



Agenda

- Introduction
- Zero down // Level Setting
- CS Organization overview
- Importance of business reviews.
- Reality & What goes wrong in a business review
- Mental Model for Business Reviews
- Q&A

SAAS is easy to Subscribe & easy to Unsubscribe.

-Prashant Singh / Churn Control

Let's Zero Down and Level Set

SAAS

Business Reviews

Account Segmentation

Challenges

Share SAAS Analogy.

Regular meetings between you and your clients to discuss the relationship, performance, and future plans. **Global Enterprise**

Enterprise

SMB

B2C

New Use case discovery

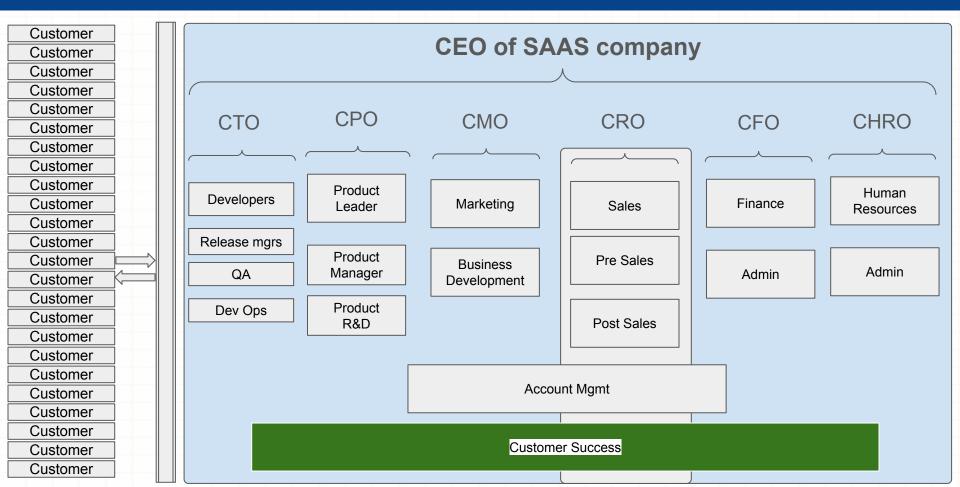
Around Accounts \$

Around Product

Around delivery

Getting hold of the sponsor.

Key Roles in a SAAS Company



Why Business Reviews are important

Business Reviews are formal in-person or virtual meetings with the champion, the sponsor and all key stakeholders to

- Demonstrate current engagement status
 - a. Shared progress on agreed/promised/committed value.
- Call out GAPS between current efforts from both side &
 - a. Share actionable next steps with timelines and ownership.
- Share best practices, recommendation to multiply value.
- Demonstrate ROI.

Reality

- A CSM has 10 to 20 or may be more large or enterprise accounts.
 - a. CSM writes email to the customer to connect so that they can talk about this.
 - b. CSM & his manager/director writes separately to the business sponsor to seek his/her time for the business review.
 - c. At times the sponsor joins and at time he doesn't join.
- Some customers are not serious about the business review.
- Account management team also needs 10 minutes of time to present during business review.
- CSM captures notes, talks about support tickets, escalations and at times the conversation goes unfavorably divergent.
- We run out of time.
- Next business review not sure, when it will happen.

What goes wrong in a business review

- Poor introductions.
- Over friendly or over professional conduct over the call.
- No clear objectives or outcomes.
- Call control and lack of assurance on the call.
- CSM / CSM Manager sounding depleted, repetitive and not adding all stakeholders.
- Poor time management.
- Missing body language.
- Customer is confused about the value received.

Some common issues

- Nothing new to talk about in the business reviews.
- We just had a business review in november and now its jan, why do we need to do it again?
- Customer has many open issues CSM has still not resolved them, not sure if a business review will be helpful or will invite more trouble.
- If I do not conduct business review then I will miss on my KPIs.

Portfolio dynamics

- 20-30% of the customer are not serious on business reviews and do not provide a slot to conduct a business review.
- Some customers prefer it to be monthly some prefer for quarterly business reviews.
- Some customer are not responsive at all.
- Very old settled customers, they want to be left alone. Don't want to get bothered.

What goes wrong in a business review

- Poor introductions.
- Over friendly or over professional demeanor on the call.
- No clear objectives or outcomes.
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- CSM / CSM Manager sounding depleted.
- Missing body language.

Mental Model for Business Reviews



While	creating	the	deck
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While presenting the deck

DRIVE

SHARE

Data-driven insights

Success stories

Relationship building

High-level overview

Influence and persuasion

Actionable recommendations

Value proposition alignment

Relationship building

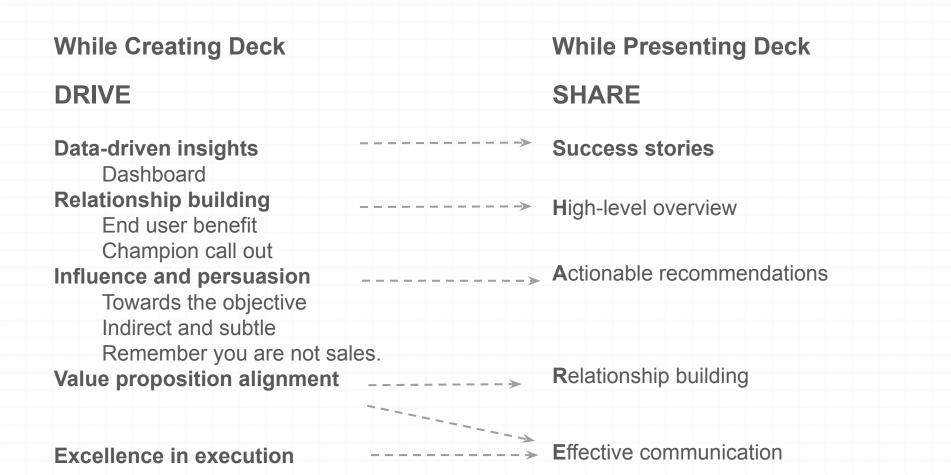
Excellence in execution

Effective communication

What does it mean?

Mental Model for CS Business Reviews





Preparation is the key

Pre Work

Get your sides before time.

Dry run the content.

Share the content with cross functional teams ahead of time,

Don't be shy or do things in a SILLO.

Be aligned with ORG Goals

Prepare introduction, for self, your manager, cross functional teams

During

Story Telling

Story Telling.

The ""USE CASE"" is the HERO.

Delays and lack of collaboration is the Villain.

Customer side champion is your SideKick

Post Business Review

Executive Summary

MoMs

Agreed steps

Suggested timelines for the upcoming things.
Create tips

Post Business Review

Outcomes	Actionable next steps
Achieved / Not Achieved	New use case discovery
Customer Input	Product Adoption
Feedback:	Renewals
Risks and Opportunities	CSM Engagement
Risks:	- Next QBR
	Next CadenceNext updation
Opportunities:	- Timelines

SAAS is easy to buy & easy to cancel.

-Prashant Singh

Thank you!

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