

Sales Win after Customer Success Plan Highlights Business Case

Client Engagement Outcomes for a Domestic Manufacturer

Problem.

The vendor's sales team had attempted to land a new managed services contract with an existing client, but after a year of solicitation, the deal appeared dead.

The vendor had a solid working relationship with the client's technology support team who knew they required more support services, but they could not convince senior leadership that the investment was needed.



Solution.

The client engagement program was introduced by the vendor and the client engagement executive (CEE) initiated a systematic framework to strengthen the relationship and unearth the client's perspective of value related to their own business direction.

The CEE facilitated **the Strategic Client Workshop** with the client's technology team and senior leadership, in which an interactive and deep discussion drew out the executives' vision and connected the activities for which both the client's team and the vendor needed to prioritize.

A Customer Success Plan with measurable business-value KPIs was defined. In subsequent quarterly business reviews progress against the plan was transparently reported, leading to strategy-driven discussions.



Outcome.

After one quarterly business review, the Customer Success Plan and adjacent KPIs revealed gaps in the client's support capacity, validating the client team's request for additional services from the vendor.

Senior management was able to clearly identify the use case for an investment, and enthusiastically agreed to the contract sales had been positioning for over a year.

The client gained the high level of support they required to succeed, and the vendor gained the business they thought they had lost.

