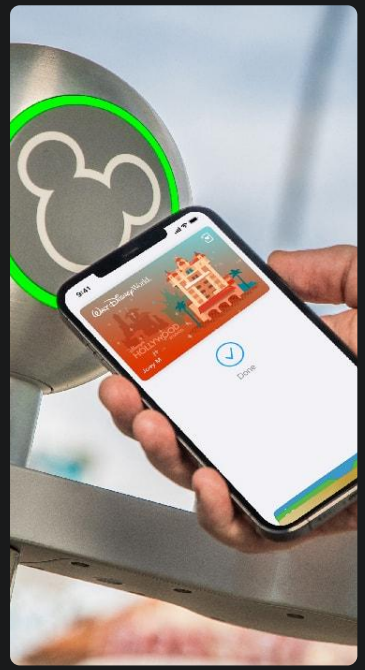
Value *Acceleration*

The Future of Customer Success is ***Composable***

Totango

Welcome to Miami!

Who wants to go to Disney World?



Disney World

A magical customer journey is the outcome of an incredible product

Let’s zoom out

Your customer journey
is the product

Customer success is the central life force of recurring revenue growth

How loyalty is earned

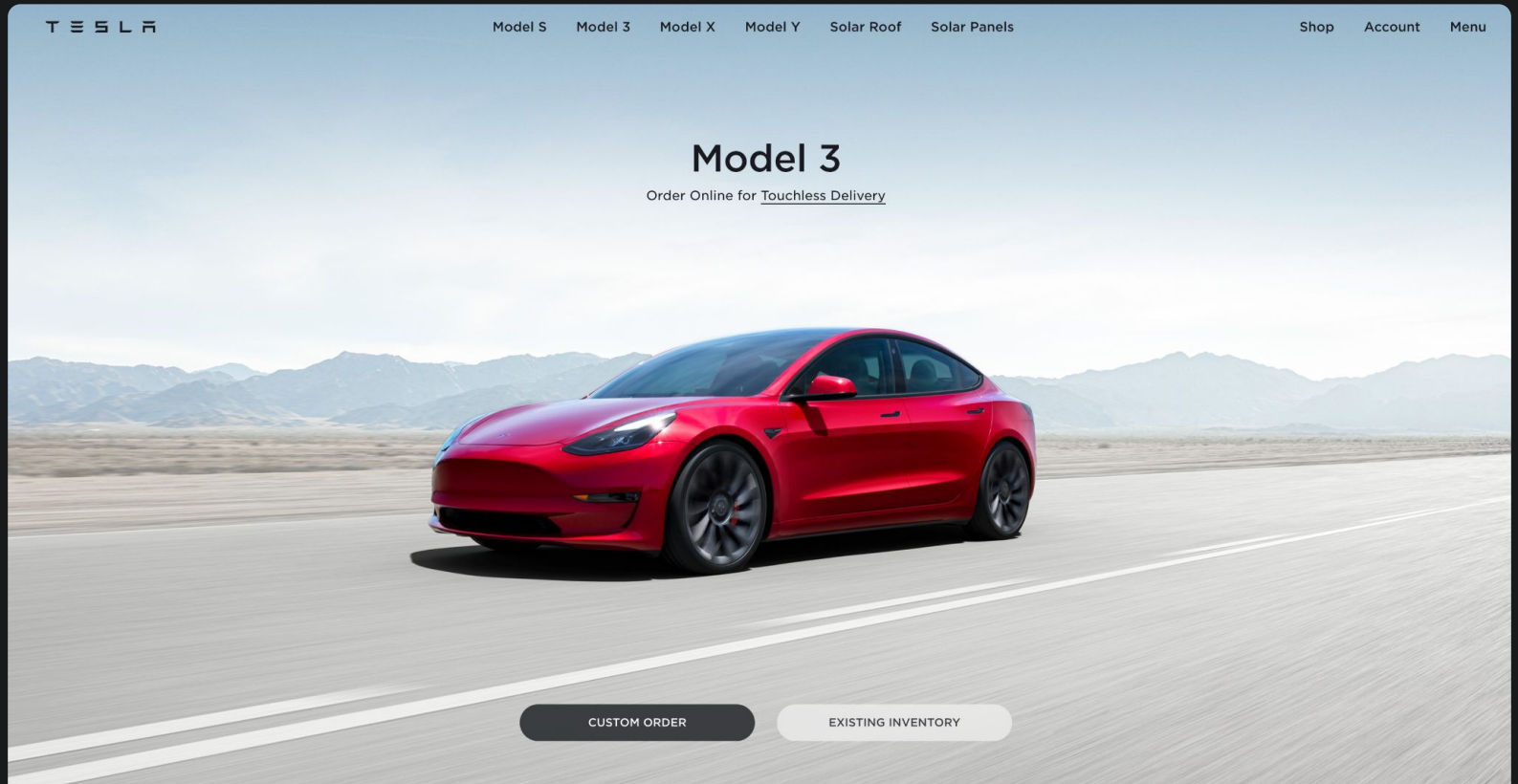
Where moments are won

How recurring revenue multiplies

Apple

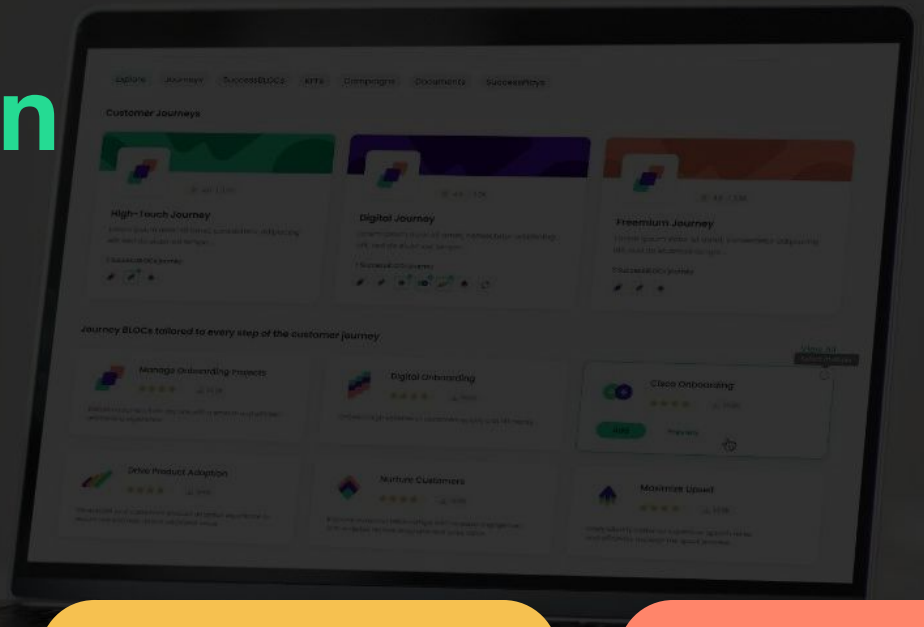
Apple manages its in-store experience as a product

