



# Value *Acceleration*

The Future of Customer Success is *Composable*





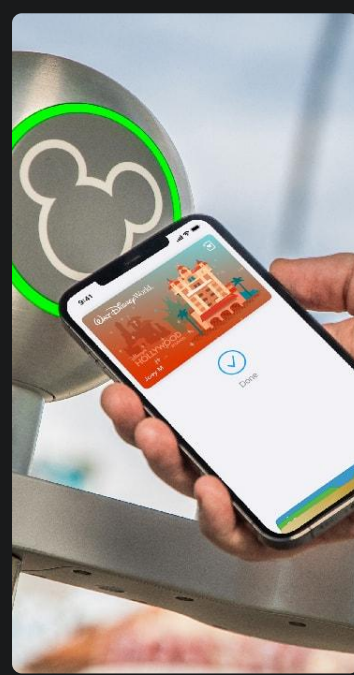
**Welcome to Miami!**





**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**

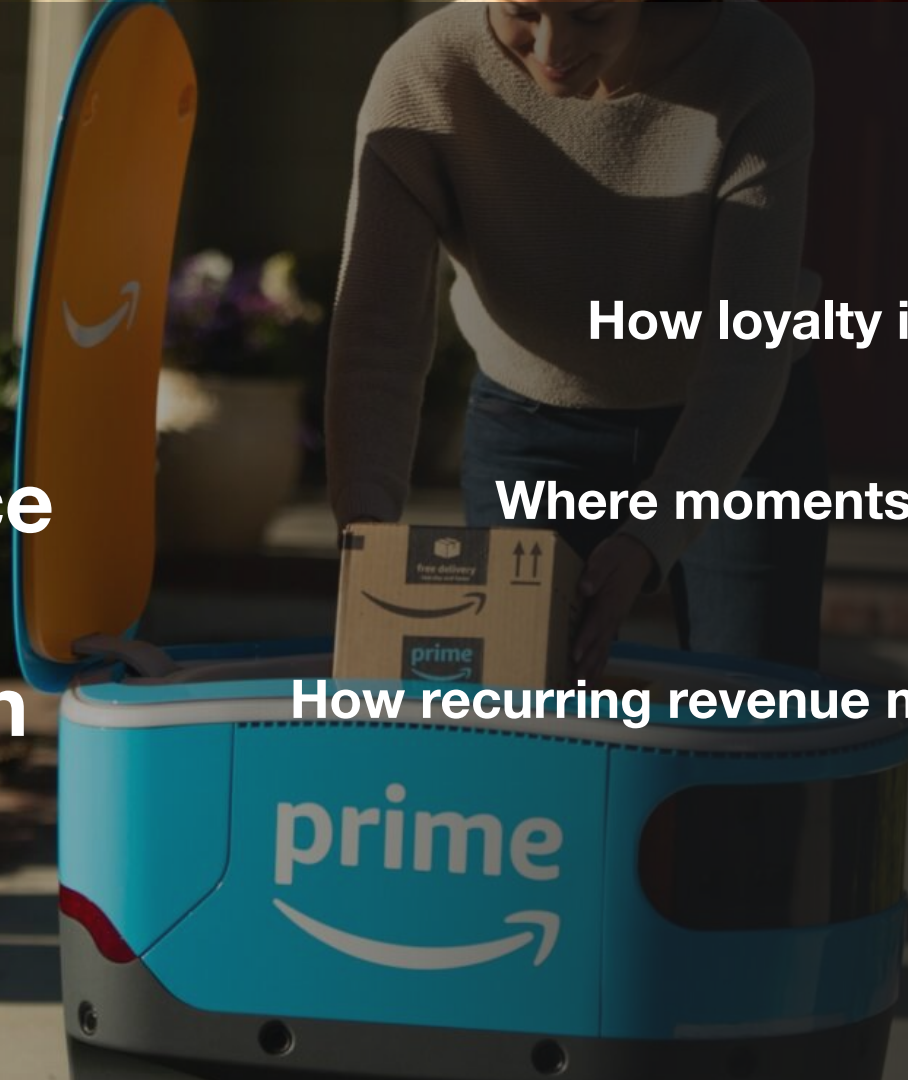


**Customer  
success is the  
central life force  
of recurring  
revenue growth**

**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

TESLA

Model S

Model 3

Model X

Model Y

Solar Roof

Solar Panels

Shop

Account

Menu

## Model 3

Order Online for [Touchless Delivery](#)

