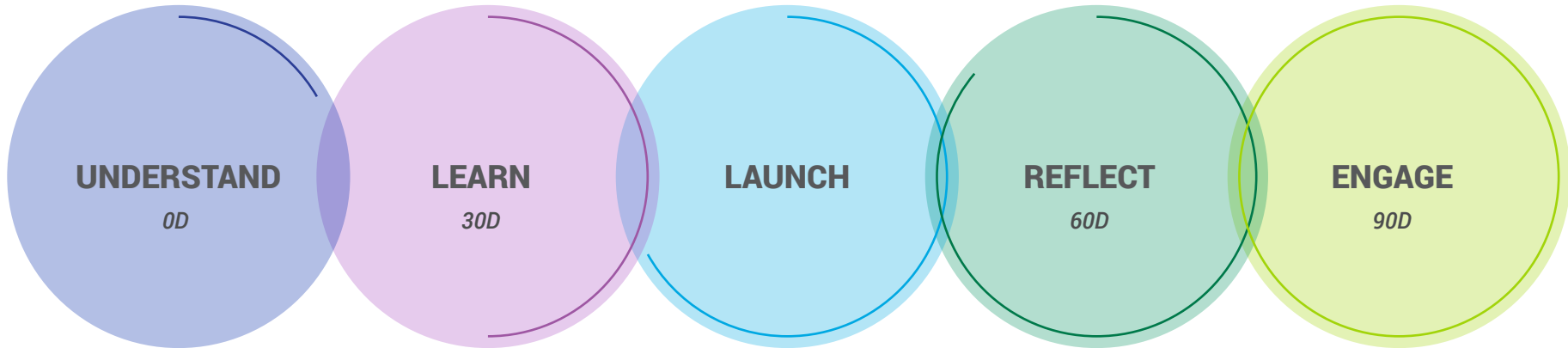


CUSTOMER SUCCESS PROCESS



UNDERSTAND *0D*

- Meet by phone with your Customer Success Manager (CSM) and a Professional Services consultant.
- Include your CRM Admin, if applicable, and any other person(s) responsible for the program.
- Discuss your short-term requirements, long-term vision, and ideal process.
- Kick off Fast Track to Success, if appropriate

LEARN *30D*

- Set aside time to learn Clicktools and gain proficiency as quickly as possible.
- Take advantage of online training, documentation, and other resources.
- Get extra help from the Support team and your CSM.

LAUNCH

- Go live with your Clicktools project using Fast Track to Success, if applicable.
- Start acting on the feedback you collect and centralize in CRM.
- Rely on your CSM to ensure everything works according to plan.

REFLECT *60D*

- Schedule a review with your CSM to record the pros and cons of your experience.
- Revisit your long-term vision and make any necessary updates.
- Arrange to document your project in a Clicktools Success Story.

ENGAGE *90D*

- Work with your CSM to ensure you're maximizing the value of SURVE.
- Identify interactions across the customer journey that could be improved by enabling feedback.
- Consider the addition of new surveys triggered by those important touch-points.