | | 50 | 25 | | 75 | 40 | 88% | | |
| | | | | | | | | | 0 | | | | |
| Stickiness / Best Practices | | | | | | | | | | | | | |
| Best practices webinar series | All existing customers | Increase renewal and expansion | 50,000 | 50 | | 150 | 50 | | 250 | 45 | 456% | | |
| | | | | | | | | | 0 | | | | |
| Adoption / Change Management | | | | | | | | | | | | | |
| Change management guide | Newly boarded customers | Reduce churn + accelerate expansion | 7,500 | 50 | | 50 | | | 100 | 50 | 100% | | |
| | | | | | | | | | 0 | | | | |
| Other | | | | | | | | | | | | | |
| Customer conference | All customers | Expansion, upgrades | 50,000 | | | 300 | 50 | | 350 | 200 | 75% | | |
| | | | | | | | | | 0 | | | | |
| | | | | | | | | | Total Year One ARR Lift from Existing Customers | | 1,475 | 420 | 251% |
| | | | | | | | | | Current ARR | 50,000 | | | |
| | | | | | | | | | NRR Impact | 2.95% | | | |

Plug this NRR impact estimate into the Revenue Impact Calculator sheet to see ARR lift beyond Year One

Year One Plan (sample)

Q1

ACTIVATE

- Team
- Plan
- Budget
- KPIs
- Management buy-in
- Stakeholder alignment
- Initial content assets

Q2

LAUNCH

- Pilot programs launched
 - Identify quick wins
 - Single stage in the customer lifecycle
 - Single channel
- Additional content assets
- Success metrics tracked

Q3

EXPAND

- Impact additional stages in the customer lifecycle
- Add more channels
- Additional content assets

Q4

OPTIMIZE

- Evaluate and adjust existing programs
- Automate key activities
- Expand based on initial success
- Continue to experiment

Getting started from the ground up: 30-60-90 Day Plan

LAND SURVEY

(0-30 days)

- Internal stakeholder interviews
- Customer interviews
- Customer data analysis
- Systems and channels review

FOUNDATIONS

(30-60 days)

- Strategy document
- Success metrics
- Persona analysis
- Messaging alignment
- 6-month plan
- Stakeholder socialization

FRAME

(60-90 days)

- Initial program plans
- Content asset buildup
- Channel & tools buildup



First deliverables in market

TRIM

(90+ days)

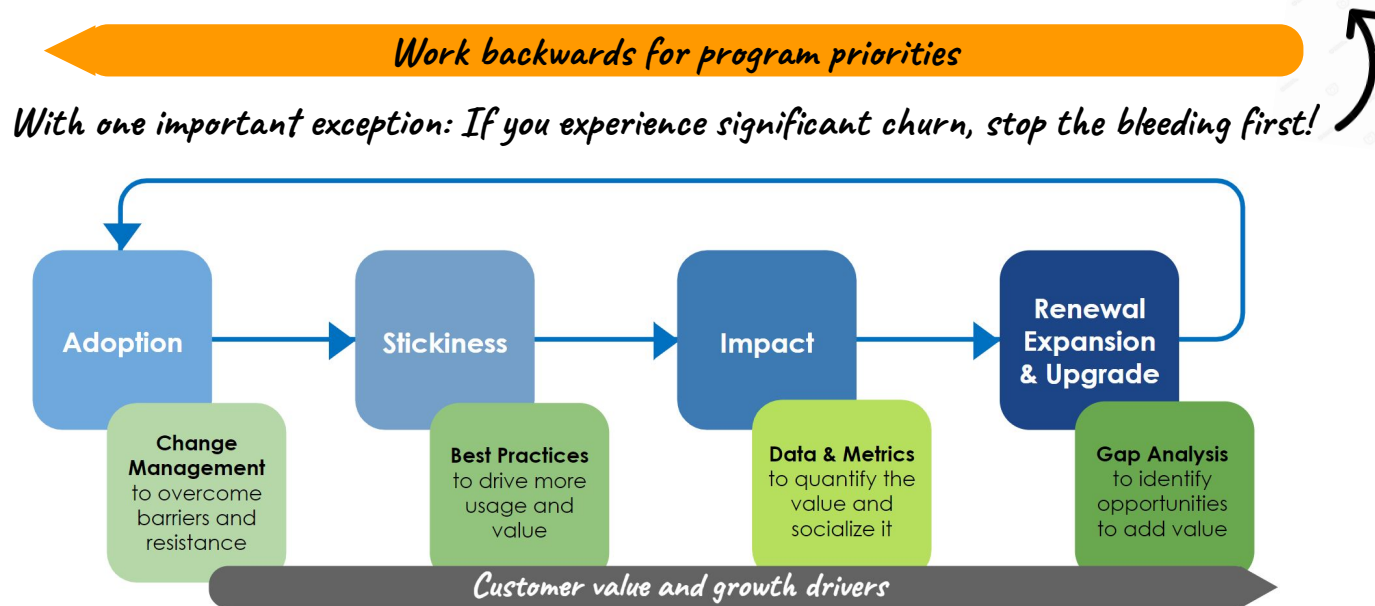
- Measure
- Iterate
- Expand

Start with the greatest revenue impact

Start with the programs that can deliver the greatest revenue impact, which would typically be focused on upgrade and expansion campaigns.

This will allow you to show some early revenue-generating results and help you get more buy-in.

If you experience significant churn, fix that first. Trying to fix churn with last minutes efforts at renewal time is a losing battle, so take a close look at the critical milestones that drive adoption, stickiness, and impact to set customers for success at every stage of their lifecycle.



Final words (almost)



Use this guide as a framework to create your own strategy and tactics, not a recipe.



Identify the critical milestones that drive customer adoption, stickiness, and impact.



Incorporate data, guidance, community, and advocacy to design programs that help customers at each stage.



Tailor your programs to the customer personas that can best accelerate time-to-value.



Use data to guide your priorities, but don't let a lack of data stand in the way.



Balance long-term impact with quick wins to get buy-in and secure additional resources.

How can I help? Getting Started Packages

Gap & opportunity analysis

- Analyze retention and expansion patterns
- Identify friction points
- Carve out high potential customer cohorts
- Quantify opportunities for improvement

Strategy & planning workshop

- Define your CLG flywheel
- Create a business case
- Prioritize programs based on growth ROI
- 1:M / 1:F / 1:1 program mapping
- Define KPIs, reports, and dashboards

Messaging & content review

- Craft renewal & expansion messages for relevant personas
- Review existing comms to ensure alignment with messaging
- Map existing content to support messages

Program in a box

- Manage one program from A-Z
- Identify a quick win opportunity
- Work with your team or completely outsourced

To learn more:

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[MarketCapture website](#)

Free [online training course](#)