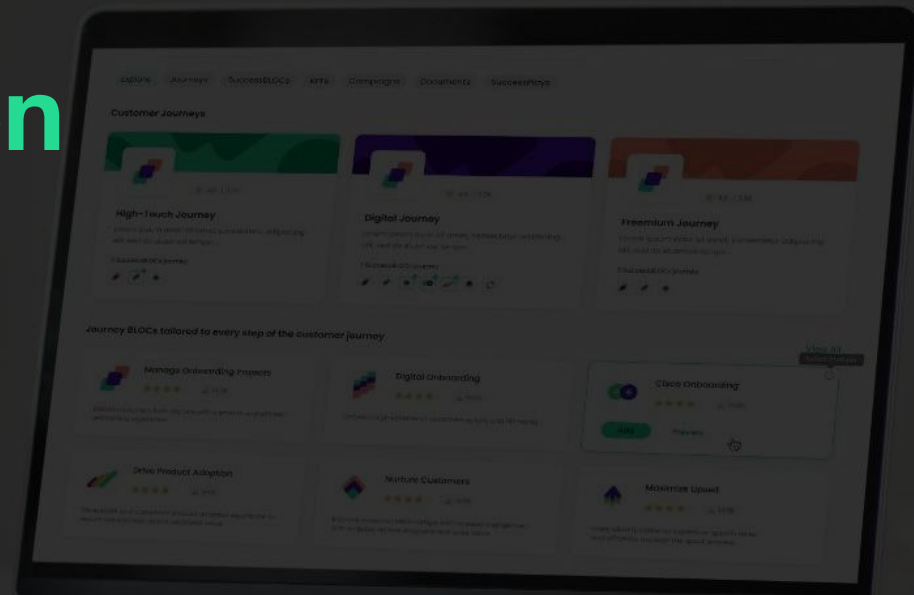


CUSTOM ORDER

EXISTING INVENTORY

# Value-driven customer journey

Remove Friction to Value



Digital First

Self Service

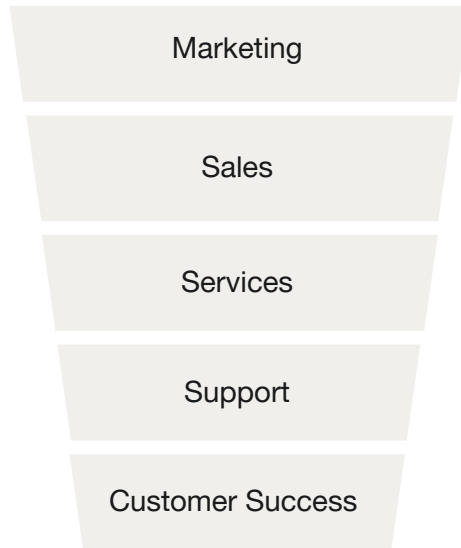
Product Led



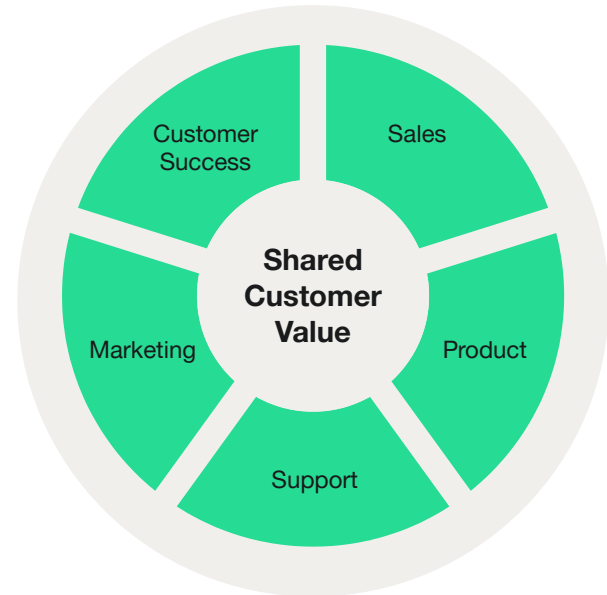
# The value-driven journey is **shared**

