

The Salesforce

PLAYBOOK FOR CUSTOMER SUCCESS



**A PROVEN APPROACH THAT HELPS COMPANIES
ACCOMPLISH THEIR GREATEST AMBITIONS**



salesforce success cloud

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INTRODUCTION

NAVIGATING THE PATH TO SUCCESS COMES WITH CHALLENGES

**WHERE SHOULD I GO NEXT?
IS THIS THE RIGHT ROUTE TO TAKE?
WHAT IS MY COMPANY'S NORTH STAR?**

We're familiar with the questions companies ask when pursuing a goal. From the very beginning, Salesforce has been obsessed with making sure all of our customers are successful. That's why Salesforce established the Customer Success Group and pioneered the customer success management model for all industries. We've helped over 150,000 customers achieve their greatest ambitions and now, as part of our commitment to your success, we're going to share with you what we've learned since we launched in 1999.

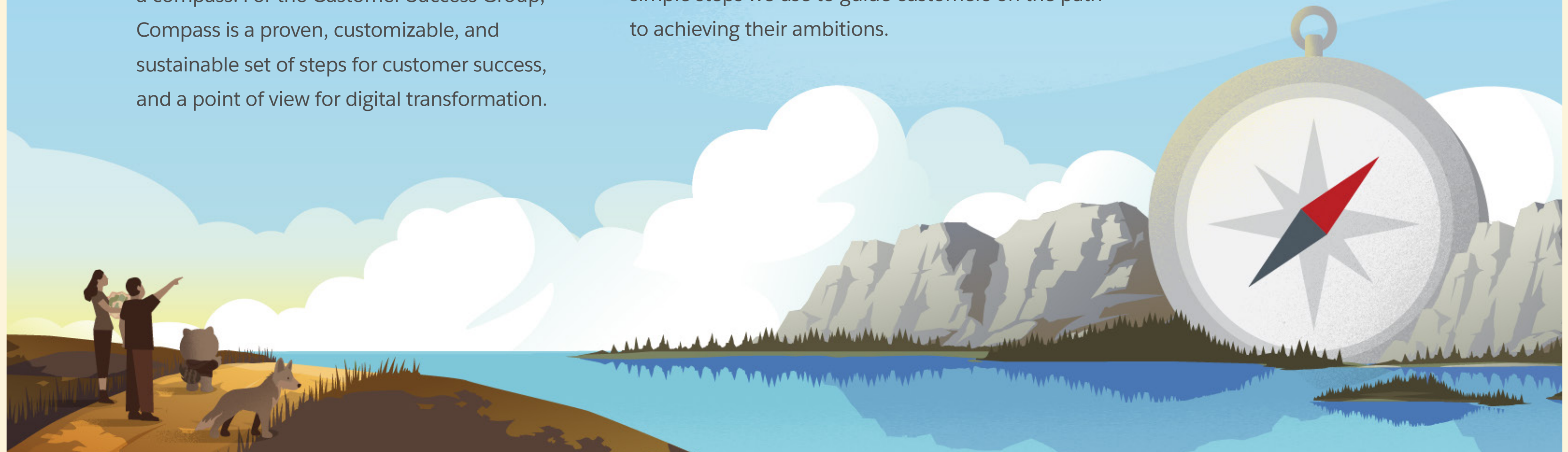


COMPASS OVERVIEW

INTRODUCING COMPASS: THE PLAYBOOK FOR CUSTOMER SUCCESS

OVER ALMOST TWO DECADES, we've developed tools and guideposts to help customers take their companies to the next level. And one thing every Trailblazer needs is a compass. For the Customer Success Group, Compass is a proven, customizable, and sustainable set of steps for customer success, and a point of view for digital transformation.

Compass is a strategic framework designed to help grow a company's capabilities, inspire its teams, and continually realize its ultimate vision. It may sound complex, but we've streamlined the process to three simple steps we use to guide customers on the path to achieving their ambitions.



THE THREE PLAYS FOR SUCCESS



PLAY ONE:

**GET TO KNOW THE
STAKEHOLDERS**



PLAY TWO:

**ALIGN ON A
DEFINITION OF
SUCCESS**



PLAY THREE:

**BUILD A SUCCESS
CULTURE**

1

PLAY ONE:

GET TO KNOW THE STAKEHOLDERS

Getting to know a customer is a crucial first step on the journey to a goal, but not everyone takes the time to do it. For Salesforce, it's important for us to dive deep into a company so we can help build a bridge from where it is to where it wants to go. Understanding where a company is starting, who the stakeholders are, and what their business and technology goals are allows us to write a customized roadmap for accomplishing their unique vision.

