CLOUD VISION TECHNOLOGIES

Customer Success Management



The Best Training Institute in Hyderabad

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#Samhitha Enclave, 3rd Floor, KPHB Phase 9, Kukatpally, Hyderabad, Telangana - 500072

Module 1: Customer Success Ecosystem & SaaS Business

Customer Success Foundations

- Evolution of Customer Success
- Customer Success Mindset
- Why Companies Invest in Customer Success
- Customer Success as a Revenue Function
- Customer Success Lifecycle
- Customer Journey Mapping
- Customer Experience (CX)
- Voice of Customer (VoC)
- Customer Value Realization

SaaS Business

- Syntactically Awesome Style Sheets (SaaS) Fundamentals
- Cloud Business Models
- Subscription Economy
- B2B SaaS
- B2C SaaS
- Product-Led Growth (PLG)
- Customer-Led Growth (CLG)
- Annual Recurring Revenue (ARR)
- Monthly Recurring Revenue (MRR)
- Lifetime Value (LTV)
- Customer Acquisition Cost (CAC)
- Churn
- Net Revenue Retention (NRR)
- Expansion Revenue

Business Fundamentals

- Understanding Business Goals
- Business KPIs
- Revenue vs Profit
- Business Value Creation

Practical

- Customer Journey Workshop
- SaaS Business Canvas
- Customer Lifecycle Mapping

Module 2: Customer Communication, Psychology & Business Excellence

Communication

- Business English
- Executive Communication
- Business Writing
- Professional Email Writing
- Chat Communication
- Call Communication
- Meeting Management
- Presentation Skills

Psychology

- Customer Psychology
- Emotional Intelligence
- Active Listening
- Building Trust
- Handling Expectations
- Stakeholder Mapping
- Customer Personas
- Negotiation Skills

Customer Relationship

- Customer Satisfaction
- Customer Loyalty
- Customer Advocacy
- Relationship Building

Practical

- Email Writing Lab
- Live Customer Calls
- Executive Meeting Simulation
- Difficult Conversation Practice

Module 3: Customer Onboarding, Adoption & Customer Education

Discovery

- Discovery Calls
- Requirement Gathering
- Success Criteria
- Customer Goals

Onboarding

- Kick-off Meetings
- Customer Onboarding Framework
- Implementation Planning
- User Activation

Adoption

- Product Demonstration
- Customer Education
- Webinar Delivery
- Knowledge Base
- Adoption Metrics
- Success Planning
- Quarterly Business Review (QBR)

Practical

- Product Demo
- Onboarding Project
- QBR Presentation

Module 4: Customer Health, CRM & Customer Intelligence

Customer Health

- Health Score
- Product Usage
- Customer Segmentation
- Success Metrics
- Risk Detection
- Churn Indicators

CRM

- CRM Fundamentals
- Salesforce
- HubSpot
- Zendesk
- Freshdesk
- Customer Timeline
- Contact Management
- Workflow Automation
- Ticket Management

Analytics

- Excel
- Google Sheets
- Dashboards
- Reports
- Executive Reporting

Practical

- CRM Lab
- Dashboard Creation
- Customer Health Analysis

Module 5: Customer Retention, Growth & Business Strategy

Retention

- Churn Prevention
- Renewal Management
- Customer Expansion
- Upselling
- Cross-selling

Strategy

- Customer Success Strategy
- Customer Success Playbooks
- Success Roadmaps
- Customer Success Operations
- SOP Development
- Risk Management

Practical

- Renewal Strategy
- Success Playbook
- Customer Recovery Plan

Module 6: AI-Powered Customer Success

AI Foundations

- AI Fundamentals
- Prompt Engineering

AI Applications

- AI Email Writing
- AI Meeting Summaries
- AI Call Summaries
- AI Chatbots
- AI Knowledge Base
- AI Sentiment Analysis
- AI Customer Insights
- AI Workflow Automation
- AI Productivity

Practical

- AI Customer Assistant
- AI Workflow
- AI Email Automation

Module 7: Customer Success Leadership & Career Development

Leadership

- Ownership
- Decision Making
- Problem Solving
- Conflict Resolution
- Crisis Management
- Time Management

Career

- Applicant Tracking System (ATS) Resume
- LinkedIn Optimization
- Personal Branding
- HR Interview
- Customer Success Interview
- STAR (Situation, Task, Action, Result) Method
- Salary Negotiation

Practical

- Resume Review
- LinkedIn Review
- Mock Interview

Module 8: Customer Success Capstone

Students become Customer Success Managers for a simulated SaaS company.

They perform

✓ Discovery Call
✓ Customer Onboarding
✓ Product Demo
✓ CRM Management
✓ Customer Health Analysis
✓ Renewal Planning
✓ Churn Prevention
✓ Executive Review
✓ AI Communication
✓ Customer Recovery
✓ Business Presentation

Deliverables

- Customer Journey Map
- Customer Success Plan
- Customer Relationship Management (CRM) Portfolio
- Dashboard
- Executive Report
- AI Workflow
- QBR
- Final Presentation

CLOUD VISION TECHNOLOGIES

OUR HIGHLIGHTS

- Industry Expert Trainers
- Per Batch 10 Students (Offline & Online)
- Weekdays & Weekend Classes
- State - Of - The Art - Infrastructure
- Practice Test & Mock Interviews
- 100% Placement Assistance*
- Course Completion Certificate

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