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

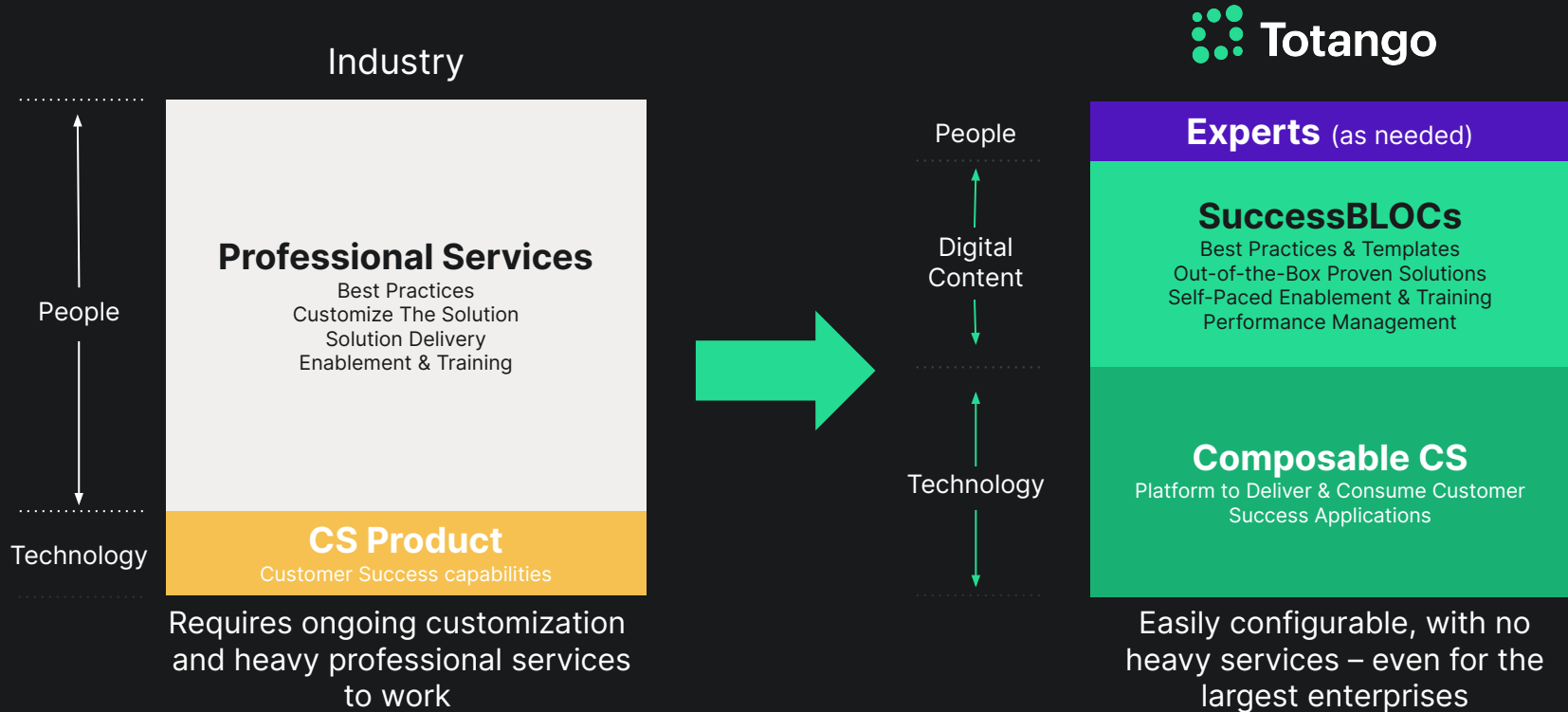
By our customers

Predictable Scale-Up

Continuous Recalibration

Day 1 Value

# 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

#### Discovery

New Customer Welcome Email

Users 1



This email is sent to new users after they log in for the first time

Ongoing  
Start Date: May 18 2020

Set Customer Journey Stage

Accounts 2

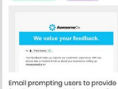


#### Go Live

Post-Onboarding Satisfaction Survey

Accounts 0

Users 1



Email prompting users to provide feedback about their onboarding experience

Ongoing  
Start Now

High CSAT Score

Accounts 2

### 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

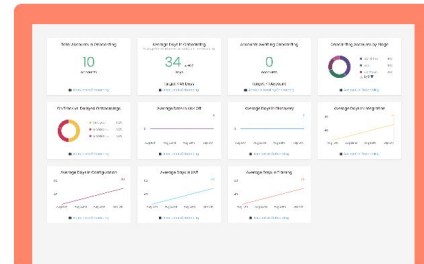


### MM Executive Dashboard

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



Managed and Esc

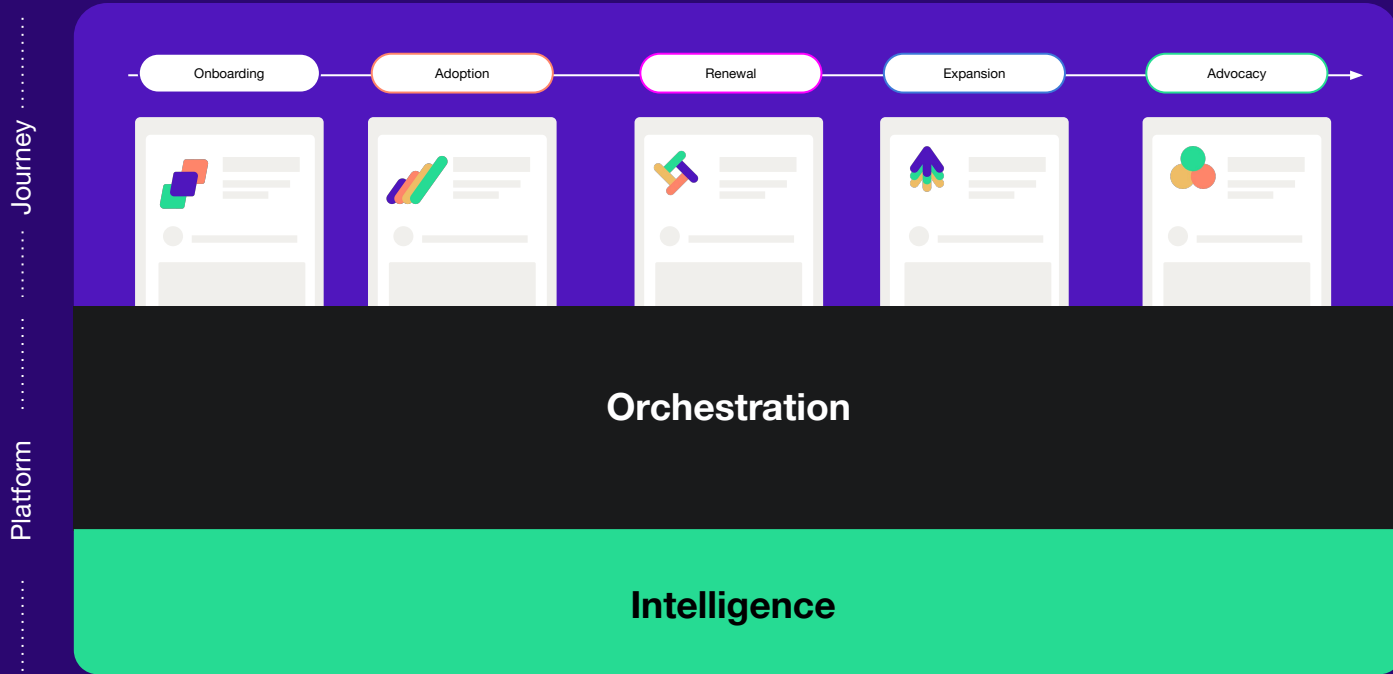
### Automate R

Automate ren 30-60-90 day



Managed and Ren

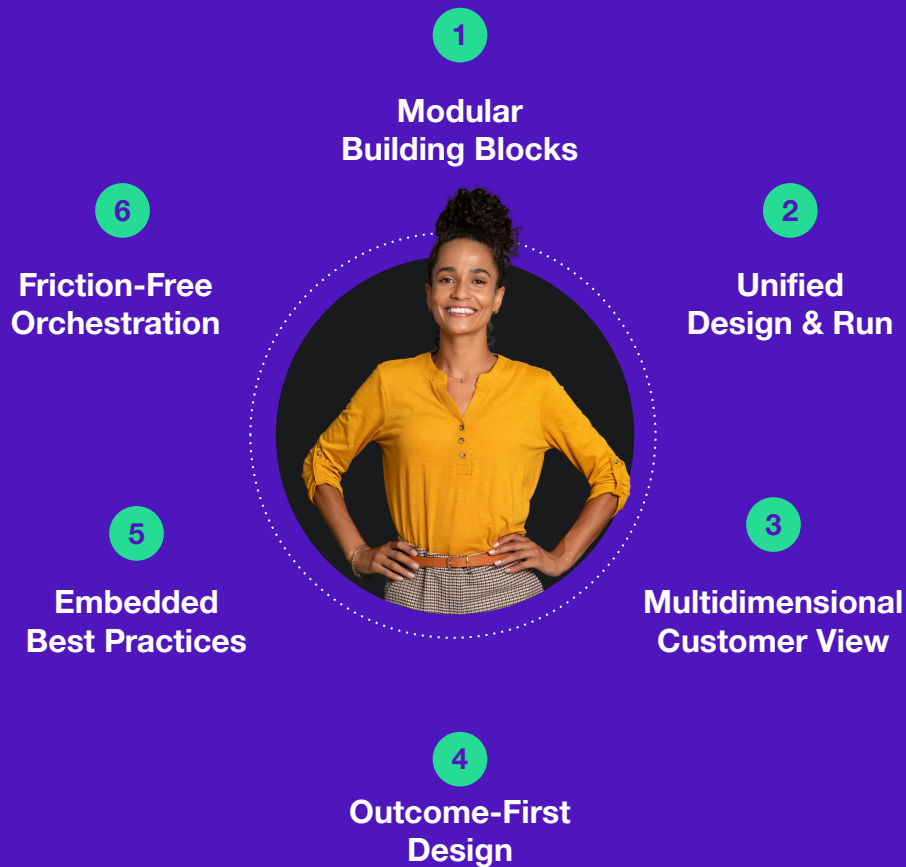
# Totango Composable Customer Success Platform





