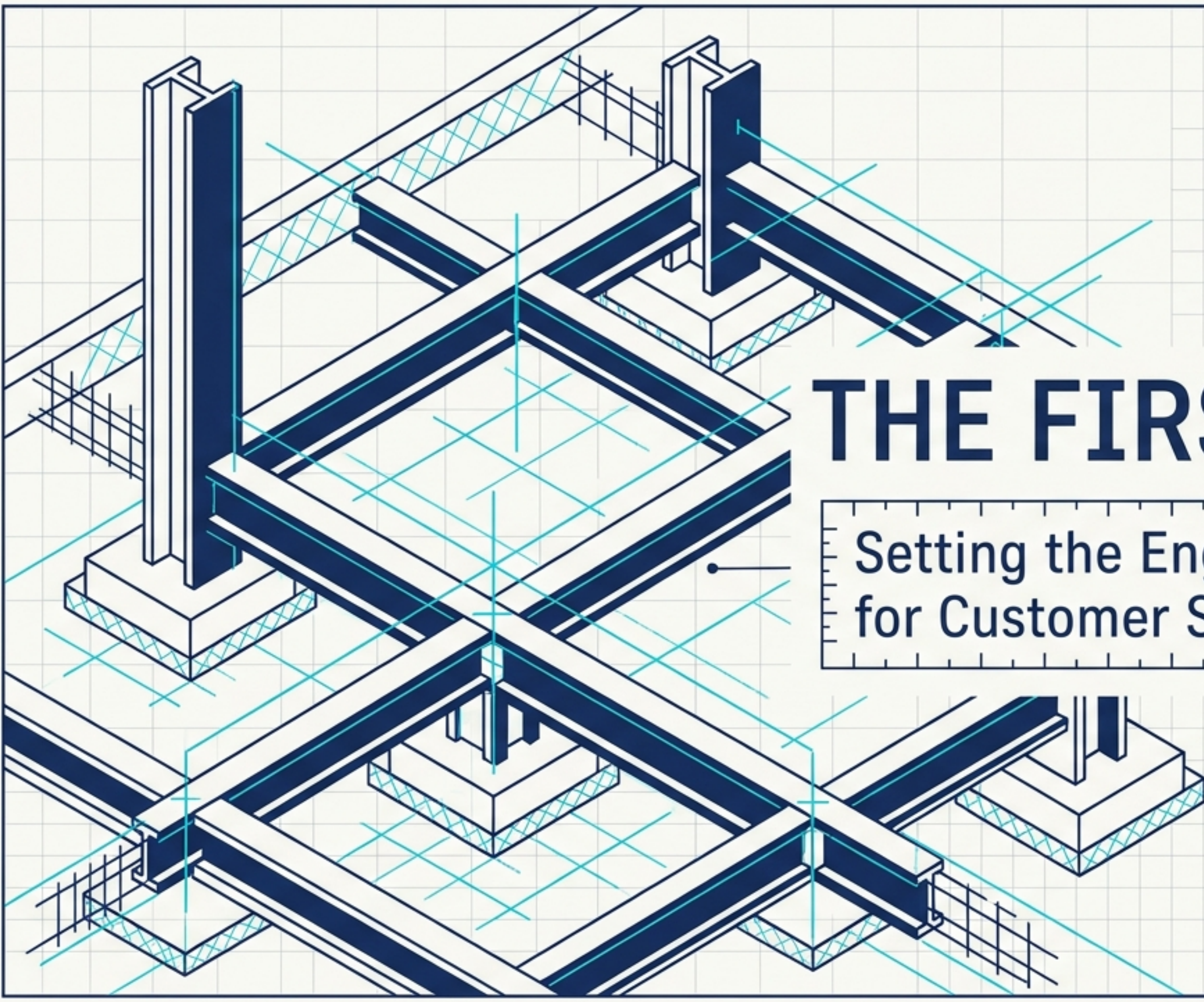




THE FIRST 90 DAYS

Setting the Engineered Foundation
for Customer Success.

Based on insights by
Mayuresh Shilotri.