Digital First • Self Service • Product Led



Value-driven customer journey

Remove Friction to Value



Digital First

Self Service

Product Led

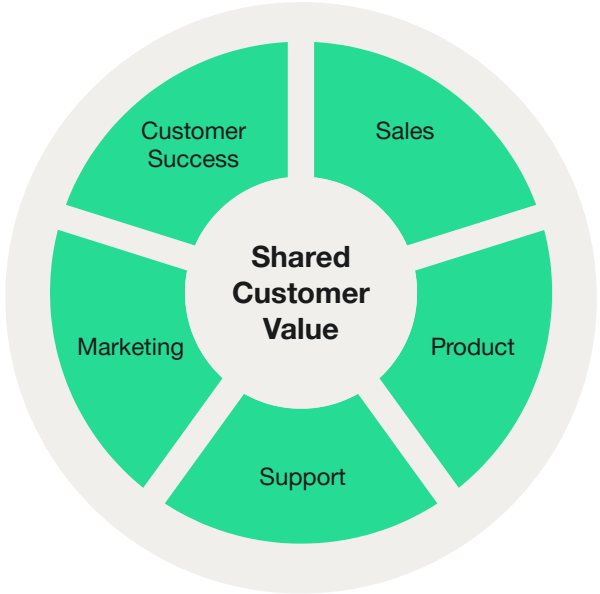
Totango

The value-driven journey is shared

Shift to a different operating model

Acquisition-Driven

Value-Driven

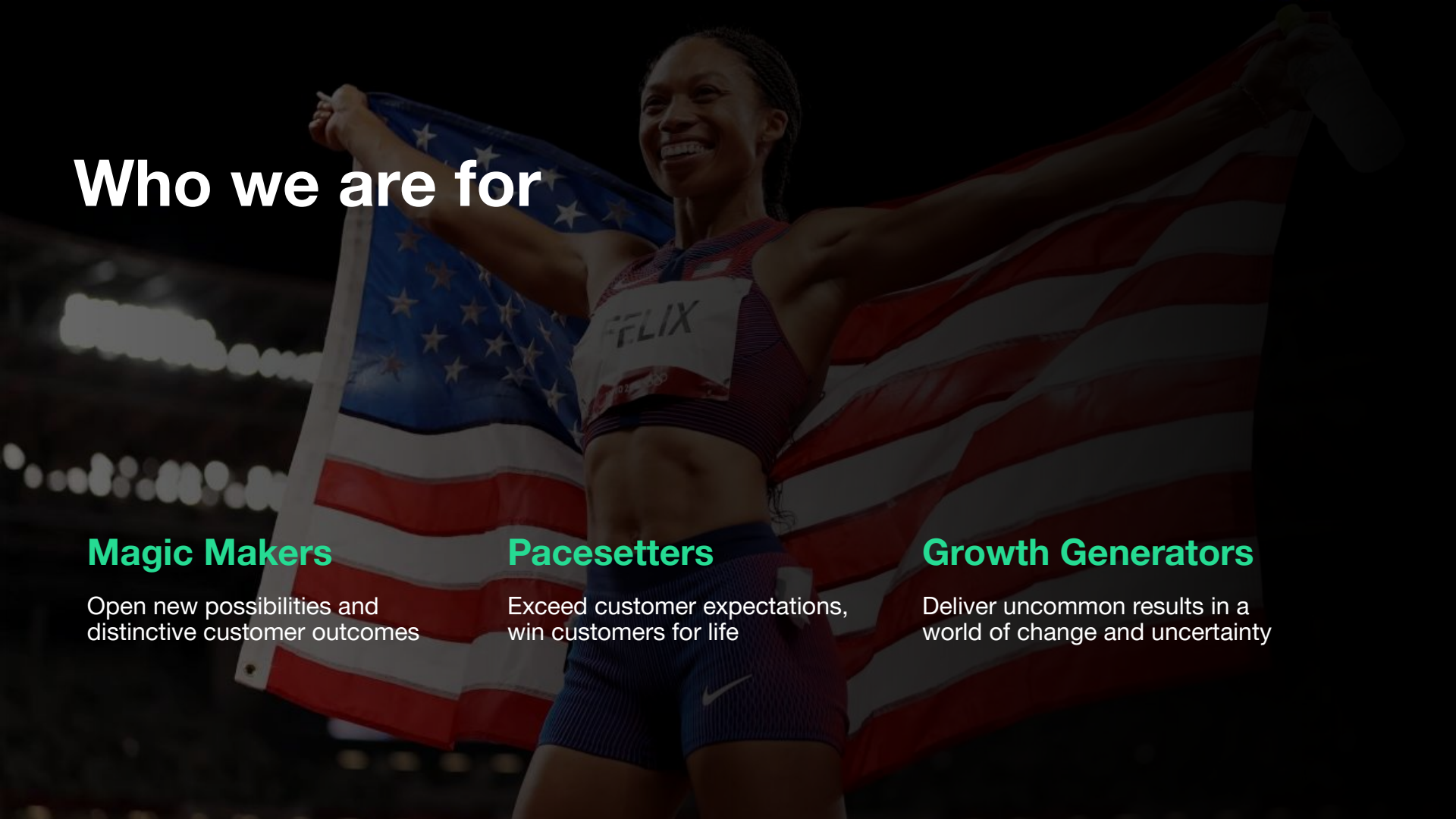


Your customer journey is a product that always evolves

1 Year Anniversary

$100M investment in Customer Success **Innovation**

Who we are for



Magic Makers

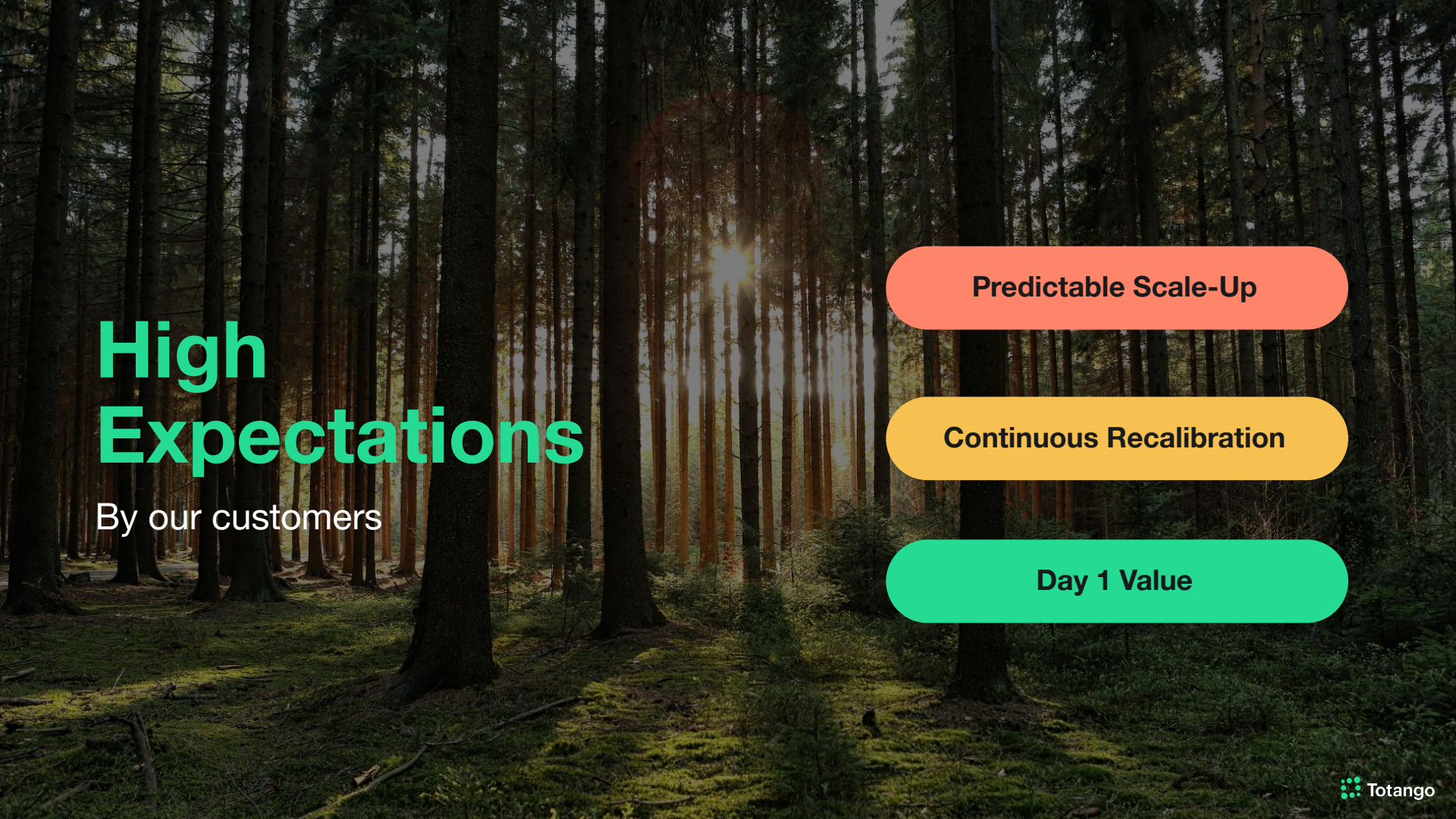
Open new possibilities and distinctive customer outcomes

Pacesetters

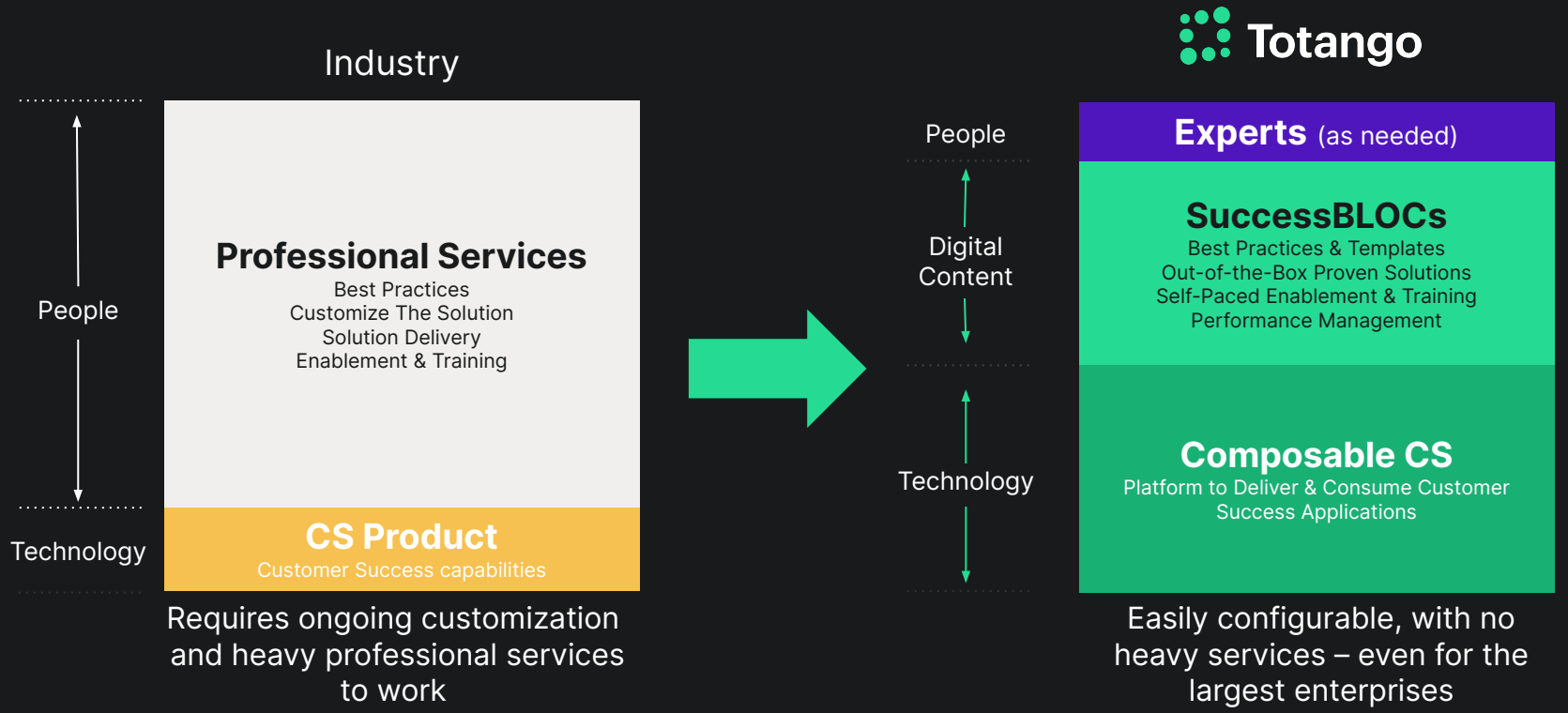
Exceed customer expectations, win customers for life

Growth Generators

Deliver uncommon results in a world of change and uncertainty


High Expectations
By our customers
Predictable Scale-Up
Continuous Recalibration
Day 1 Value
Totango

Accelerating Customer Success by Removing Friction



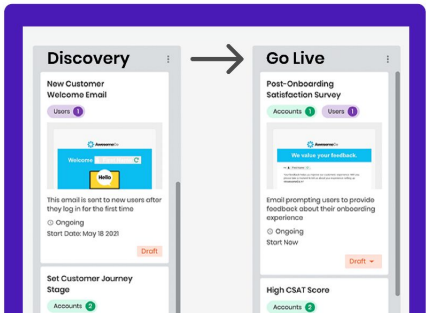
So, you can win with inspiring journeys

Onboarding | Expansion | Adoption | R

Manage Onboarding Projects

High touch program for Enterprise. Launched 6/2020.

Managed by Katie John



Mid market (7)

Manage Cross-sell

Hub for identifying and managing EMEA cross-sell opportunities.

Managed by Kristen Bailey

Maximize Ent. Upsell

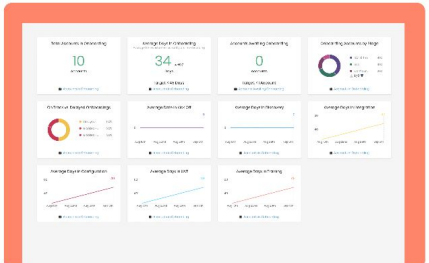
Proactively identify and close more expansion opportunities

Managed by Kristen Bailey

MM Executive Dashboard

High level dashboard with overall account KPI, risk mitigation and expansion opportunities.

Managed by Kristen Bailey and MM team.