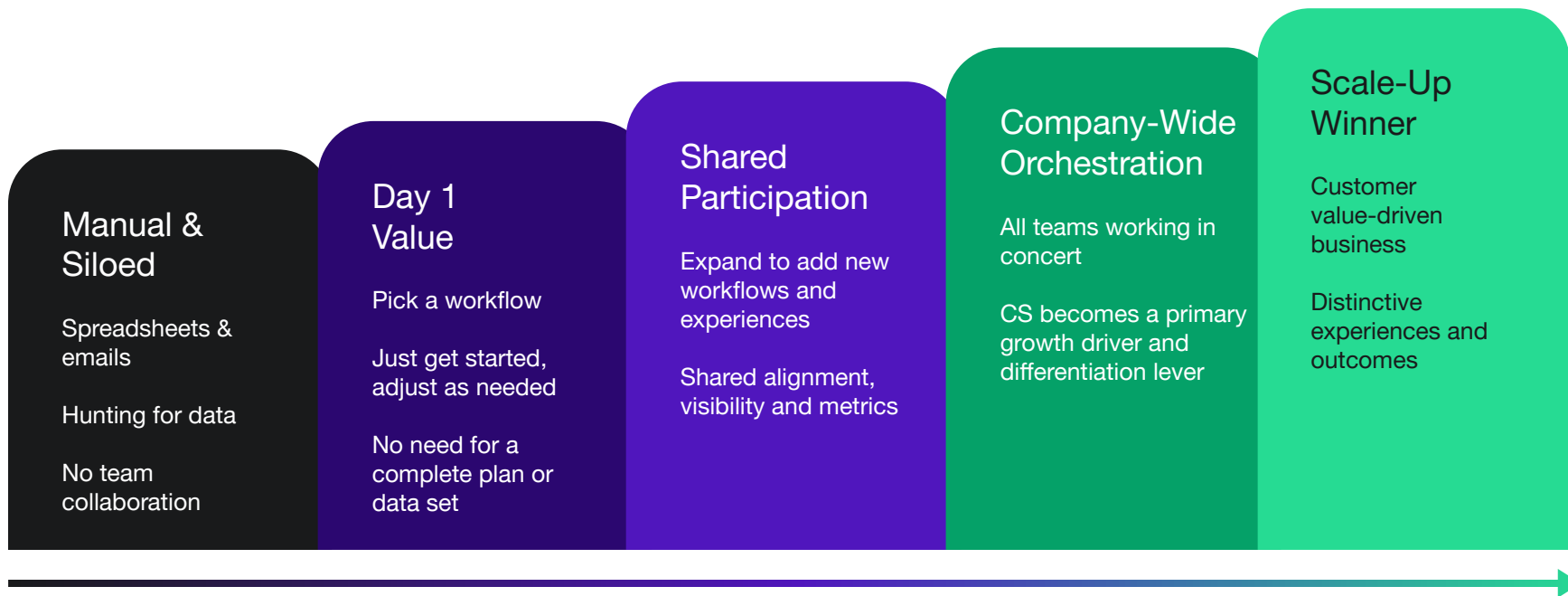
# Composable Customer Success

Outcome First  
Modular  
Embedded Intelligence



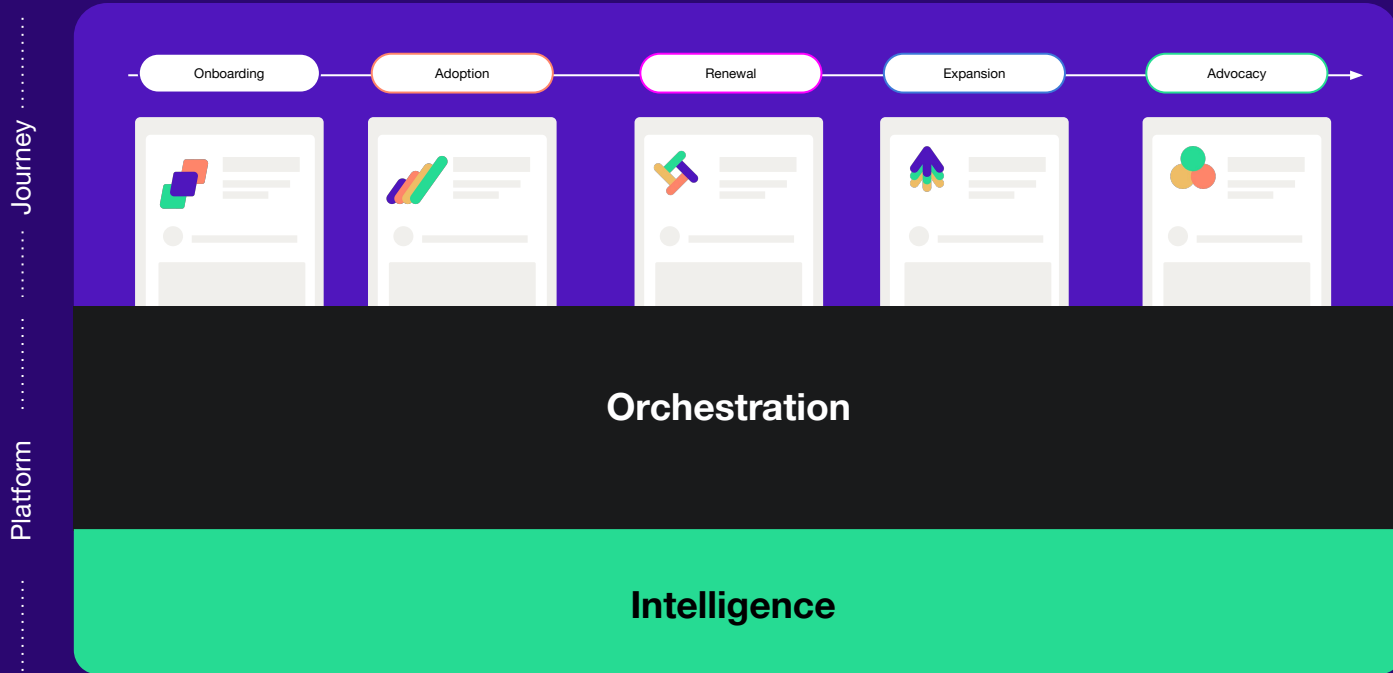


# Start where you are and go



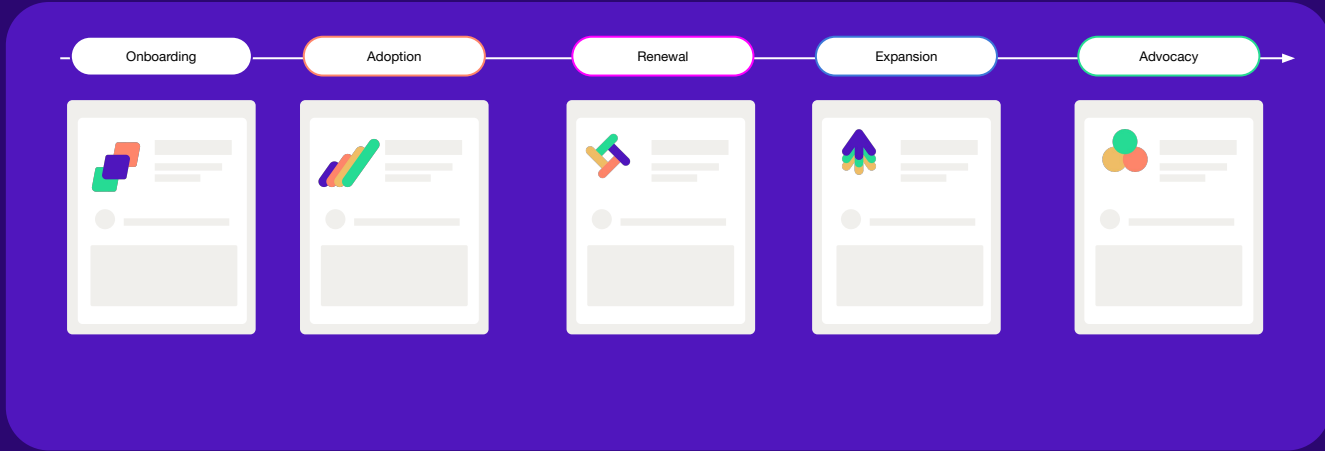
## Composable CS Maturity Model

# Totango Composable Customer Success Platform



# So, you can win with impactful journeys

Journey



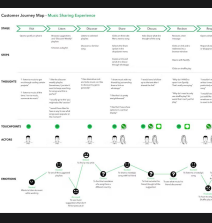
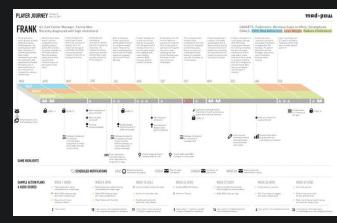
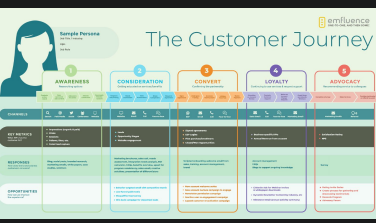
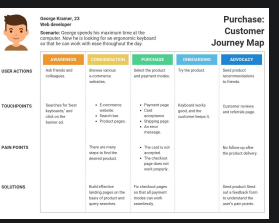
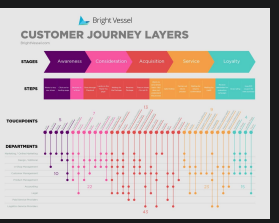
