

Customer Success Plan Template

Your cheatsheet for building a winning CS plan

by  Flowla

What is a customer success plan?

A [customer success plan](#) is a roadmap designed by a company to help customers achieve their key goals with the product or service they purchased. It's a strategic blueprint for making your new clients successful and building a positive, long-term relationship.

Customer success planning aims to deliver a consistent customer experience and allow for smooth product adoption, shortening the time to value.



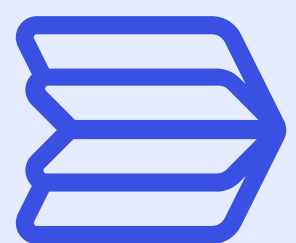
What are the benefits?

- Higher customer retention rate as satisfied customers are less likely to seek alternatives.
- Better customer loyalty and advocacy who champion your brand.
- Increased customer lifetime value with long-term relationships.



Who should own it?

1. Customer success manager or customer service team in general
2. Customer relationships manager
3. Onboarding specialist (e.g., client onboarding manager) or a dedicated implementation specialist (at certain stages of the customer's journey)



How to manage your CS plan?

Most CS teams use simple spreadsheets or project management tools to create and carry out a plan. But there are more convenient and capable solutions you can adopt. Tools like Flowla allow all involved parties to work together in building mutual action plans, offering a visual representation of the steps and action items involved.

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10 key elements to include

If you know the key components, you can build your own framework tailored to your business processes and convenient to use.

01

Goals and objectives

- What are the customers' pain points and problems?
- What do they aim to achieve with your help?

02

Key milestones

- What are the checkpoints where achievements or progress can be measured?

03

Action items

- What are the tasks to complete - the steps toward the set goals?

04

Timeline

- What are the expected duration/deadlines for each phase of the customer success plan?

05

Success criteria

- Where are the measurable criteria (quantitative metrics) to indicate the success of the project?

06

Roles and responsibilities

- What are the responsibilities of each stakeholder involved in the customer success plan?

07

Reporting and feedback

- What is the frequency, format, and recipients of the progress reports?
- How will feedback be collected, analyzed, and utilized?

08

Communication plan

- When will you have regular check-ins?
- What are the communication channels to be used?

09

Education and training resources

- What are the resources and materials required to support the customer?

10

Toolset

- Which software will be during for the project?

Best practices for customer success planning

Things to keep in mind and pro tips for effective customer success planning.



Set the goals and KPIs collaboratively to ensure that both parties are aligned and foster a sense of shared ownership in the success journey.



Actively seek and gather customer feedback, whether through surveys, interviews, or informal conversations and promptly address any issues they voice.



Monitor your progress and be prepared to make adjustments to the success plan as needed. Flexibility is key to adapting to changing circumstances.



Foster collaboration across different departments within your organization. A cross-functional approach ensures that the entire team is working in harmony to support CS.



Document the customer success plan and all related materials to ensure knowledge sharing within your team and ensure consistency if team members change.

How to create an effective customer success plan?

1. Map your customer journey

Outline each stage of the customer lifecycle, from onboarding to loyalty and advocacy.

2. Identify customer goals and objectives

Find out what success looks like for the customer and align on their expectations.

3. Outline milestones and action items

Lay out key milestones that mark significant achievements in the customer journey.

4. Define the timeline for implementation

Set a realistic timeline to fulfill your customer success plan.

5. Set criteria and key metrics for success

Establish clear success criteria that serve as benchmarks for achieving customer goals.

7. Pick supporting resources and tools

Arm your team and customers with the right resources and tools.

6. Align internal teams to support the efforts

Assign roles and responsibilities across internal teams to ensure a collaborative approach.



Turn your CS plan into a collaborative flow

See the entire journey at a glance, set deadlines, assign tasks, and track progress effortlessly.

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