Resolve Esc

End to end pro and resolve Tie

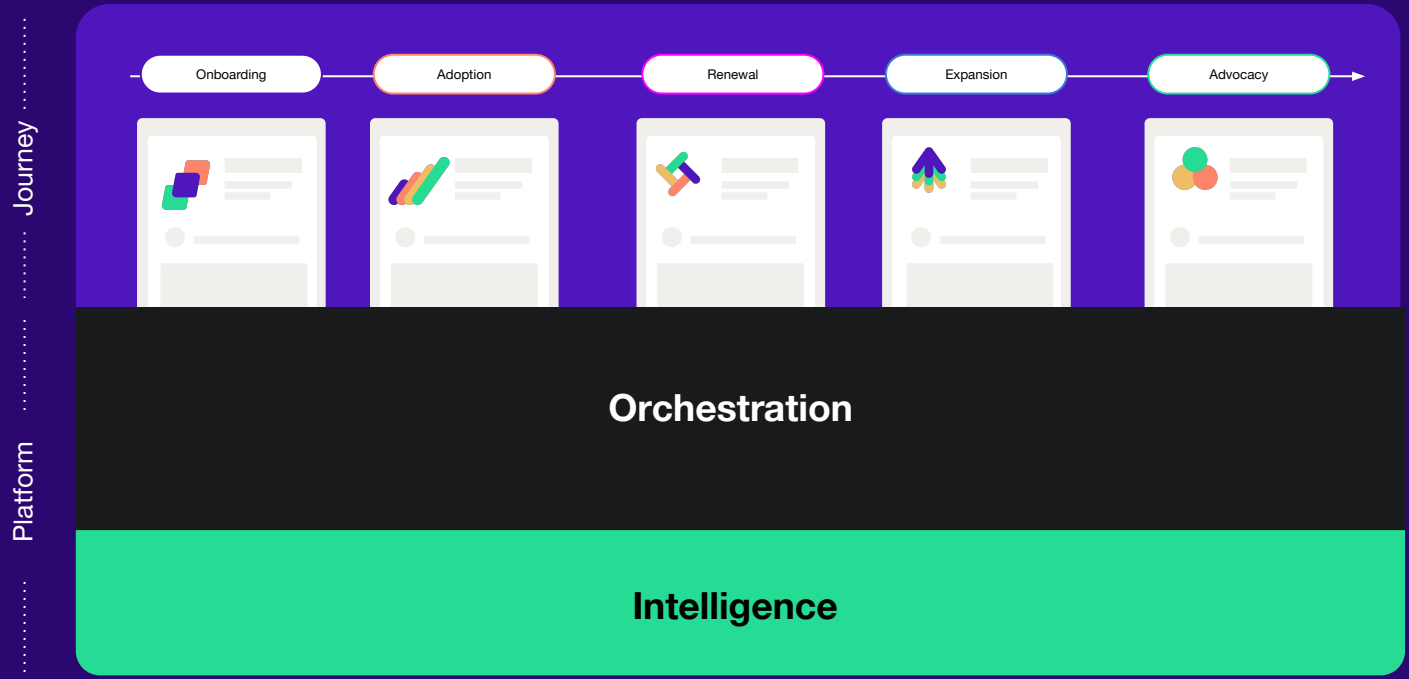
Manage and Esc

Automate R

Automate ren 30-60-90 day

Manage and Ren

Totango Composable Customer Success Platform



Outcome First • Modular • Embedded Intelligence

Totango

Composable Customer Success

Outcome First
Modular
Embedded Intelligence

1 Modular Building Blocks

2 Unified Design & Run

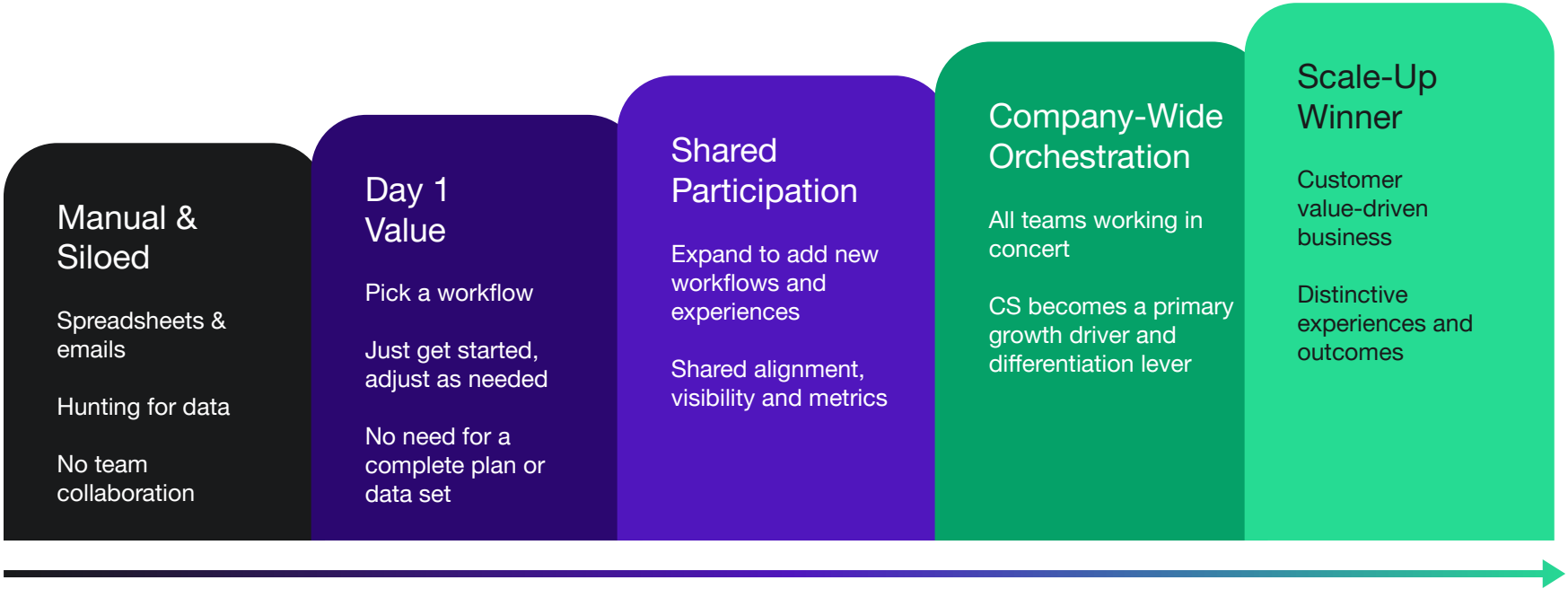
3 Multidimensional Customer View

4 Outcome-First Design

5 Embedded Best Practices

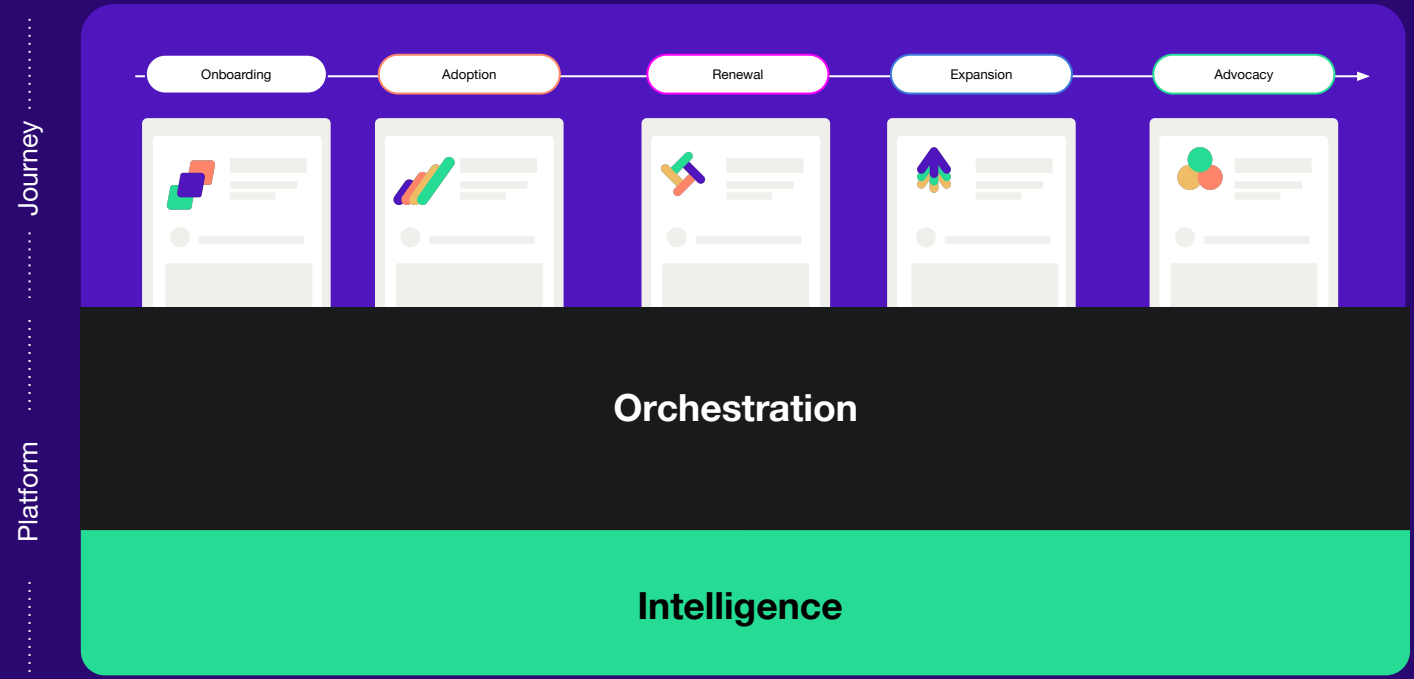
6 Friction-Free Orchestration

Start where you are and go

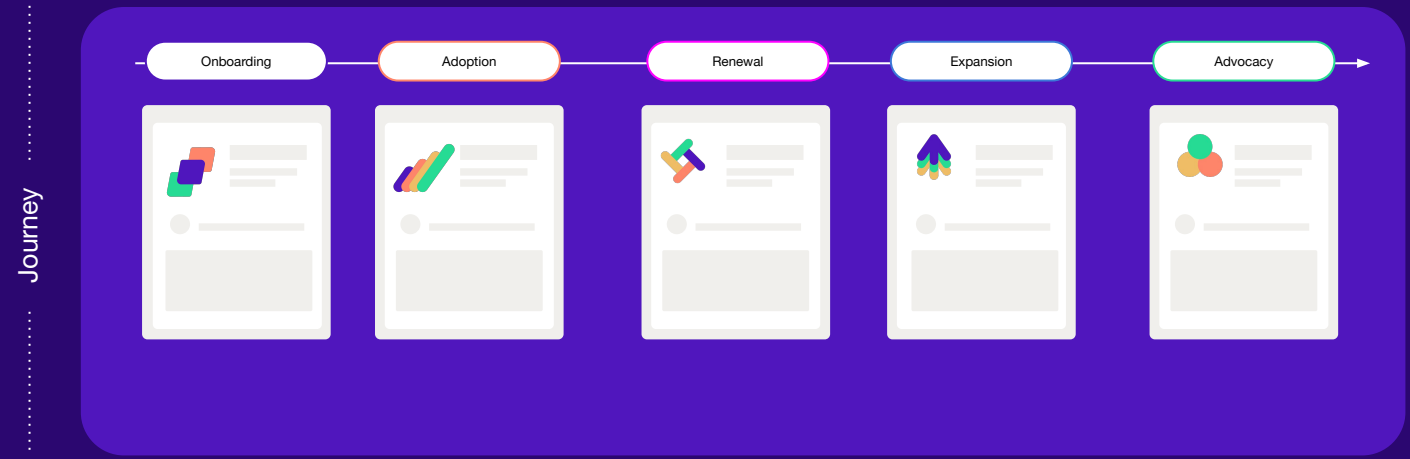


Composable CS Maturity Model

Totango Composable Customer Success Platform



So, you can win with impactful journeys



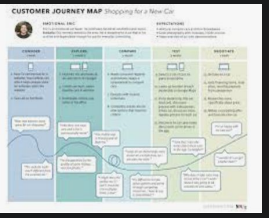
These learnings inspired us to innovate…

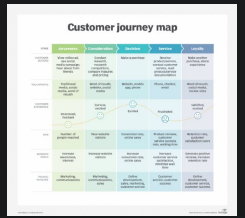
Totango

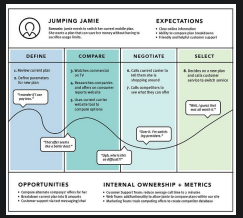
New design paradigm that you'll love!