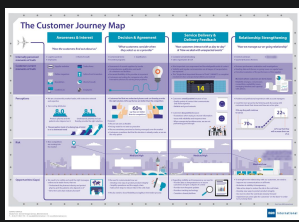
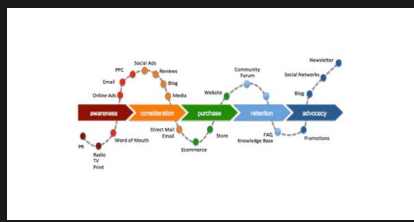
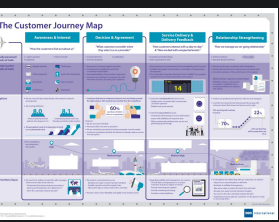
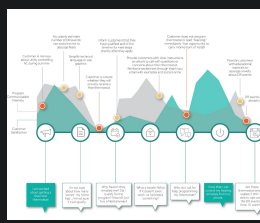
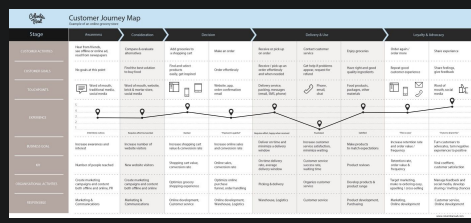
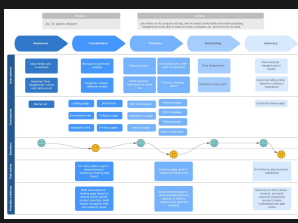
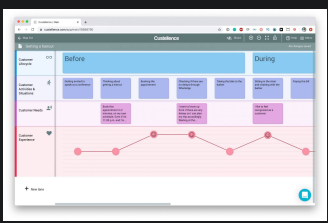
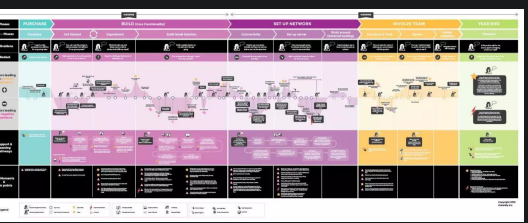
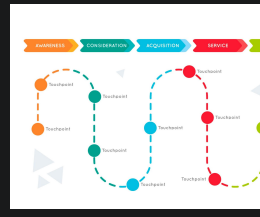
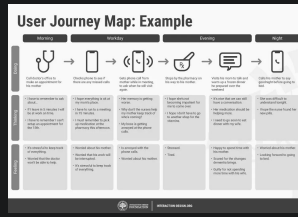
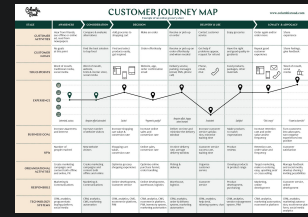
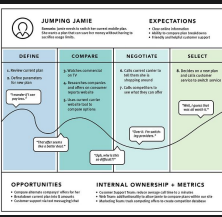


These learnings inspired us to innovate...

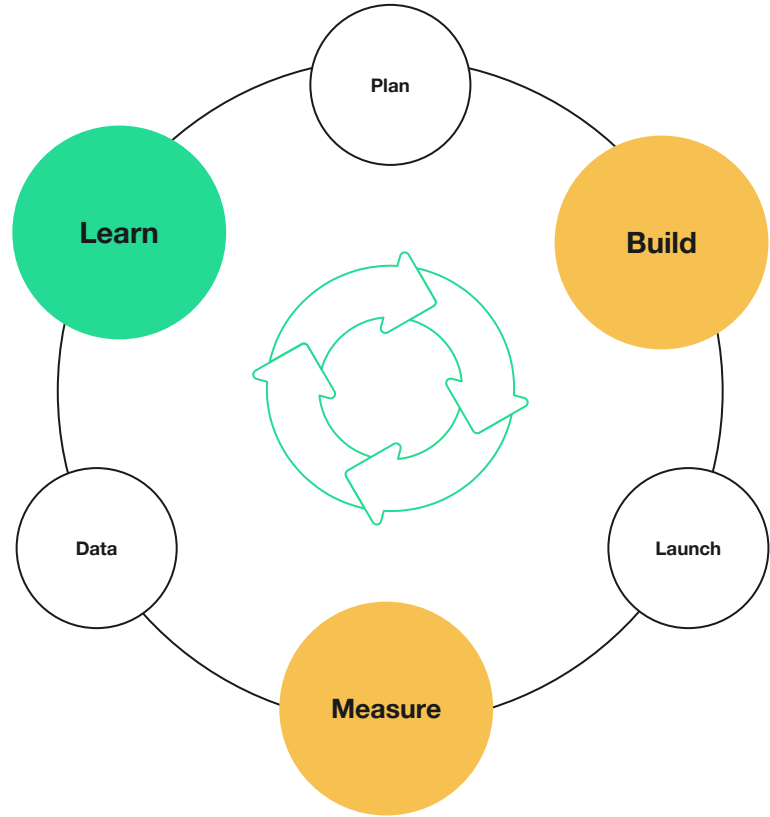
**New design paradigm that you'll love!**