Trusted Advisor Status

Phase 1: Groundwork (Days 1-30)

Needs
Discovery

Goal
Alignment

Success
Planning

Phase 2: Construction (Days 31-60)

Role-Specific
Onboarding

Stakeholder
Engagement

Phase 3: Inspection (Days 61-90)

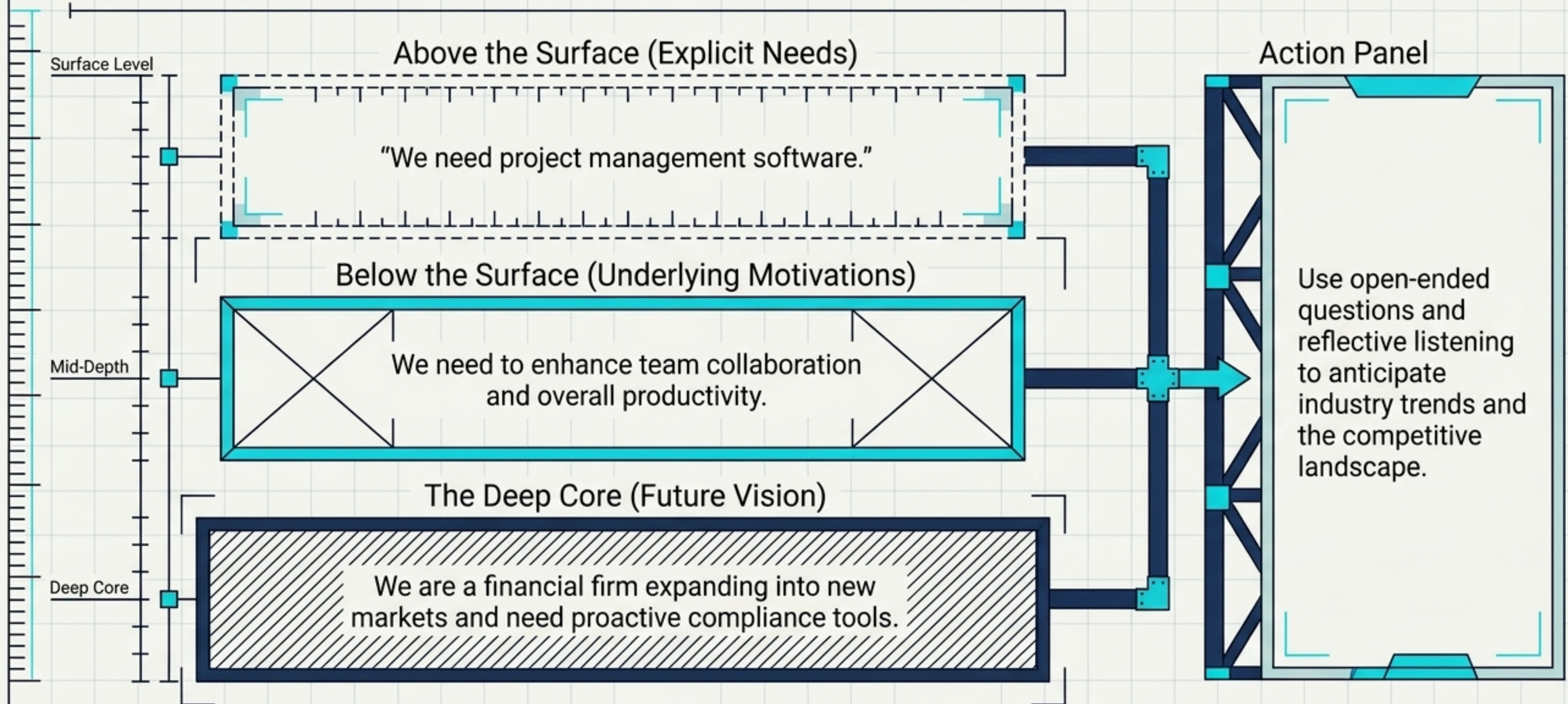
Proactive
Support

Iterative
KPIs

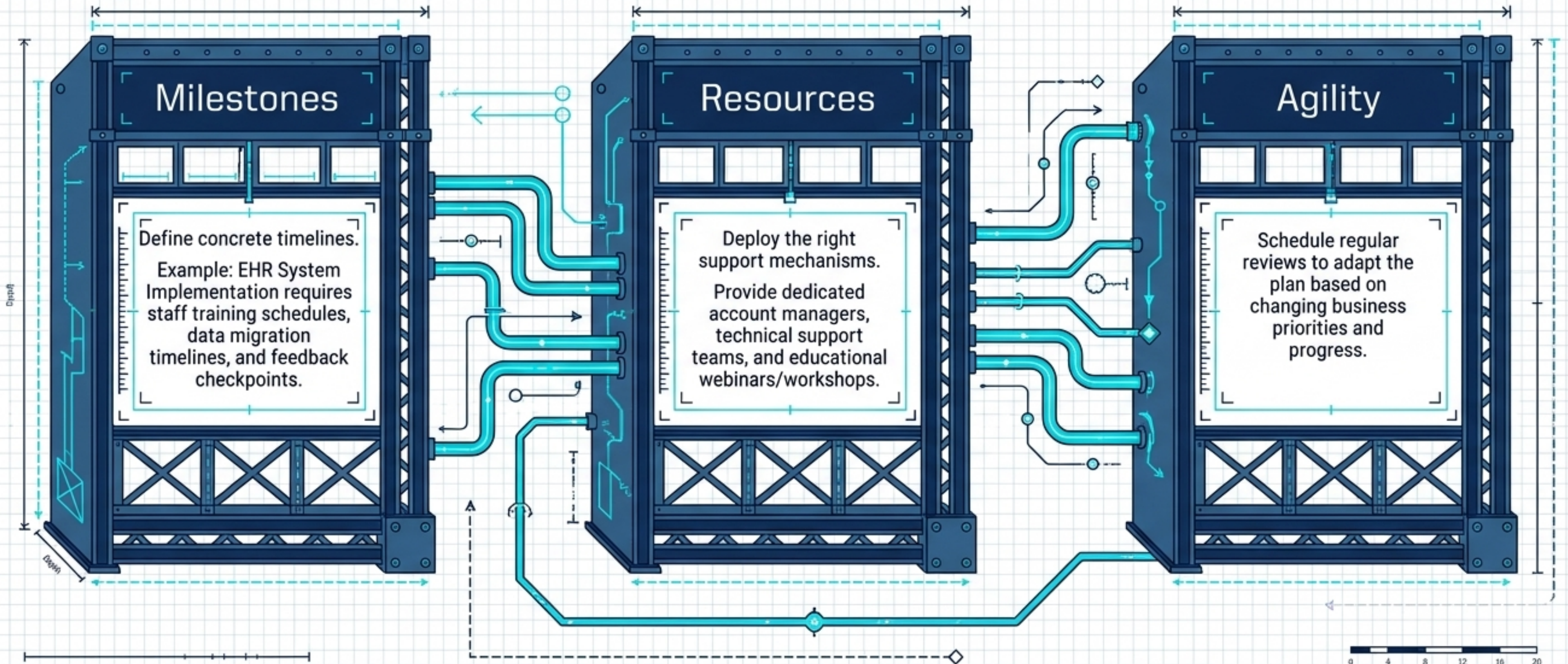
Feedback
Loops

A fruitful relationship begins with active listening and ends with continuous improvement.