As a critical part of the roadmap, we also look at areas of tension that might arise in pursuit of a company's goals. Most goals have trade-offs and options that can alter the path toward success. We work closely with customers to look at all of the options, make the right decision for their company, and keep the momentum moving forward. After we've completed this knowledge-gathering phase, we work with our customers to align on a clear definition of success.



SALESFORCE TIP:
**KNOW YOUR
STAKEHOLDERS**

Do you know who your success stakeholders are? Pull together a team of your business and technology leaders to help you take actionable steps toward the vision for your company. Make sure that each member of this team is on board and ready to help. Then document, prioritize, and jointly commit to the next steps that will help you research and define your ultimate goal.



2

PLAY TWO:

ALIGN ON A DEFINITION OF SUCCESS

We're obsessed with our customers' success, and we want to help every company share that obsession. That said, we realize that every company has a different journey to success, so we work collaboratively with each company to map out the best journey for it. We do this by aligning on a clear definition of what success looks like for its stakeholders. Then, we make sure that business and IT teams are also aligned internally and working together to accomplish common goals.



SALESFORCE TIP:

DEFINE SUCCESS WITH YOUR LEADERSHIP

Plan a sit-down with your business and technology leaders. Ask your stakeholders to align on the specific definition of success for the company. Then, document the steps and milestones that will allow you to achieve that success. We also suggest planning a series of regularly scheduled meetings to keep everyone focused on completing the action steps needed to achieve your goals.

3

PLAY THREE:

BUILD A SUCCESS CULTURE

Success is a team sport, and we help every customer build a culture that supports achievement at all levels of a company. We collaborate with our customers' technology and business leaders, and share best practices for integrating teams, platforms, and systems. By incorporating these principles, companies can innovate new products to better serve their customers. Additionally, we work together with stakeholders to design programs to achieve their definition of success and increase value.

Another key to building a success culture is mastering specific capabilities. By growing capabilities we've observed at other successful companies, our customers get the skills they need to maintain a robust success culture. We'll go into more detail about building these capabilities in the next section.



SALESFORCE TIP:

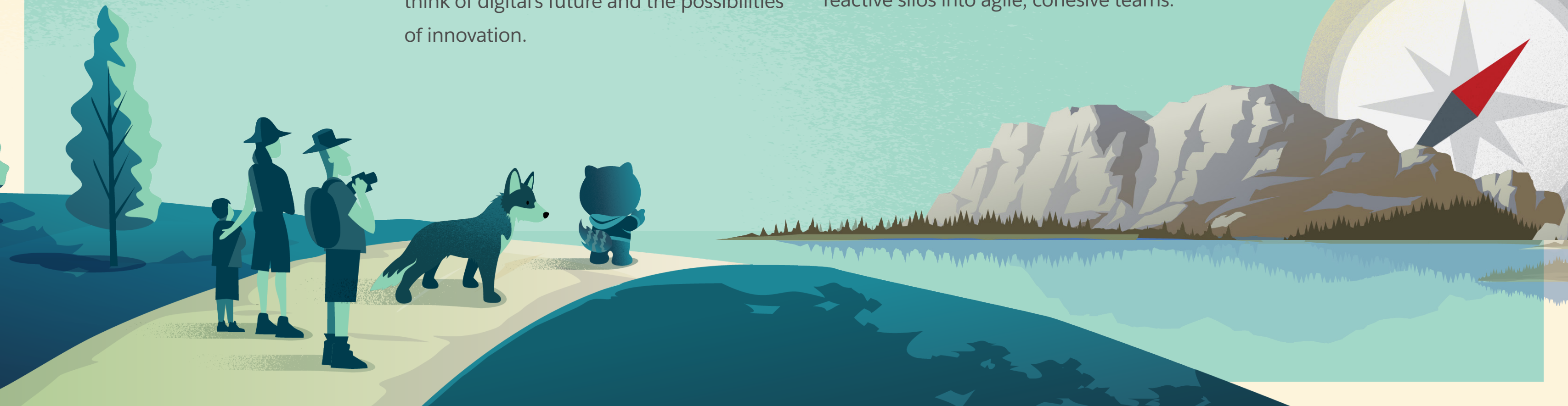
**SHARE YOUR PLAN
WITH EVERYONE**

Part of building a success culture is making sure everyone in your company is clear on what your priorities are. Once you've aligned on your key priorities, share them with your employees, vendors, and partners to set the groundwork for where your company is headed and how you're going to get there.