**Your customer journey  
is the product**





**In order to  
move fast,  
you need to  
cycle through**



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**<sup>CAMPAIGNS</sup> **6x**<sup>SUCCESSPLAYS</sup>

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

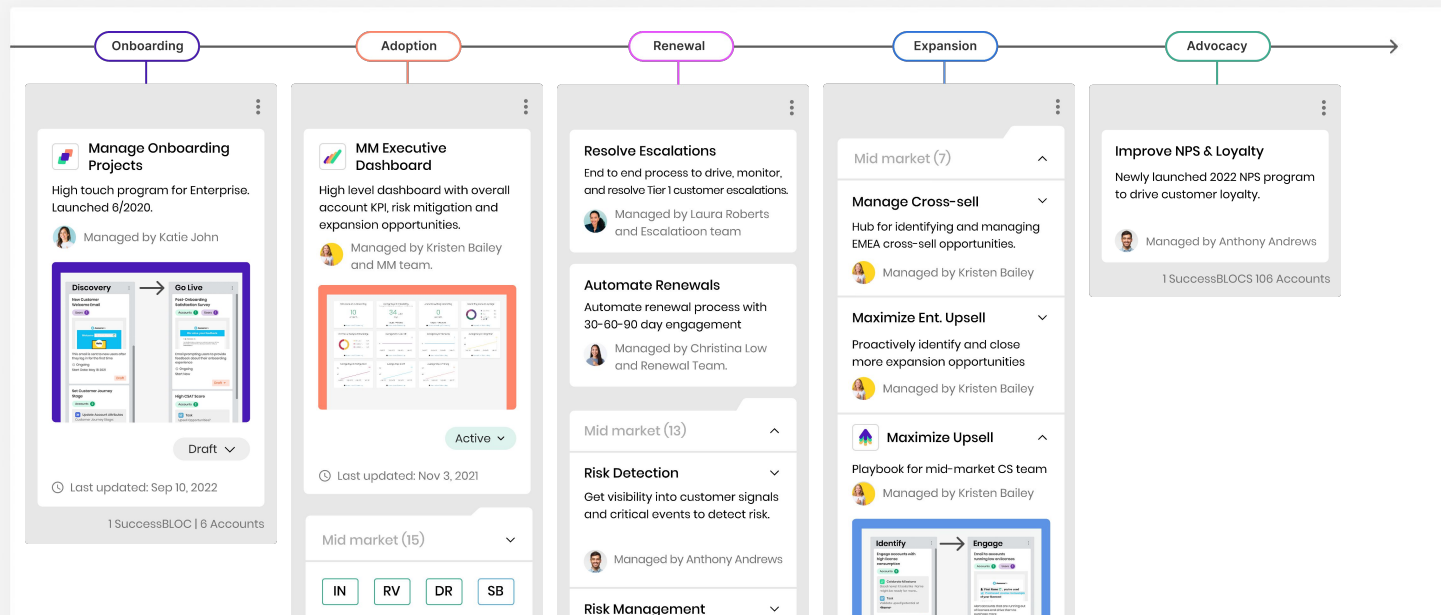
# Customer journey


Welcome back Anne,

## Acme Customer Journey

Choose a Life cycle type


SaaS, Annual Contracts





 Upgrade 10

Welcome back Anne,


+

Choose a Life cycle type

SaaS, Annual Contracts ▾

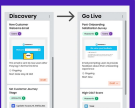
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Onboarding

**Manage Onboarding Projects**

High touch program for Enterprise. Launched 6/2020.

Managed by Katie John




1 SuccessBLOC | 6 Accounts

Adoption

**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

RD RM MO +4

16 SuccessBLOCs | 95 Accounts

Renewal

**Resolve Escalations**

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

Managed by Laura Roberts and Escalation team

**Automate Renewals**

Automate renewal process with 30-60-90 day engagement

Managed by Christine Law 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**

Proactive churn program

15 SuccessBLOCs | 58 Accounts

Expansion

Mid market (7)

**Manage Cross-sell**

Hub for identifying and managing BMEA cross-sell opportunities.

Managed by Kristen Bailey

**Maximize Ent. Upsell**

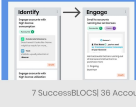
Proactively identify and close more expansion opportunities

Managed by Kristen Bailey

**Maximize Upsell**

Playbook for mid-market CS team

Managed by Kristen Bailey



7 SuccessBLOCs | 38 Accounts

Advocacy

**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

# Email flow

☰ Campaigns



Journeys/Manage Onboarding Projects

✓ Saved

Activate

## Webinar Training Invite

Draft

### Main Email

✉ You're invited!

To: All users for product webinar

From: Me



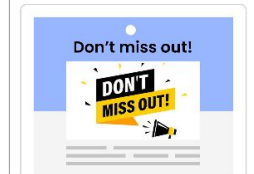
🕒 One time  
Start date: Sep 1 2022

### Registration Reminders

✉ Don't miss your onboarding training!

To: Unregistered users

From: Me



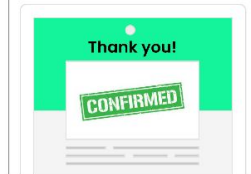
First Reminder sent to non-registrants 7 days after first email

### Confirmation

✉ Congrats! You registered for Onboarding Training!

To: Registered users

From: Me



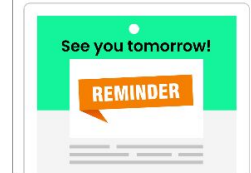
Confirmation email sent upon registration for webinar

### Event Reminder

✉ Reminder to attend

To: Registered users

From: Me



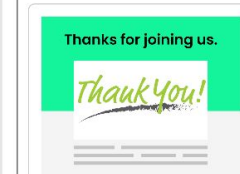
Reminder to attend email sent 24 hours before webinar date

### Webinar Follow-up

✉ Thank you after event

To: Registered users

From: Me

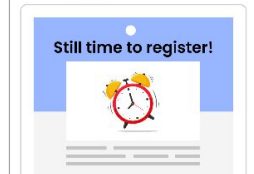


Follow up email sent to all training attendees after event.

✉ There's still time to register for your mandatory onbo...