Totango

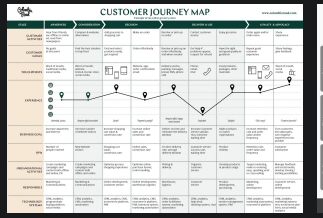
Your customer journey
is the product

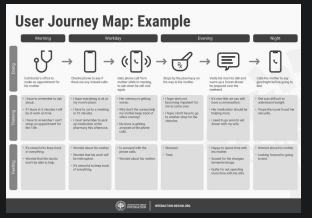

CUSTOMER JOURNEY MAP Shopping for a New Car

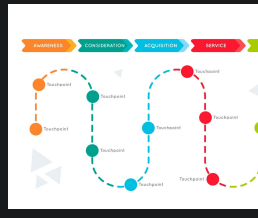

Customer journey map

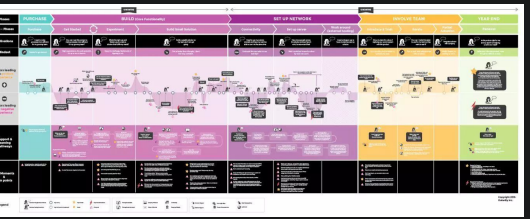

JUMPING JAMIE
EXPECTATIONS
DEFINE
COMPARE
NEGOTIATE
SELECT
OPPORTUNITIES
INTERNAL OWNERSHIP + METRICS

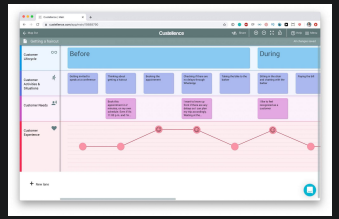
TrendSpot | Online Shopping
Customer Journey Map

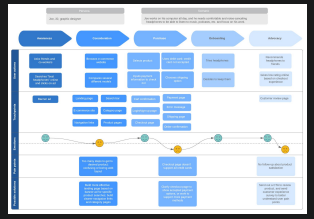

CUSTOMER JOURNEY MAP

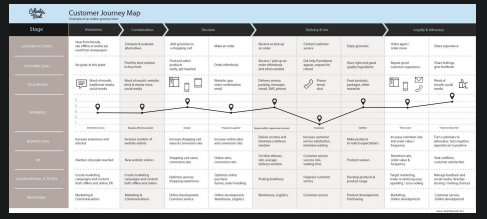

User Journey Map: Example

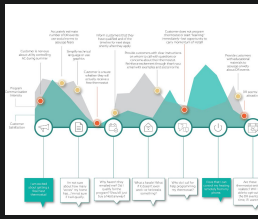

AWARENESS
CONSIDERATION
ACQUISITION
SERVICE
RETENTION

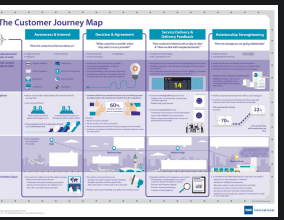


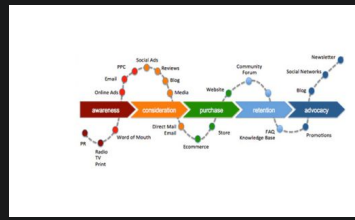

Customer Journey Map
Before
During

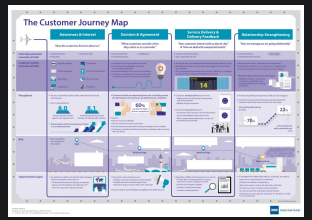



Customer Journey Map

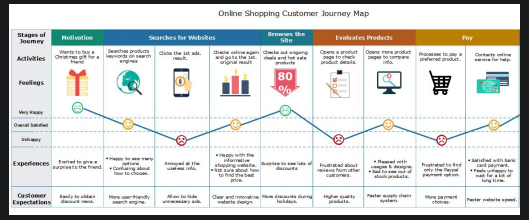


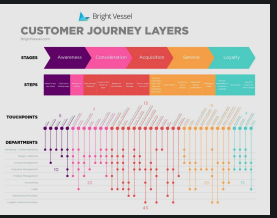

The Customer Journey Map

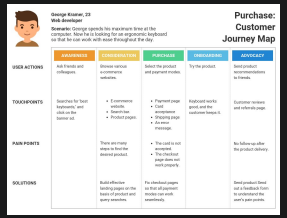

awareness
consideration
purchase
retention
advocacy

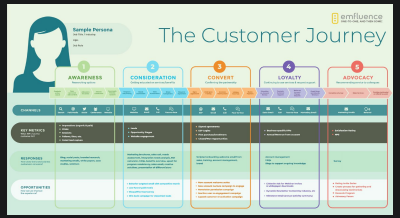

The Customer Journey Map

Customer Journey Map
SHOPPERS CONFIDENTIAL

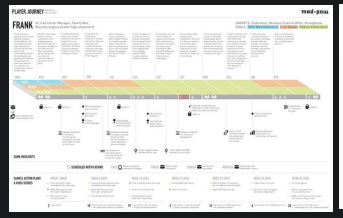

Online Shopping Customer Journey Map
Stages of Journey
Motivation
Searches for Websites
Browses the Site
Evaluates Products
Pay

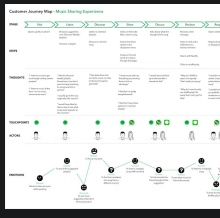

Bright Vessel
CUSTOMER JOURNEY LAYERS


Purchase: Customer Journey Map

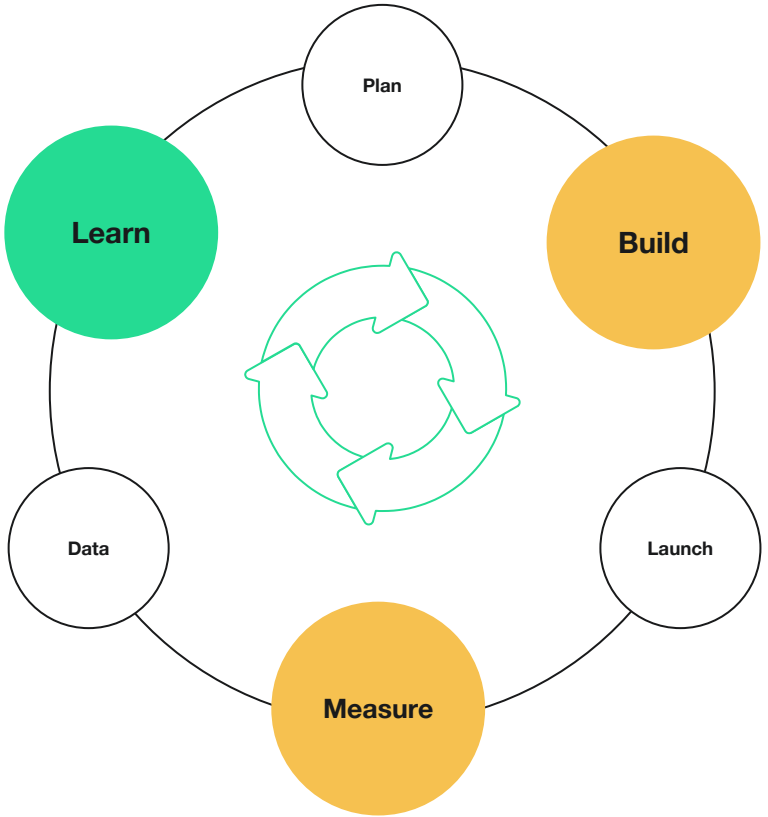

emfluence
The Customer Journey

The Customer Journey
2 Engage
Value Hypothesis
4 Implement
Value Realization
6 Renew/Expand
& Advocate
Value Realization
1 Attract
Web Value Calculator
Quantified Case Studies
3 Win
Business Case
Developer
5 Validate
Case Study Builder


mad*pow
FRANK


Customer Journey Map - Music Sharing Experience

In order to move fast, you need to cycle through



Totango

Totango

Search

Upgrade

BK

Journeys\Manage Onboarding Projects

Manage Onboarding Projects

Onboarding

Scorecard | Canvas | Segments | Reports | Assets | SuccessPlays | Campaigns | Setup

All types + | All Statuses + | All Owners + | By Label +

3 Unmapped Cards

Kick Off

Sales to CS handover and knowledge transfer

2 accounts

Task
- Upload contract
- Update account info
- Another task
- And another task

Inactive

New customer welcome Email

2 users

One time
Start date: Aug 3 2022

+ Add 3 Cards

Discovery

Schedule and run discovery meeting

2 accounts

Task
- Schedule and deliver business discovery meeting
- Send discovery business Email

Inactive

+ Add 1 card

Implementation

Data Integration

2 accounts

Task
- Data Integration
- Data Design and post integration for a specific account

Inactive

Product Configuration

2 accounts

Task
- Complete Product Configuration

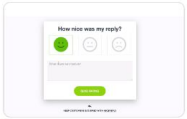
Inactive

+ Add 2 Cards

Go Live

Post - onboarding satisfaction survey

2 users



One time
Start date: Aug 3 2022

Inactive

High CSAT Score

2 accounts | 2 users

Task
- Upsell Opportunity
- Request resources
- Request resources

Inactive

+ Add 5 Cards

Onboarding Risks

Onboarding Delayed

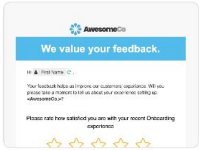
2 accounts

Task
- Data Integration
- Data Design and post integration for a specific account

Inactive

CSM outreach for onboarding delays

2 accounts | 2 users



One time
Start date: Aug 3 2022

+ Add 4 Cards

CX Canvas: The results speak for themselves

85%+

Of customers were in beta–our most popular beta EVER

70%

Of customers fully mapped and activated *at least one* journey

2x CAMPAIGNS **6x** SUCCESSPLAYS

Canvas users run 2x more campaigns and 6x more SuccessPlays

500+ Customer journeys have been shared by 200 businesses

Most popular customer journeys: Onboarding, Adoption, Voice of the Customer, Customer Nurturing, and Renewals

Totango

Customer journey

Totango

Search

Upgrade

BK

Welcome back Anne,

Acme Customer Journey

Choose a Life cycle type

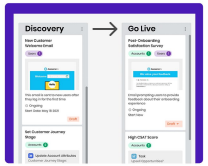
SaaS, Annual Contracts

Onboarding | Adoption | Renewal | Expansion | Advocacy

Manage Onboarding Projects

High touch program for Enterprise. Launched 6/2020.

