

UTILIZING THE SUCCESSPLAN CANVAS

**How to Create a
Success Plan for
Maximum Impact**



SuccessCOACHING

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INTRODUCTION

Making it Easier for Your Customers to See the Road to Success

What is a Success Plan?

A Success Plan is a blueprint of what you are going to do, and when and what your measures of success are. A good Success Plan can tie together your plays and your outcomes in a way that makes it easier for your customers to understand what the roadmap to success looks like.

Think of it as part dashboard and part report card. It is reading back to your customer how you're progressing through the plan that you've jointly created, what the next steps are, and how successful you're being.

Why Use a Success Plan?

Our SuccessPLAN Canvas enables you to have a conversation based on a single piece of paper, and that's really powerful. You don't have to page through slides. You don't have to build up to your read back of how you're doing. You--and your customer--can see it all on one piece of paper.

When you use it in your business reviews, you'll get more head nods. Your customer will be more engaged and see how it all fits together. They'll understand what the journey looks like, how they're doing and what the end point will look like. This enables you to have more useful conversations.

SuccessPLAN Canvas

Account Name:

Prepared By:

Company Highlights

Objectives

Key Challenges

Key Benefits

Milestones
Actions & Dates

Success
Criteria

Measures
of Success



BEST PRACTICES

Be Brief, but Thorough. A Success Plan is not a replacement for your encyclopedic knowledge of your customer and their goals. Keep it short so your customer and anyone involved in the business reviews isn't bogged down in unnecessary details.

Keep it Together. While you could expand and go deeper on a lot of the sections of the Success Plan, it's best to keep it brief so it fits on one sheet. It's much more powerful than paging through slides.

COMMON MISTAKES

Surprises. You should never include something that you haven't validated with the customer. All of the challenges, goals, and milestones should have already been agreed upon. If they don't agree with you, you've created a bone of contention.

Lack of Measurable Success. How do you know if you're successful if you don't have a measurable goal? Leaving out clear, measurable success metrics could create misalignment between you and your customer on what success looks like.

HOW TO POPULATE THE SUCCESS PLAN

The SuccessPLAN Canvas has seven sections intended to guide you and your customer through the roadmap to success. Populating these sections with the key information will help make conversations with your customers, and your boss, a lot easier.

1. Company Highlights

Write brief description of who the company is. What do they do? Are they in a specific vertical? What makes them interesting?

2. Objectives

Next is the objectives. What are we working towards? Don't include the steps along the way, but simply their end goal. What are their expectations? What is it that they're looking to achieve?

3. Key Challenges

Here, focus on the things that you know are going to be speed bumps on the road to success. These things should be based on conversations you've had with the customer.

4. Key Benefits

What are the key benefits based on the customer's desired outcome? What is the gain that it's going to create? What is the pain that it's going to relieve? These are the key benefits.

When you're writing this out, make sure that you can put a yardstick to them, a measurement.

5. Milestones and Actions

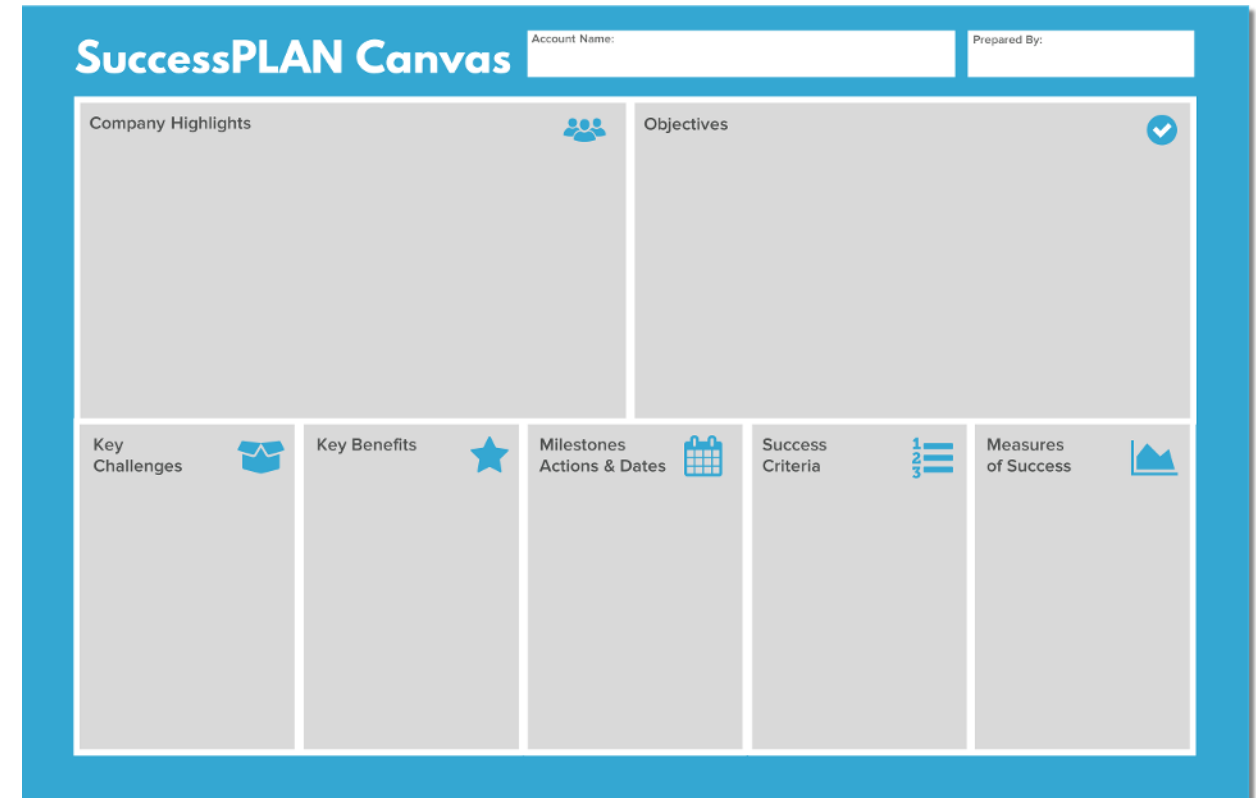
In this section, document key steps that you have to take and the due dates that are associated with them. This gets everyone on the same page as to what is going to happen next.

6. Success Criteria

Here, capture what success looks like at a high level. Be sure that it's defined as something that's measurable .

7. Measures of Success

If you want to achieve success, you have to put a number to it! Put your success metrics in this section.



The SuccessPLAN Canvas is a structured template for planning customer success. It features a blue header with the title "SuccessPLAN Canvas" and two input fields: "Account Name:" and "Prepared By:". The canvas is divided into six main sections, each with a specific icon and title: "Company Highlights" (people icon), "Objectives" (checkmark icon), "Key Challenges" (envelope icon), "Key Benefits" (star icon), "Milestones Actions & Dates" (calendar icon), "Success Criteria" (list icon), and "Measures of Success" (line graph icon). Each section is represented by a large, empty gray box for user input.

FOR MORE INFO

The SuccessCOACHING program, developed by SuccessHACKER, allows you to cultivate top-notch Customer Success skills. Included in the course are best practices for populating and utilizing the Success Plan Canvas to help drive useful conversations with your customers.

To get additional tools like the Success Plan Canvas, learn more tips and tricks to deliver better outcomes for your customers, or to sign up for a SuccessCOACHING course, **visit www.successcoaching.co**.



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