To: Unregistered users

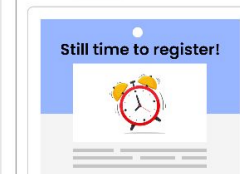
From: Me



✉ Sorry we missed you

To: Unregistered users

From: Me





Campaigns

JourneysManage Onboarding Projects

### Webinar Training Invite


Draft ✓ Saved Activate

**Main Email**

You're invited!

To: All users for product webinar

From: Me



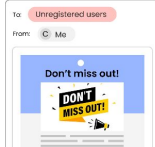
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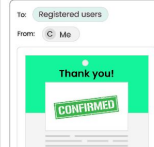
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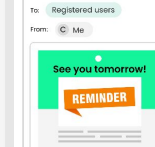
Confirmation email sent upon registration for webinar

**Event Reminder**

Reminder to attend

To: Registered users

From: Me



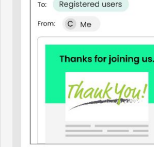
Reminder to attend email sent 24 hours before webinar date

**Webinar Follow-up**

Thank you after event

To: Registered users

From: Me



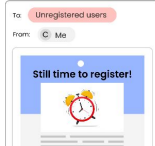
Follow up email sent to all training attendees after event.

**Registration Reminders (continued)**

There's still time to register for your mandatory onbo...

To: Unregistered users

From: Me




Second Reminder sent to non-registrants 10 days after first email.

**Final Reminder**

To: Unregistered users

From: Me



Email sent to all users who did not register. Sent day after webinar with link to recording.

# Email Flow

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

# Segment progress view

**Totango**  Upgrade B+ + ... BK

**Enterprise Accounts in Onboarding** Accounts List Progress Timeline Work Save As New

Customer journey stage is onboarding Segment is enterprise Segment is days in onboarding >90 + More Filters

All Accounts 5 Stages Status: enterprise onboarding Sort by owner Saved Settings

**Business Discovery** 32

- PennState**  
Target Go Live Date: Feb 12th, 2023  
Days in stage: 96  
Days in onboarding: 96  
Segment: Enterprise  
Onboarding Manager: Mitch Hedberg
- Apple Computer Inc**  
Target Go Live Date: Feb 12th, 2023

**integration** 1

- acme inc.**  
Target Go Live Date: Jan 18th, 2023  
Days in stage: 35  
Days in onboarding: 92  
Segment: Enterprise  
Onboarding Manager: Miko Lang

1 Account

**Configuration** 14

- Mitsui Engineering**  
Target Go Live Date: Dec 18th, 2022  
Days in stage: 55  
Days in onboarding: 96  
Segment: Enterprise  
Onboarding Manager: Mitch Hedberg
- Techtop Inc**  
Days in stage: 52
- JBand Corporation**  
Days in stage: 22

**Training and UAT** 41

- Multiversus**  
Target Go Live Date: Oct 10th, 2022  
Days in stage: 44  
Days in onboarding: 136  
Segment: Enterprise  
Onboarding Manager: Miko Lang
- Albatros Inc**  
Days in onboarding: 105
- Bear Technology**  
Days in onboarding: 91

**Go Live**

There are no accounts in this stage

Totango

Enterprise Accounts in Onboarding

Customer journey stage is onboarding X Segment is enterprise X Segment is days in onboarding >90 X

All Accounts 5 Stages Status: enterprise onboarding Sort by owner Saved

Stage	Account Name	Target Go Live Date	Days in stage	Days in onboarding	Segment	Onboarding Manager
Business Discovery	Pennsylvania State University Marketing Department	Feb 12th, 2023	96	96	Enterprise	Mitch Hedberg
	Apple Computer Inc	Feb 18th, 2023	91	91	Enterprise	
Integration	ACME Inc	Jan 18th, 2023	35	92	Enterprise	Miko Lang
Configuration	Mitsui Engineering	Dec 18th, 2022	55	98	Enterprise	Mitch Hedberg
	Techtop Inc		52			
	JBand Corporation		22			
	Alpha Engineering		35			
Training and UAT	Multiversus	Oct 10th, 2022	44	136	Enterprise	Miko Lang
	Albatros Inc		105			
Go Live	Bear Technology		81			
	Alpha Engineering		156			

# Segment Progress View

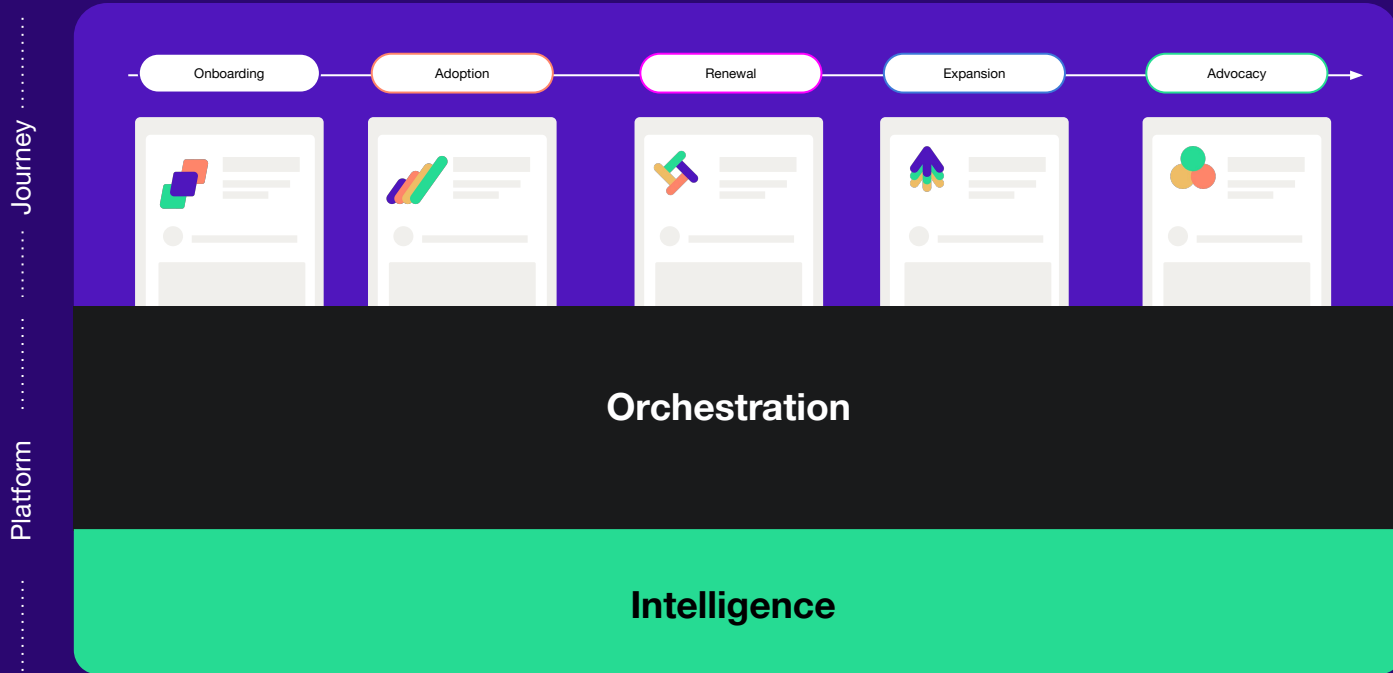
- Visualize your entire book of business
- Manage progress of customers
- Instant spotlight on key attributes