Managed by Katie John



Draft

Last updated: Sep 10, 2022

1 SuccessBLOC | 6 Accounts

MM Executive Dashboard

High level dashboard with overall account KPI, risk mitigation and expansion opportunities.

Managed by Kristen Bailey and MM team.

Active

Last updated: Nov 3, 2021

Mid market (15)

IN | RV | DR | SB

Resolve Escalations

End to end process to drive, monitor, and resolve Tier 1 customer escalations.

Managed by Laura Roberts and Escalatioon team

Automate Renewals

Automate renewal process with 30-60-90 day engagement

Managed by Christina Low and Renewal Team.

Mid market (13)

Risk Detection

Get visibility into customer signals and critical events to detect risk.

Managed by Anthony Andrews

Risk Management

Mid market (7)

Manage Cross-sell

Hub for identifying and managing EMEA cross-sell opportunities.

Managed by Kristen Bailey

Maximize Ent. Upsell

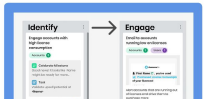
Proactively identify and close more expansion opportunities

Managed by Kristen Bailey

Maximize Upsell

Playbook for mid-market CS team

Managed by Kristen Bailey

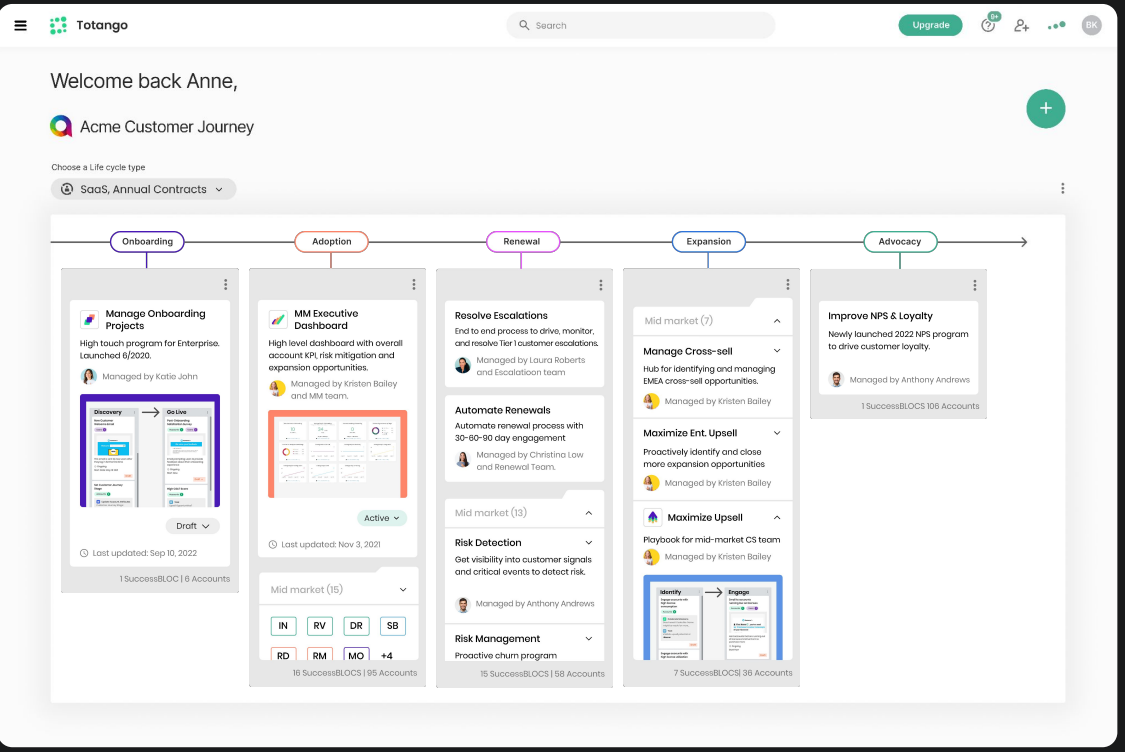


Improve NPS & Loyalty

Newly launched 2022 NPS program to drive customer loyalty.

Managed by Anthony Andrews

1 SuccessBLOCS 106 Accounts

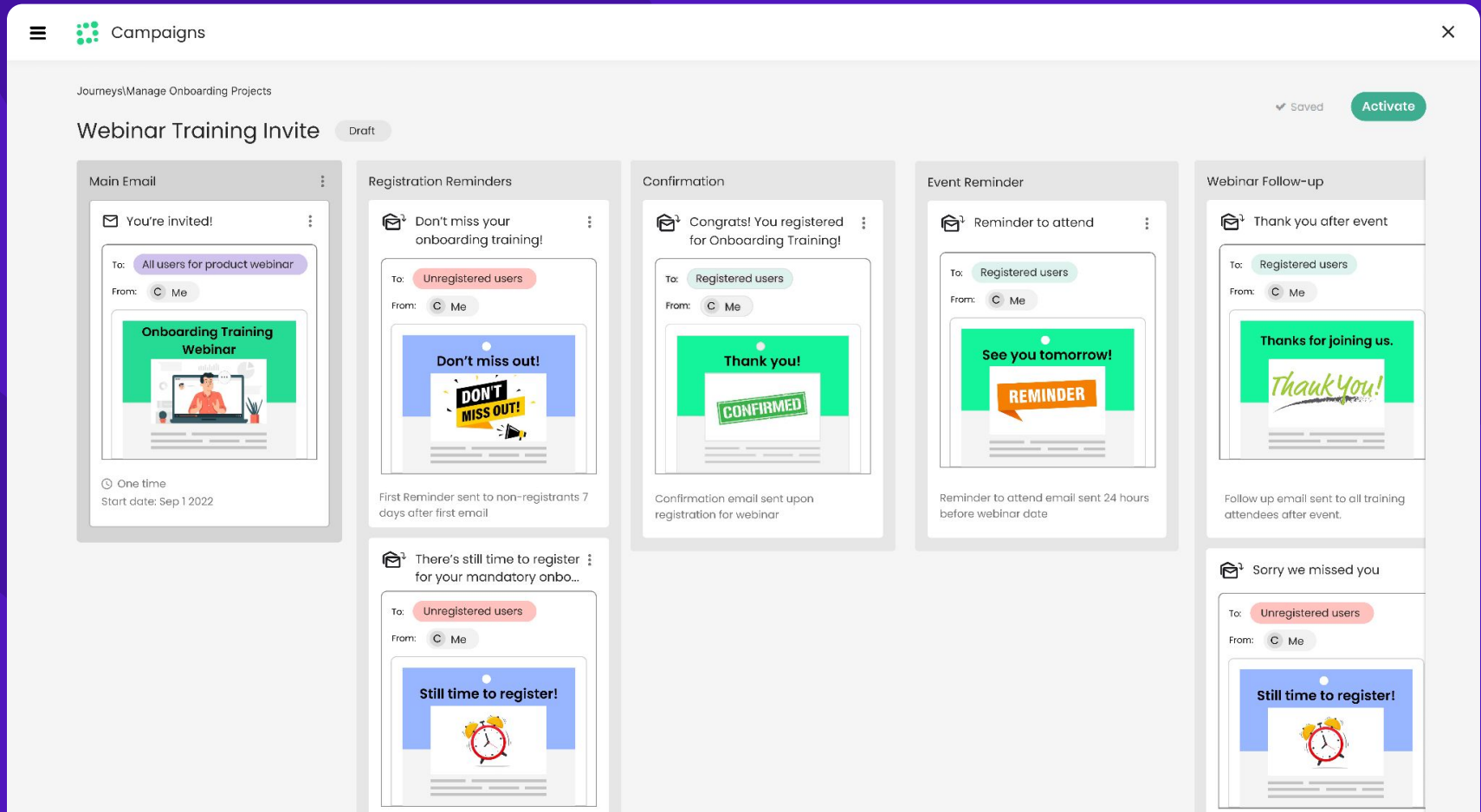


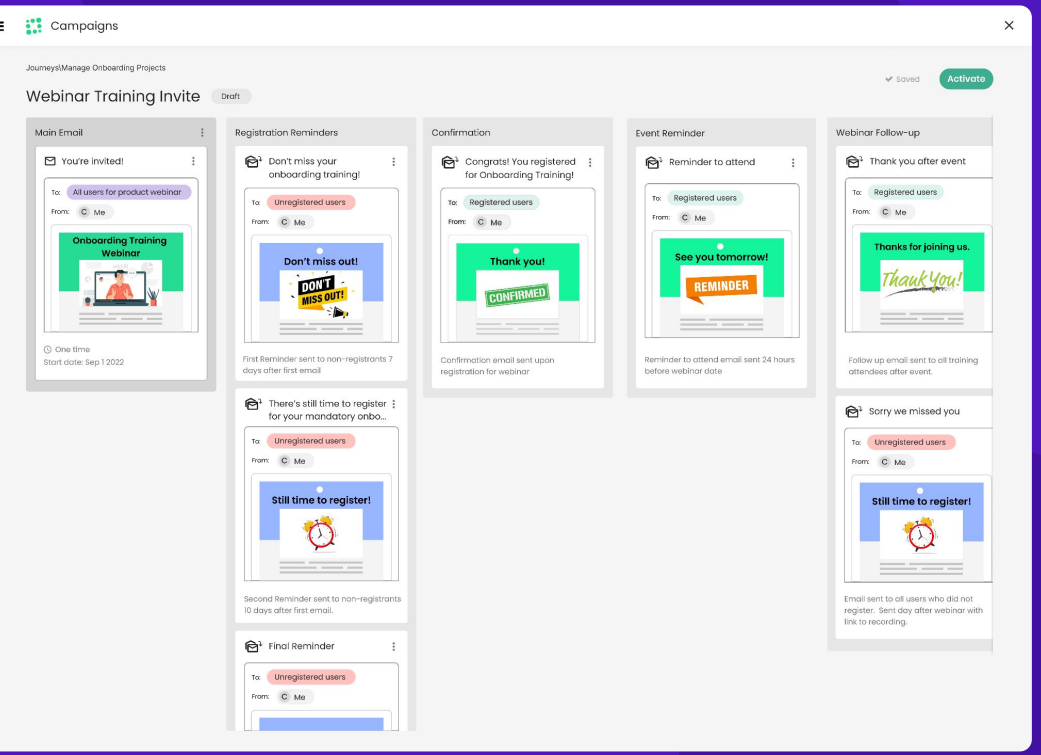
Customer Journey

Bringing together teams to plan, build, design, and run more inspiring customer journeys

Totango

Email flow


Campaigns
Journeys\Manage Onboarding Projects
Webinar Training Invite
Draft
Saved
Activate
Main Email
You're invited!
To: All users for product webinar
From: Me
Onboarding Training Webinar
One time
Start date: Sep 1 2022
Registration Reminders
Don't miss your onboarding training!
To: Unregistered users
From: Me
Don't miss out!
DON'T MISS OUT!
First Reminder sent to non-registrants 7 days after first email
There's still time to register for your mandatory onbo...
To: Unregistered users
From: Me
Still time to register!
Confirmation
Congrats! You registered for Onboarding Training!
To: Registered users
From: Me
Thank you!
CONFIRMED
Confirmation email sent upon registration for webinar
Event Reminder
Reminder to attend
To: Registered users
From: Me
See you tomorrow!
REMINDER
Reminder to attend email sent 24 hours before webinar date
Webinar Follow-up
Thank you after event
To: Registered users
From: Me
Thanks for joining us.
Thank You!
Follow up email sent to all training attendees after event.
Sorry we missed you
To: Unregistered users
From: Me
Still time to register!