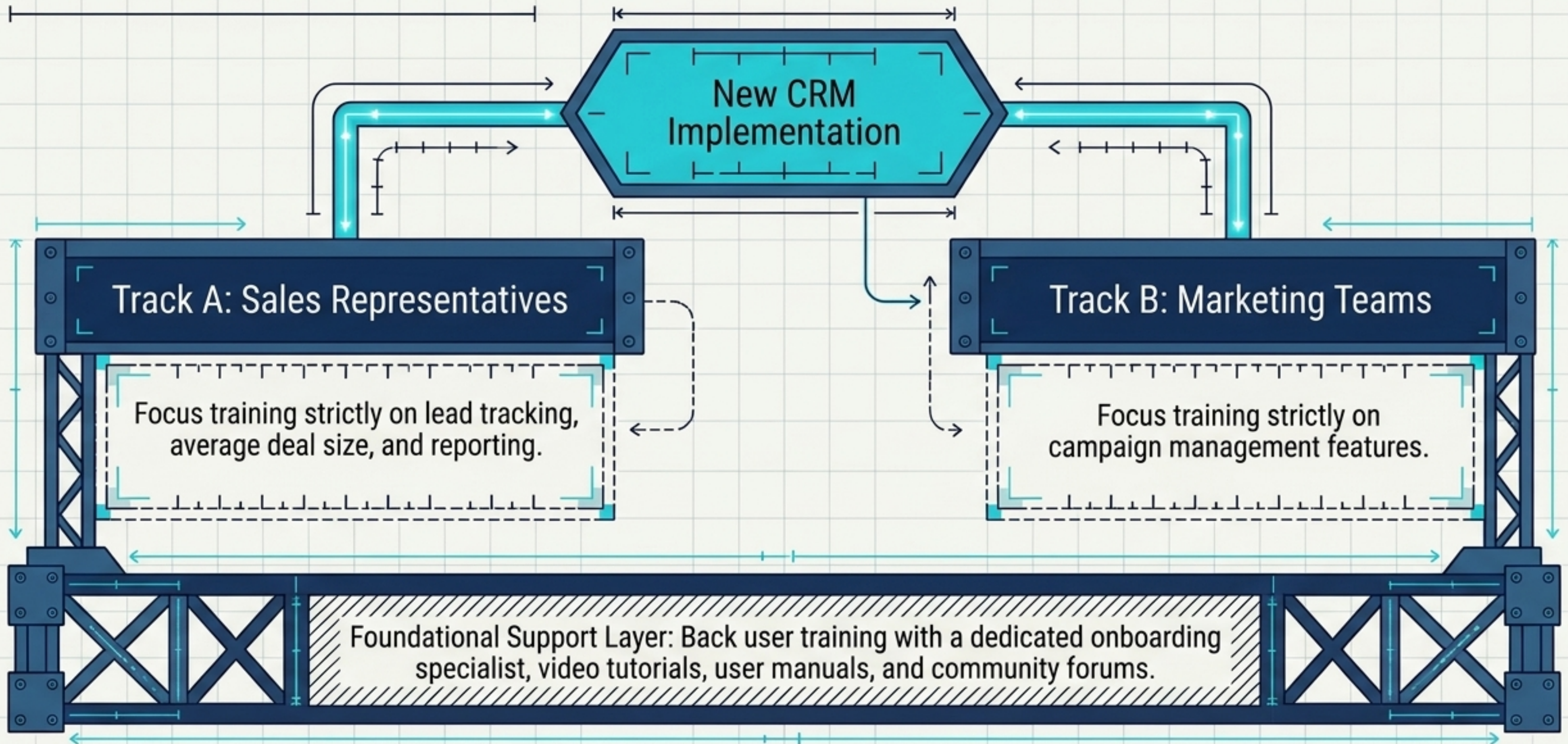
Charting the Subsurface: Uncovering the “Why”