OUR POINT OF VIEW FOR DIGITAL TRANSFORMATION

ALONG WITH GETTING TO KNOW OUR CUSTOMERS, aligning on a definition of success, and building a success culture, we feel it's important to think of digital's future and the possibilities of innovation.

That's why we focus on growing capabilities within a company that help drive business value for the long term. These two facets of our approach transform companies from reactive silos into agile, cohesive teams.



BUILD SUCCESS CAPABILITIES

AFTER WORKING WITH THOUSANDS OF ORGANIZATIONS, we've noticed four common characteristics across the most successful: They build inspired teams, they are customer obsessed, they focus on rapid execution, and they are purpose-driven. Each of these characteristics rests on a foundation of equally valuable capabilities.

As part of our approach, we help our customers identify the best capabilities for their needs. Once the right capabilities are identified, we develop strategic programs that extend these capabilities and make them a part of a company's daily operations. This allows companies to build a success culture and continue to advance even as the industry landscape evolves.



THE 10 SUCCESS CAPABILITIES

CHARACTERISTICS	CAPABILITIES	DEFINITION
INSPIRING TEAM	Empowering Leadership	Leaders have a common vision that unifies and brings out the best in people in the organization.
	Digital DNA	Employees are constantly looking for ways to competently solve business problems with digital technologies.
	Collaborative Culture	People work in a coordinated way that promotes mutual excellence and accountability.
CUSTOMER OBSESSED	Inspiring Designs	Products and services are designed so customers love them.
	Single View of Customer	Holistic and seamless customer experiences.
	Rapid Innovation	Resources and abilities to launch continuous breakthroughs and product/service improvements to the market.
ACCELERATED EXECUTIONS	Decisive Roadmap	Clear decisions that drive timely action on priorities.
	Connected Systems	Platforms and systems automate and maximize the use and flow of data.
	Continuous Learning	Fast execution and fast learning through data, feedback, and training to refine the approach.
PURPOSE-DRIVEN ORGANIZATION	Shared Values	Organization has a clear set of values and purpose that compels it into a better future.

DEFINE METRICS AND DRIVE VALUE

DRIVING VALUE FOR OUR CUSTOMERS

is the reason behind every step of our approach. One of the keys to ensuring customer success is to define pivotal success metrics and continually measure progress. We use cutting-edge data and Einstein Analytics to accurately see where our customers are headed based on their value metrics and adjust as necessary. Defining specific

value markers and actively pursuing them help our customers accomplish both long- and short-term goals without losing sight of the day-to-day operations.

To see this process in action, read the AAA Carolinas success story on the next page.



AAA CAROLINAS SUCCESS STORY



“Folks on the front lines have always worked in the dark; it’s been about their relationship with a member, not our relationship. Salesforce helps us bridge that gap.”