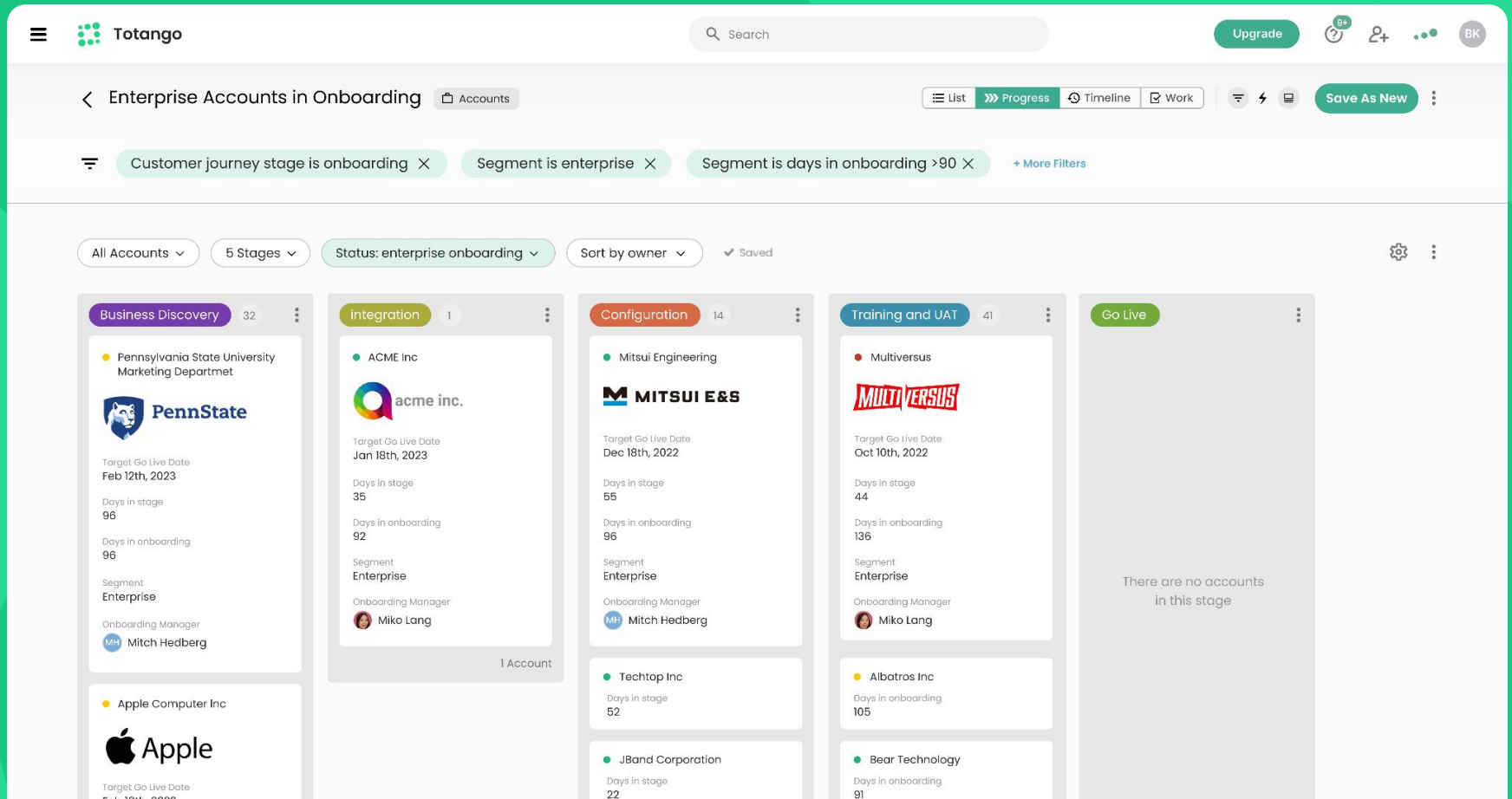


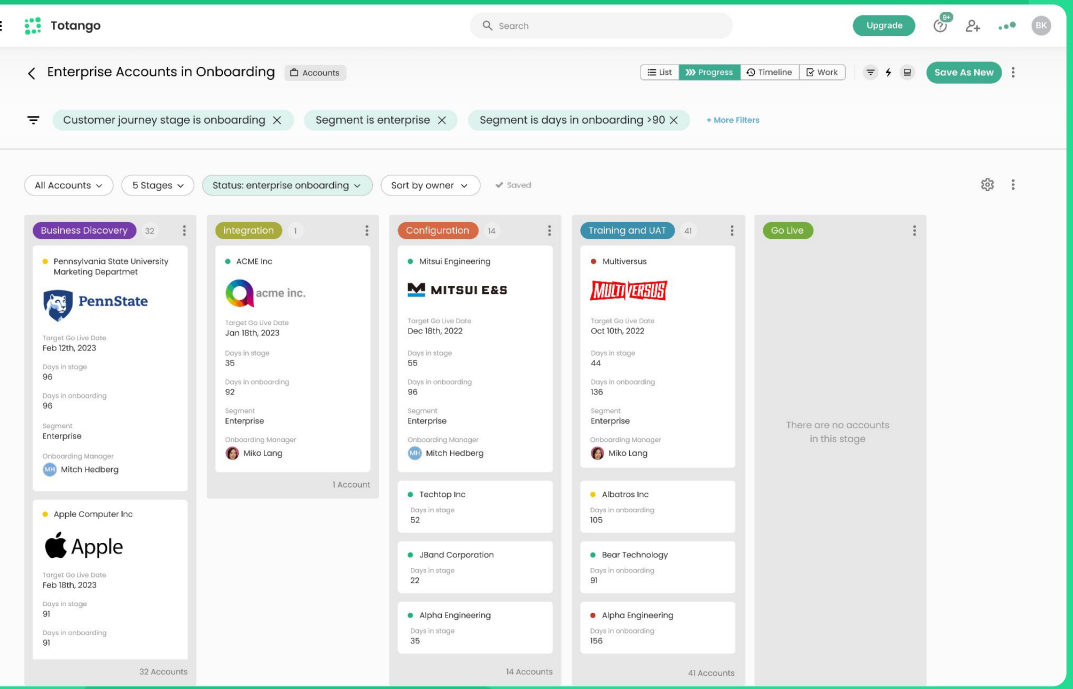
Email Flow

- → Manage the sequence of emails in one campaign
- → Visualize an entire email flow
- → Keep customers engaged visually and emotionally

Totango

Segment progress view





Segment Progress View

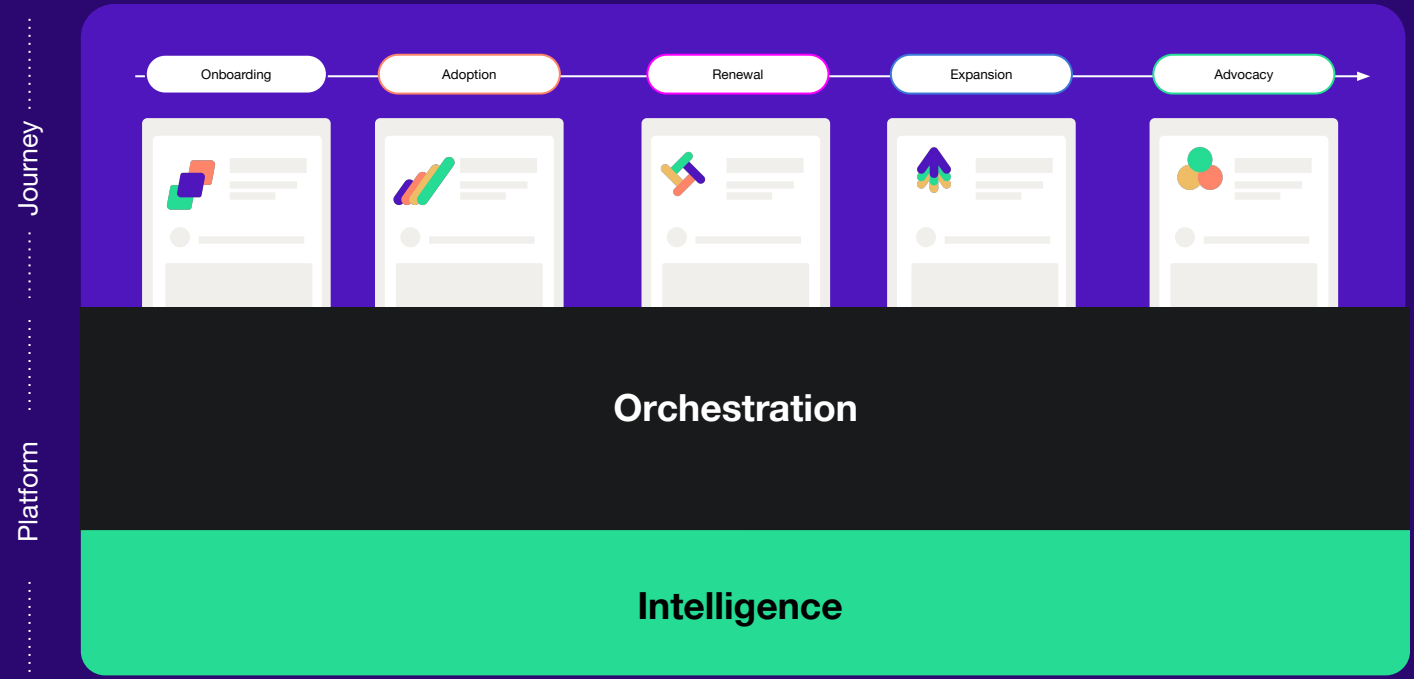
- → Visualize your entire book of business
- → Manage progress of customers
- → Instant spotlight on key attributes

