

# No Fluff: Designing Data-Driven Customer Success Processes

This worksheet is a framework for planning and implementing data-driven Customer Success strategies. You will be guided through a set of prompts to help you build your approach during the event.

<p><b>Data-Driven Motion</b> What is one high-impact motion you would like make data-driven? (i.e. prioritizing feature requests, forecasting NDR, driving adoption, etc.)</p>	
<p><b>Data</b> What data do you require to power this motion? (i.e. product data, health score data, etc.)</p>	
<p><b>Tooling</b> Where will this data come from? (i.e. CRM, CSP, BI tool, etc.)</p>	
<p><b>Integrations</b> Where does the data need to flow for it to be usable/scalable? (i.e. CRM data sends to CS platform)</p>	
<p><b>Project Plan</b> Who needs to be involved? Will it require new tools? Will it require engineering time? How long will it take?</p>	
<p><b>Success</b> How can you measure the success of this project? What is the company object this supports?</p>	
<p><b>Next Steps</b> What are the first 1-3 next steps you need to take from here to get started?</p>	

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## Sample answers:

<p><b>Data-Driven Motion</b> What is one high-impact motion you would like make data-driven? (i.e. prioritizing feature requests, forecasting NDR, driving adoption, etc.)</p>	<ul style="list-style-type: none"> <li>- Drive adoption and prevent churn risk via proactive outreach on low usage</li> </ul>
<p><b>Data</b> What data do you require to power this motion? (i.e. product data, health score data, etc.)</p>	<ul style="list-style-type: none"> <li>- Product usage data (e.g. event tracking)</li> </ul>
<p><b>Tooling</b> Where will this data come from? (i.e. CRM, CSP, BI tool, etc.)</p>	<ul style="list-style-type: none"> <li>- Event Tracking</li> <li>- CSP</li> </ul>
<p><b>Integrations</b> Where does the data need to flow for it to be usable/scalable? (i.e. CRM data sends to CS platform)</p>	<ul style="list-style-type: none"> <li>- Product Usage -&gt; Data Warehouse -&gt; CSP</li> <li>- CRM -&gt; CSP</li> </ul>
<p><b>Project Plan</b> Who needs to be involved? Will it require new tools? Will it require engineering time? How long will it take?</p>	<ul style="list-style-type: none"> <li>- Collaborate with Product team</li> <li>- Identify key product usage metric to use as main signal</li> </ul>
<p><b>Success</b> How can you measure the success of this project? What is the company object this supports?</p>	<ul style="list-style-type: none"> <li>- Measure success via increase in adoption (e.g. % increase in key metric)</li> <li>- Supports company's overall NDR metric</li> </ul>
<p><b>Next Steps</b> What are the first 1-3 next steps you need to take from here to get started?</p>	<ul style="list-style-type: none"> <li>- Set a meeting with CS ops and Product to align on strategy and technical next steps</li> </ul>