# Allstacks

**YOUR** COMPANY

# Customer Success Kickoff

## DATE

# AGENDA

- Introductions
- Onboarding + Customer Journey
- What We Heard + Success Criteria
- Standard Dashboards and Metrics
- Mutual Success Plan
- Next Steps

## △ Customer Journey

| Onboarding | Adoption | Value Realization | Advocacy |
|---|---|---|---|

**Onboarding**
- Tools and Account Set up
- Understand Customer's focus areas of improvement and success criteria
- Team/Executive/ Admin training

**Adoption**
- Roll out to all teams
- Partnership and engagement from customer champion.
- Consistent utilization.
- Find team baselines.
- **Use the power for good!**

**Value Realization**
- Hit success milestones.
- Ability to use Allstacks data to drive boardroom and team conversations.
- Improvements in processes and team health.

**Advocacy**
- Allstacks Champion
- Developing a feedback loop, share successes, and have a continuous partnership

# What We Heard
# vs.
# What You'd Like To Accomplish

# What We Heard?

- Summarize "What We Heard" slide from Trial recap or other sales driven slidedecks, account plan, handoff doc, etc.

# Success Criteria

**What do you want to see/experience by 30, 60, 90 days?**

- **By Day 30**
    - Complete team trainings
    - Find initial baseline metrics
    - Set goals for 60 day milestone

- **By Day 60**
    - Hit first milestone
    - Experiencing some org process improvements

- **By Day 90**
    - Quarterly business review
    - Starting to see consistency amongst all teams

# Standard Dashboards and Metrics

Insert 1-2 screenshots of customer's training dashboard template

# QBR Dashboard *

**Current Quarter:**

- **Median story cycle time of __ days**

- **Avg PR cycle time of __ days**

- **add two other metrics based**

- **on what we heard was important**

**Next Quarter:**

- **Median story cycle time of __ days**

- **Avg PR cycle time of __ days**

- **add two other metrics based**

- **on what we heard was important**

* Standard metrics. We can measure other metrics if desired.

# Next Steps

# Mutual Success Plan

**Allstacks Ownership:**

- All initial configuration
    - Rosters, Dashboards

- Initial Trainings
    - Direct contributor managers
    - Managers of managers

- Named CSM
- Dedicated Slack/Teams Channel
- Additional support/meetings as needed
- Monthly office hours
- Quarterly business reviews

**Customer's Ownership:**

- Dedicated tool owner/ main point of contact

- Identify process change owners
    - PMO/TPMs/Agile Practitioners

- Executive sponsor QBR participation

- Ongoing platform maintenance with our guidance
    - Rosters
    - New Dashboards

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# Next Steps

- **Progress so far..**

  - Tools connected:
    - ==Add tools that have been connected==
  - Trial workspaces and rosters
  - Establish foundational team and archetype metrics

- **Next Steps:**

  - Finalize Setup:
    - Update Roster - by ==Set a due date for completion==
    - Other tools to connect - ==Omit if all their tools are already connected==
  - Executive and Admin training by ==set due date ~2 weeks from kickoff==
  - First Team/User Training by set due date ==~3 weeks from kickoff==
  - Weekly Touch Base
  - Schedule Quarterly Business Review (==Send placeholder ~3 months from kickoff==)

# Questions?