We can’t wait to see
what you’ll come up with

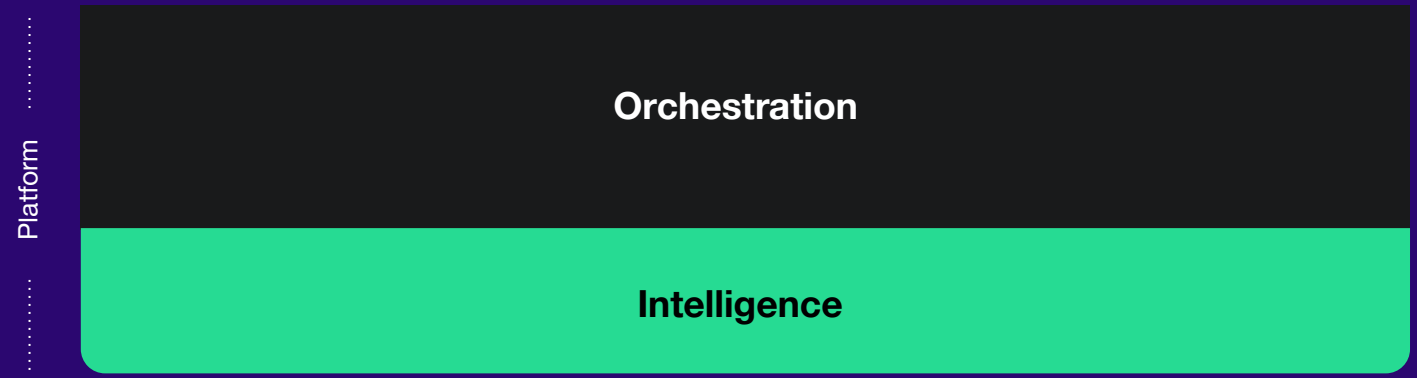
Back to Guy

Totango

Totango Composable Customer Success Platform



Win, as a team, with intelligent journeys

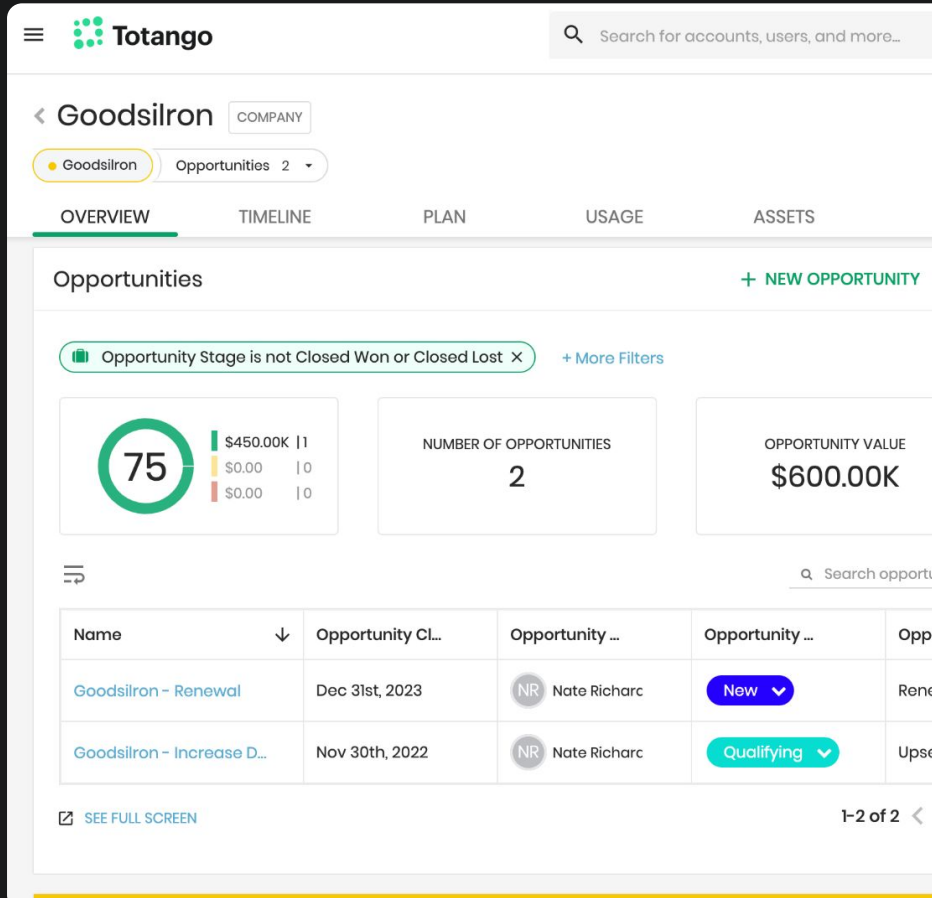


Shared, Open, Community, and Innovation

Embedded workflow across the company

Opportunity lifecycle management

- → Enable CS identify opportunities based on data
- → No more switching between systems
- → Easy recognition for CS attribution



Your data

+

Totango best practices and learnings

=

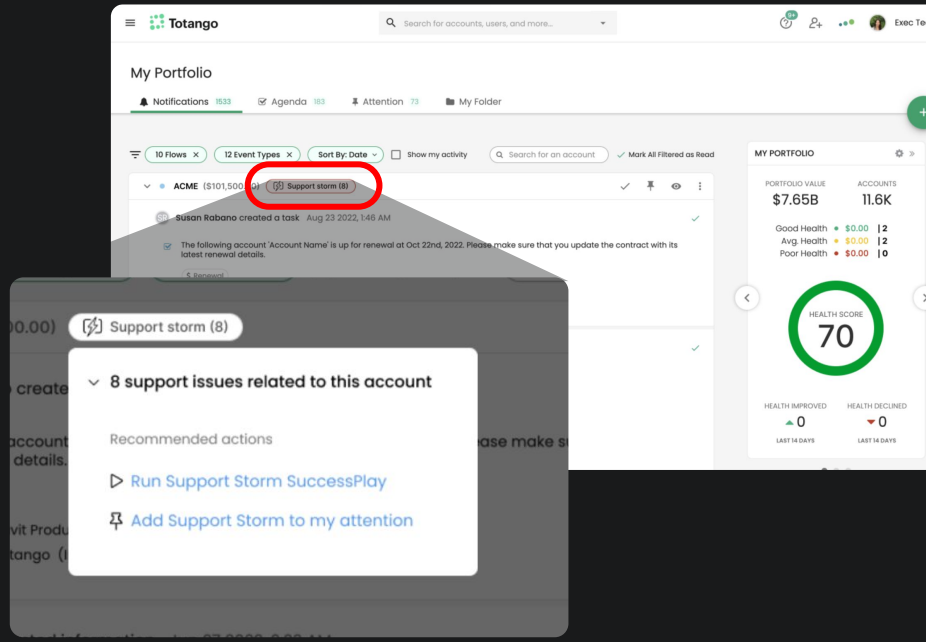
insights and recommendations

In flow recommendations

→ Identify a support storm

→ Identify neglected customers

→ Identify distracted CSM



Proprietary and Confidential

Community

You are all creators

Build skills.
Earn badges.
Unlock new ideas.

Totango
Creator Campus

180
Accounts

320 Individuals

450
Badges Issued

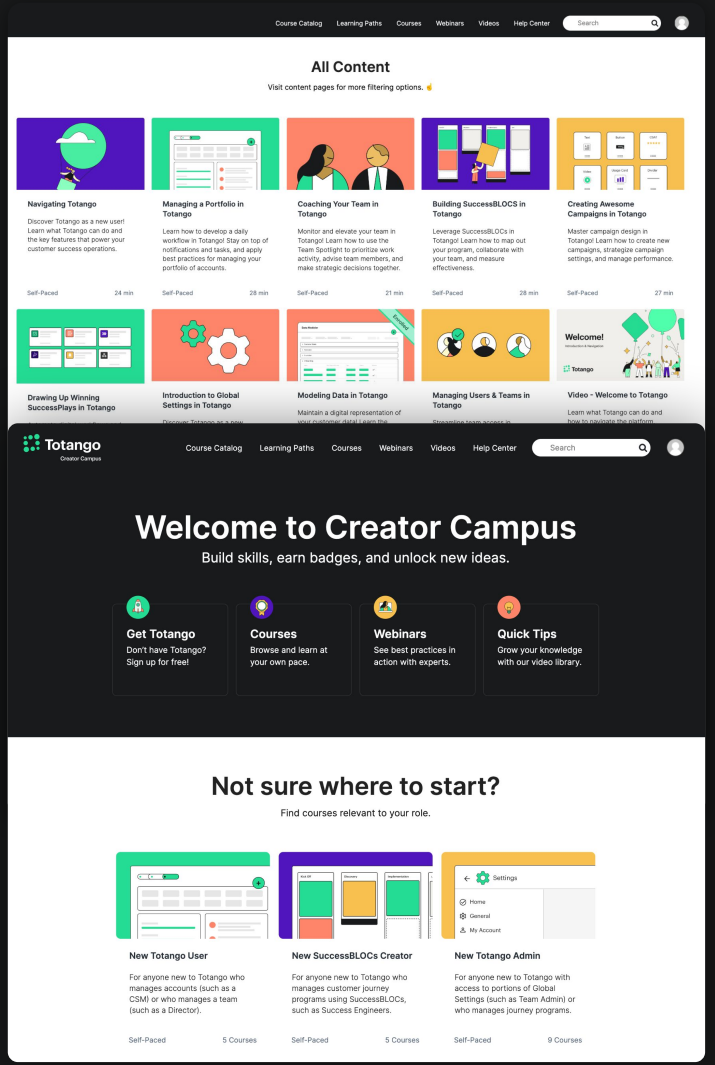
760 Course Enrollments

100%
Course CSAT

11 Self-Paced Courses

60%
Course Completion

25 Min Avg. Session Time



Your asks are part of our plans

→ Easily submit your wishlist requests and browse through requests submitted by other Totango users.

→ Easier workflow to ensure we get your feedback and address it.