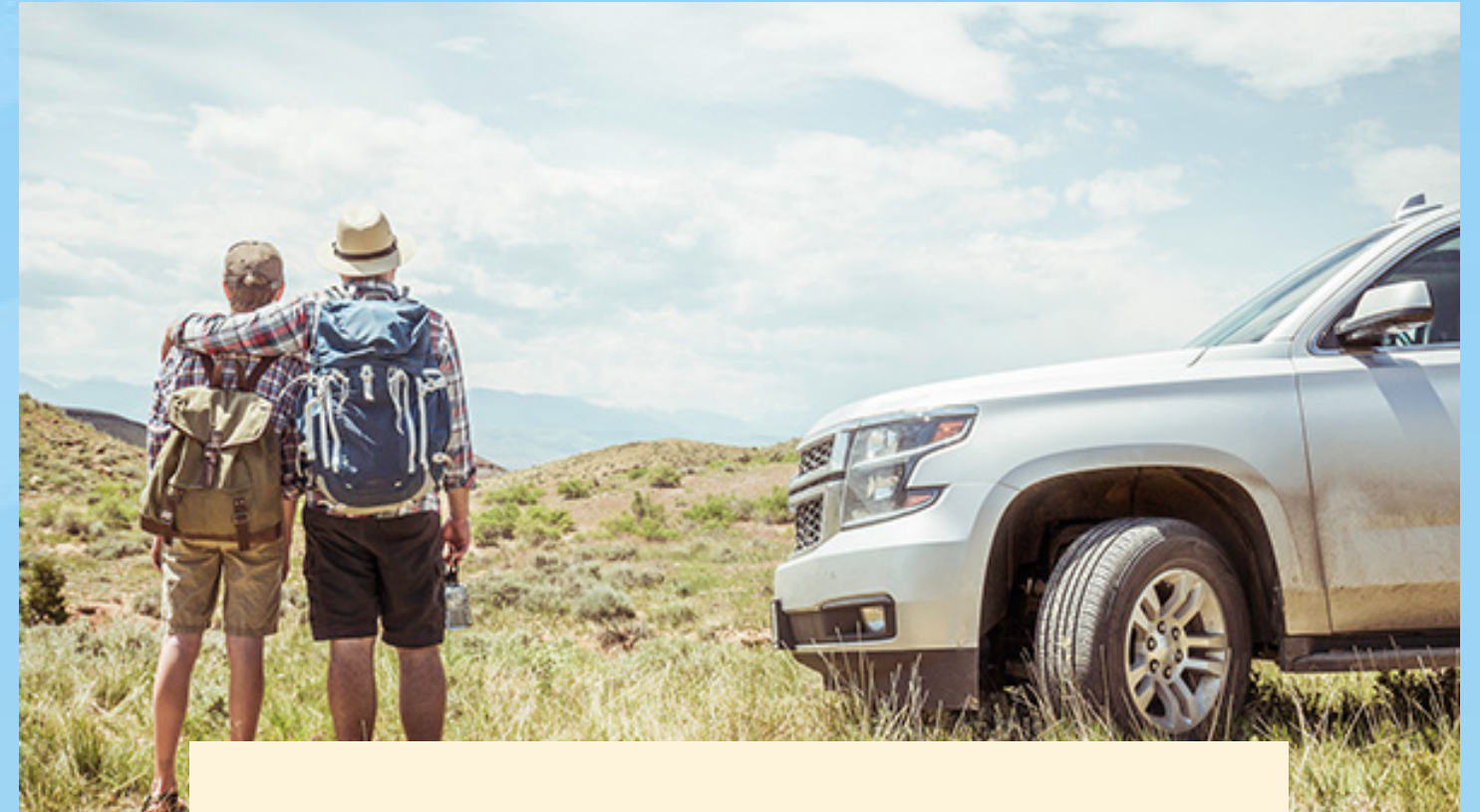
RICHARD SEXTON, CHIEF MARKETING OFFICER, AAA CAROLINAS

THE CUSTOMER SUCCESS PLAYBOOK IN ACTION: AAA CAROLINAS

AAA Carolinas, a regional AAA group, knew it needed guidance if it was to create a more modern, valuable experience for its customers. To do that, AAA Carolinas had to consolidate data into a single member profile and promote cross-team collaboration.

AAA Carolinas tapped Salesforce Architects, who helped it:

- Identify the areas of opportunity
- Align on a definition of success
- Create a roadmap for building a single view of its members



AAA CAROLINAS + COMPASS

Using the Salesforce Compass approach to success, AAA Carolinas saw a **330% increase** in member engagement and a **54% reduction** in service response time. To read the full story of how AAA Carolinas became a customer company, visit

salesforce.com/customer-success-stories/aaa-carolinas

CONCLUSION

Every success story is unique, but having a solid framework can help companies accomplish their vision even faster. Our goal is to make every company customer-centric, and our Compass approach is a proven foundation for making that possible.

We hope you'll take advantage of these first steps and use them to start the conversation around transforming the way you do business. When you're ready for more help, the Customer Success Group is here to guide you on your journey to becoming a customer-obsessed company.

To learn more about how the Customer Success Group and Success Cloud can help your company blaze a new trail, contact your Salesforce Account Executive, Success Lead, or call 1-844-275-4239 for more information.