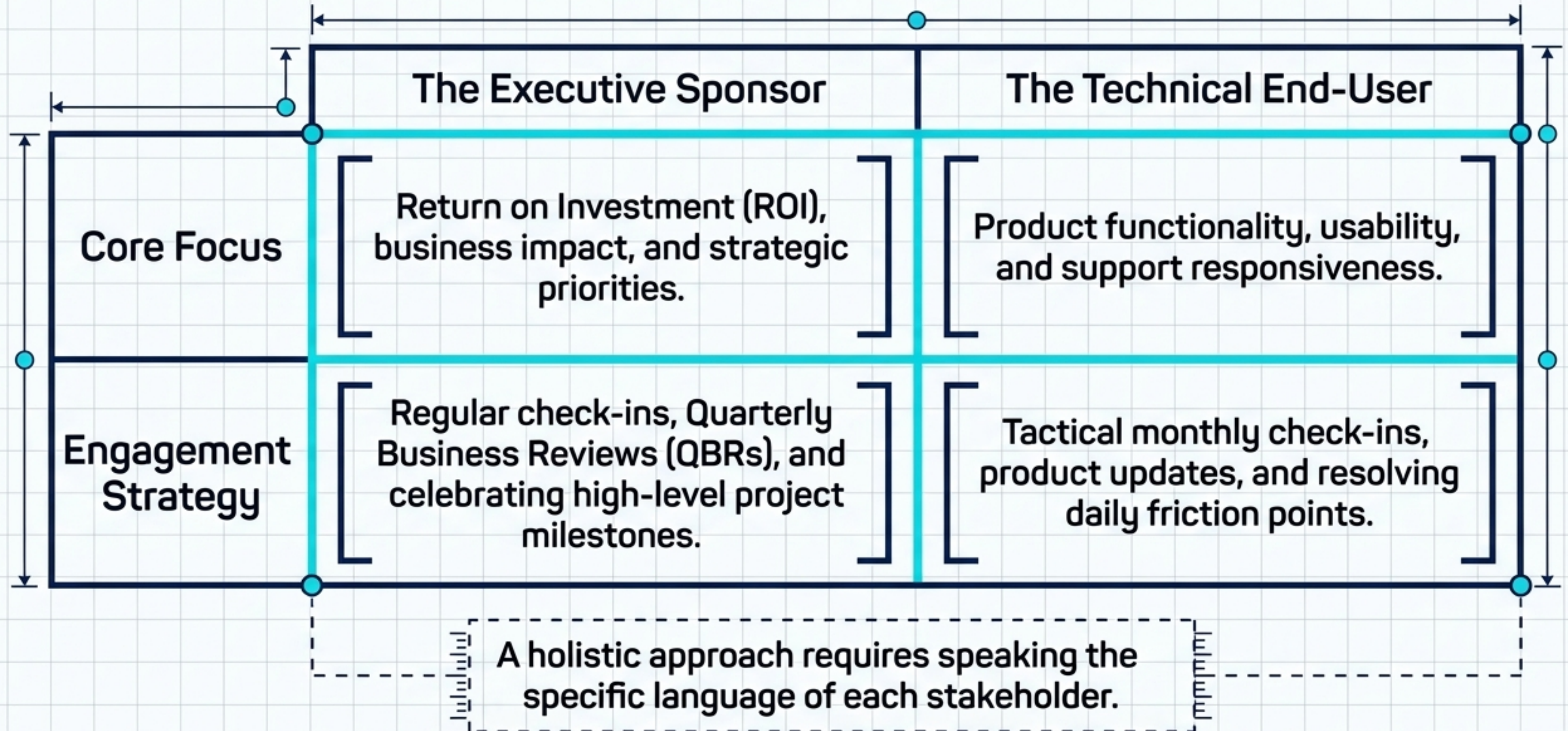
Engineering the Personalized Success Plan