42
Wishlist items released

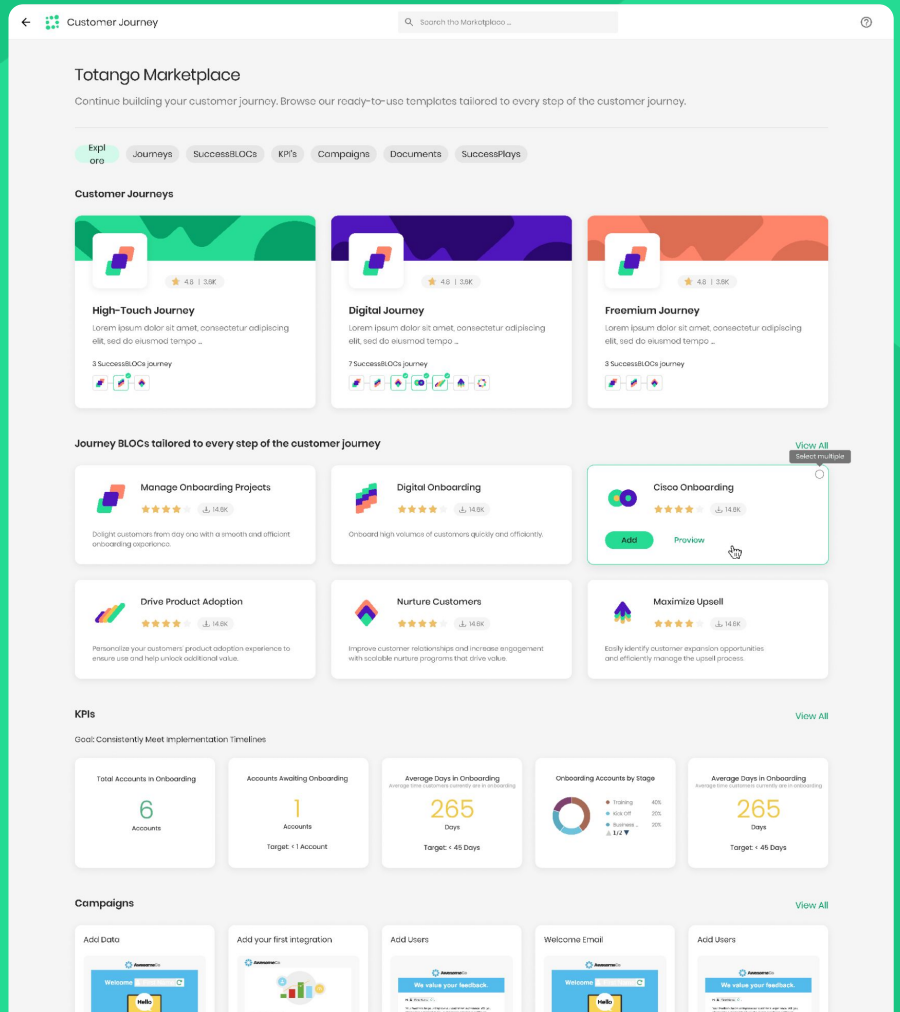
65
New items submitted

6
Wishlist items moved to planned

Totango

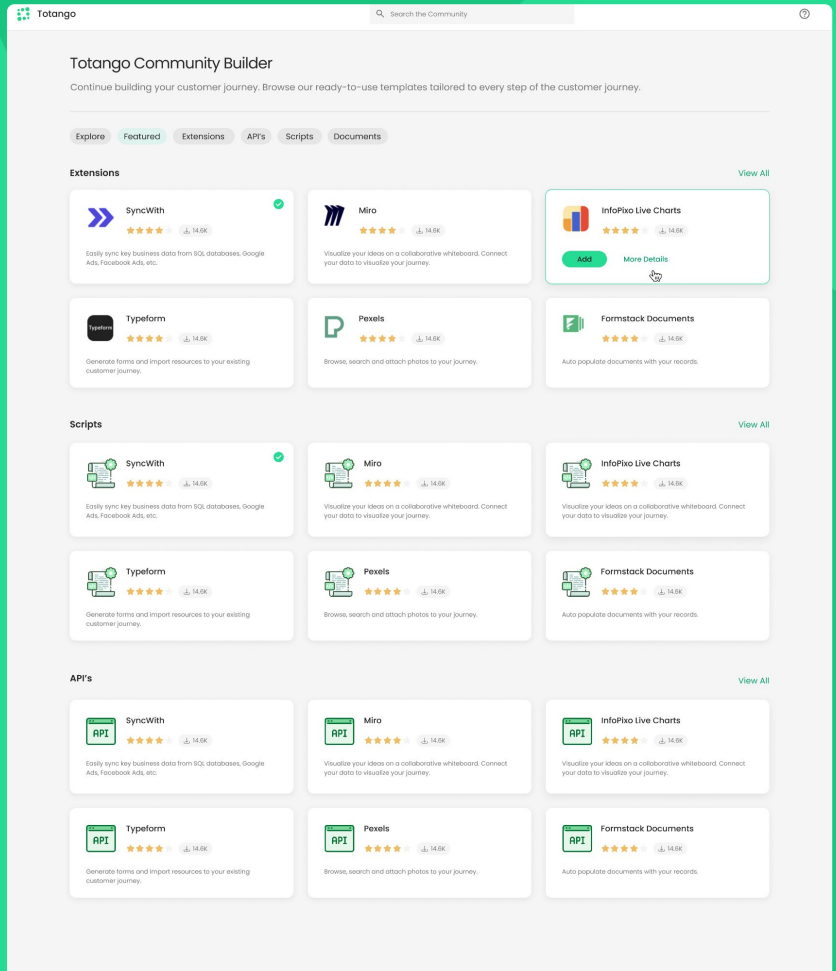
Marketplace and community

- → Star ratings
- → Popularity counters
- → Discussion threads
- → Community publishing

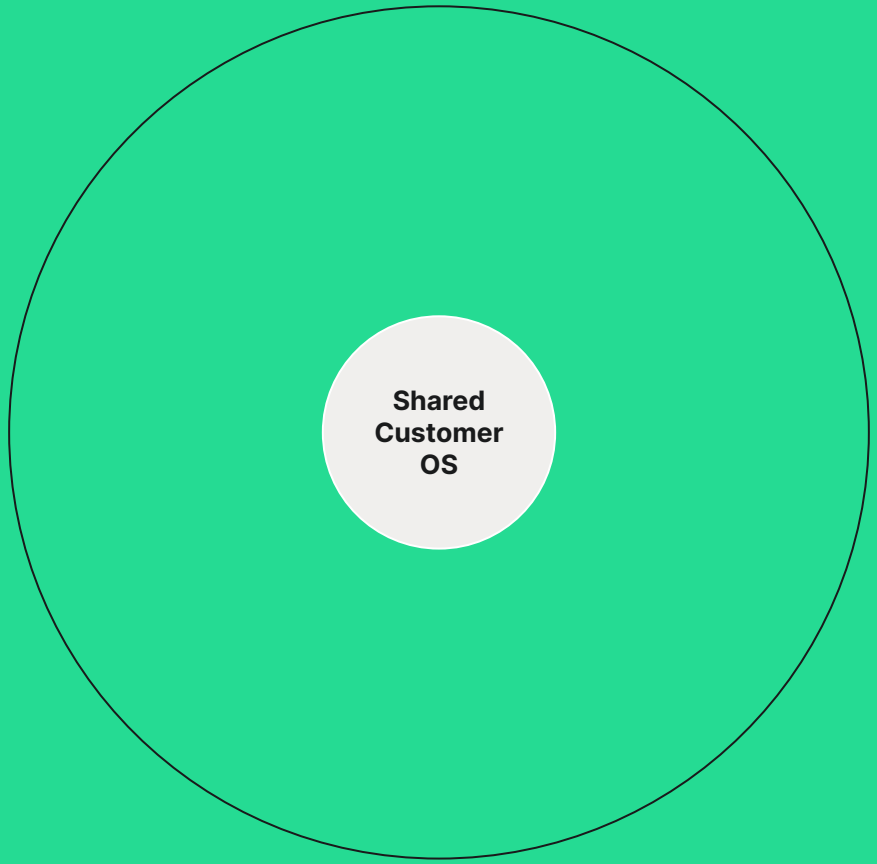


Marketplace and creators

- → Unlock assets that wuthering successbloc
- → Enabling you to share feedback
- → Contribute your best practices



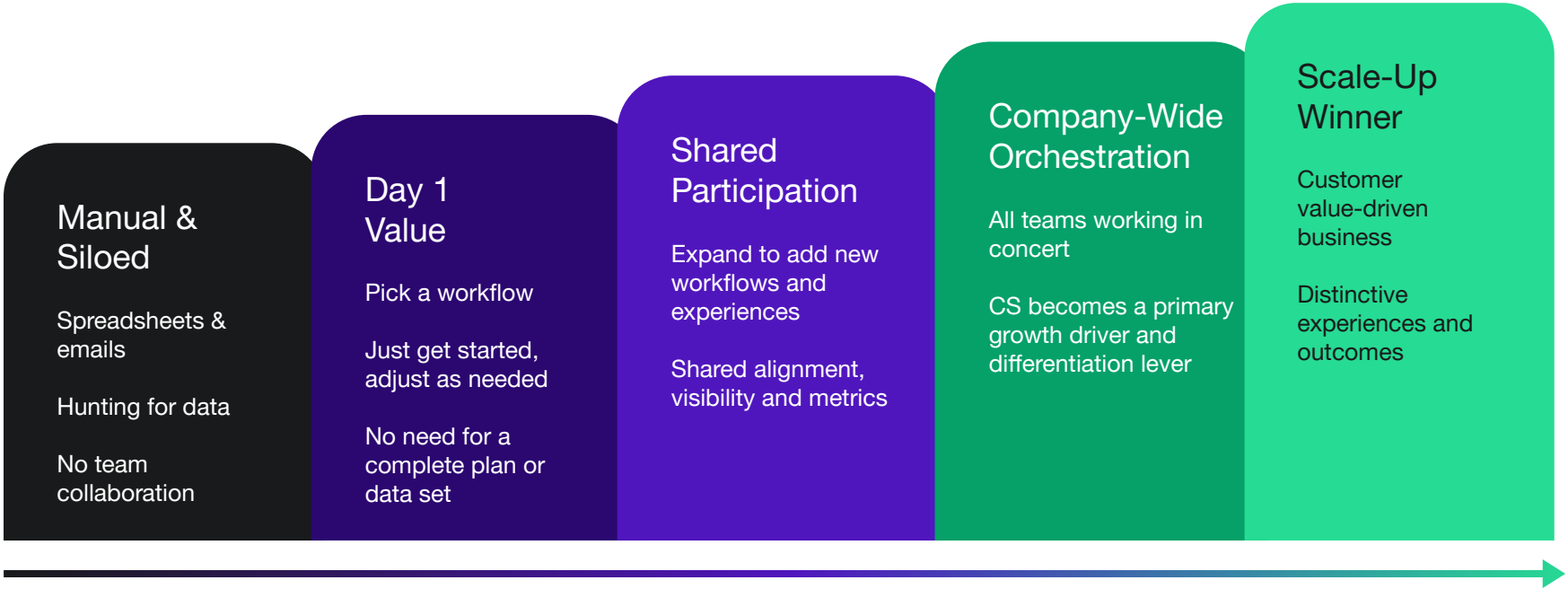
Open Totango to Partner



Back to Guy

Totango

Start where you are and go



Composable CS Maturity Model

Thank you

totango.com