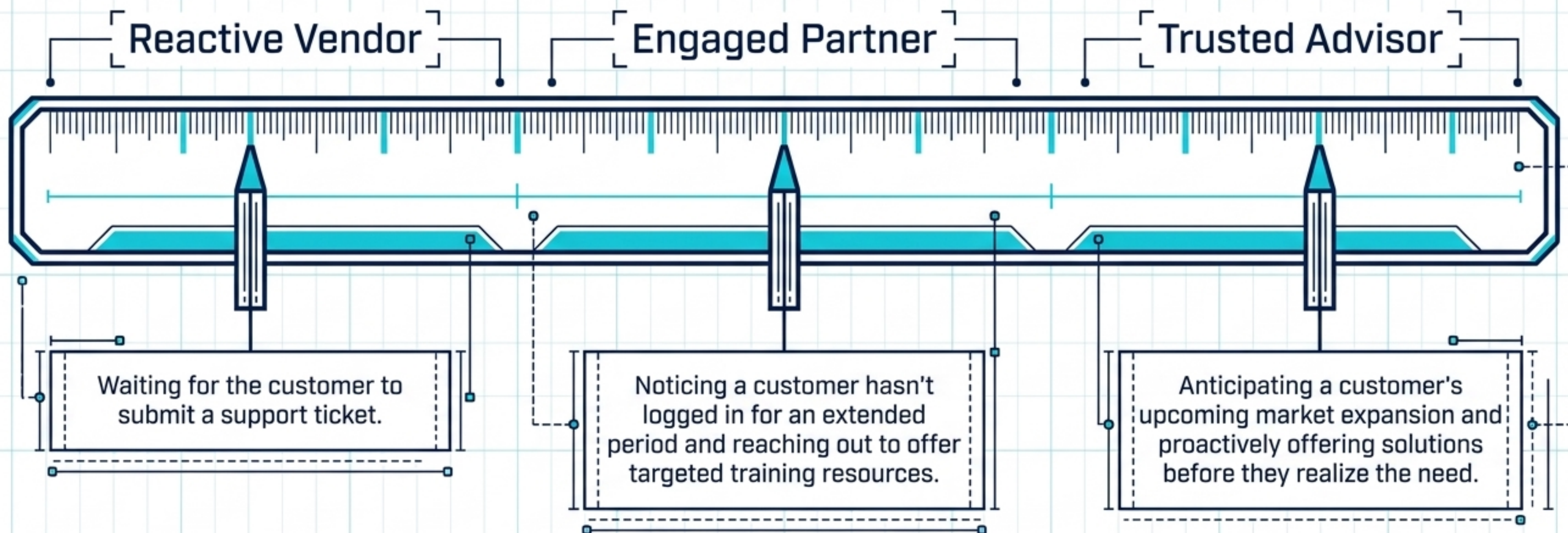
One Size Fits None: Role-Specific Onboarding



The Stakeholder Engagement Matrix



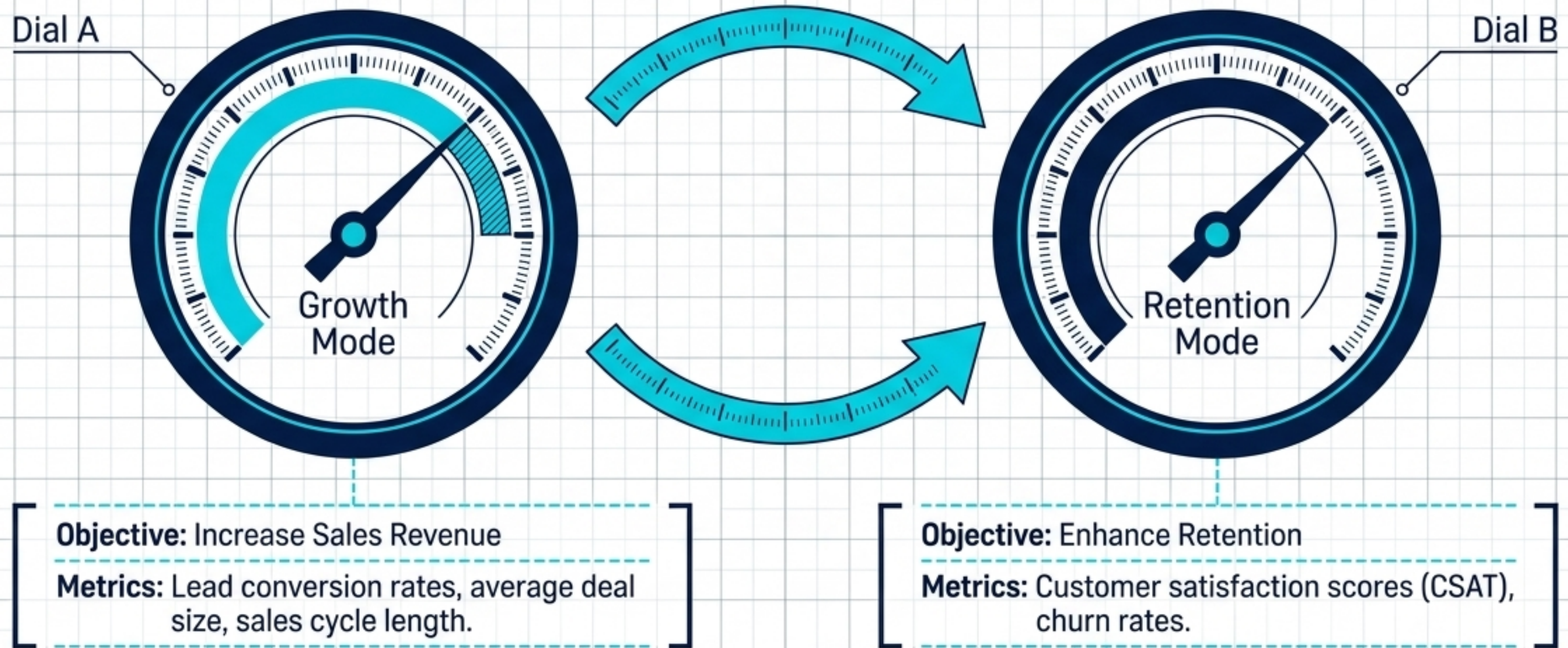
The Proactive Communication Spectrum



Systems note: Leverage automated CRM campaigns alongside monthly check-ins to deliver timely, tailored updates.

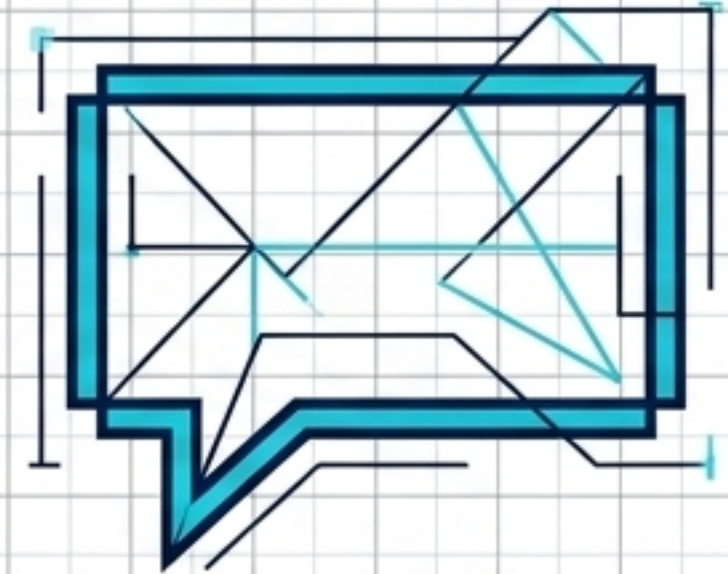
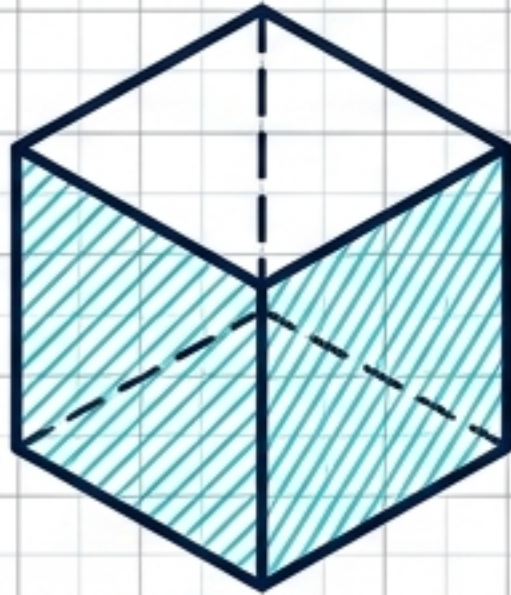
Iterative KPI Calibration

KPIs are not set in stone; they must maintain flexibility as market conditions shift.



Action: Collaboratively define metrics early, but revisit them regularly to ensure alignment with current strategy.

The Measurement Balance



Quantitative Data

Tools: NPS surveys, usage metrics, time-to-value tracking.

Purpose: Identifies the objective trends and likelihood to recommend.

**360°
Health**

Qualitative Insights

Tools: 1-on-1 interviews, focus groups, open-ended feedback.

Purpose: Reveals the human pain points and perceived product value.

[Conclusion: Combine both to develop a comprehensive view of customer success that informs future initiatives.]

The Continuous Improvement Engine