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

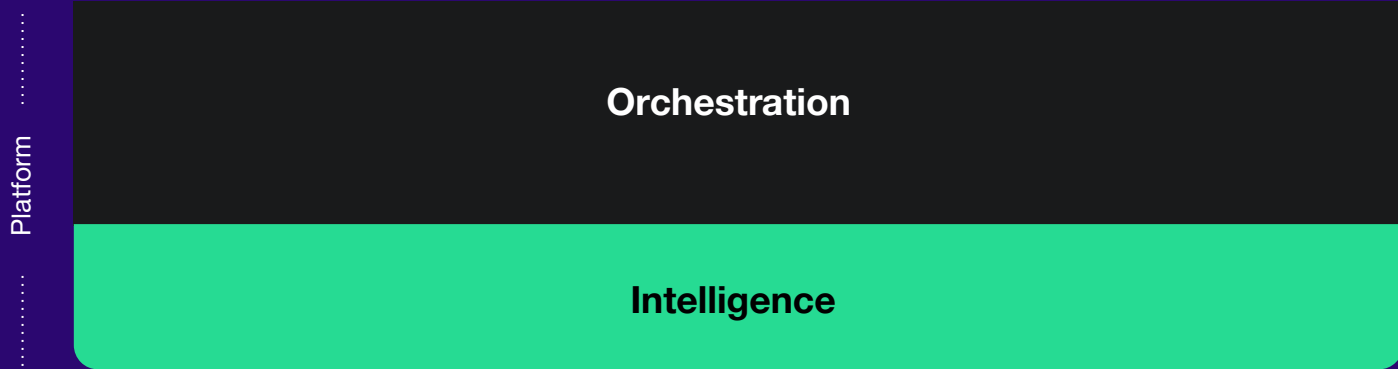


# Back to Guy

# Totango Composable Customer Success Platform

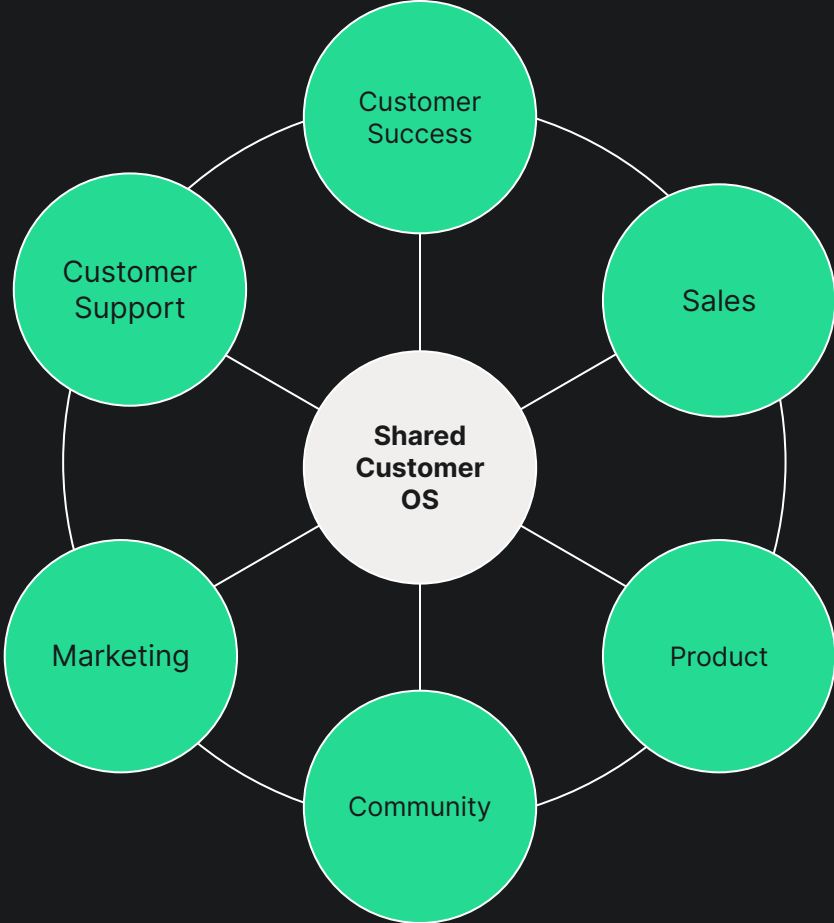


# Win, as a **team**, with intelligent journeys



# 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

The screenshot displays the Totango CRM interface for managing opportunities. At the top, the Totango logo and a search bar are visible. The main header shows the company name 'Goodsilron' and a 'COMPANY' dropdown. Below this, there are tabs for 'OVERVIEW', 'TIMELINE', 'PLAN', 'USAGE', and 'ASSETS', with 'OVERVIEW' selected. The main content area is titled 'Opportunities' and includes a '+ NEW OPPORTUNITY' button. A filter bar indicates 'Opportunity Stage is not Closed Won or Closed Lost' with a '+ More Filters' link. Three summary cards are shown: a circular gauge for '75' with a bar chart for '\$450.00K | 1', '\$0.00 | 0', and '\$0.00 | 0'; a card for 'NUMBER OF OPPORTUNITIES' with the value '2'; and a card for 'OPPORTUNITY VALUE' with the value '\$600.00K'. Below the cards is a table with columns for Name, Opportunity Cl..., Opportunity ..., Opportunity ..., and Opp... The table contains two rows: 'Goodsilron - Renewal' with a date of 'Dec 31st, 2023' and a 'New' status, and 'Goodsilron - Increase D...' with a date of 'Nov 30th, 2022' and a 'Qualifying' status. At the bottom, there is a 'SEE FULL SCREEN' link and a page indicator '1-2 of 2'.

Totango

Search for accounts, users, and more...

< Goodsilron COMPANY

Goodsilron Opportunities 2

OVERVIEW TIMELINE PLAN USAGE ASSETS

Opportunities + NEW OPPORTUNITY

Opportunity Stage is not Closed Won or Closed Lost + More Filters

75 \$450.00K | 1  
\$0.00 | 0  
\$0.00 | 0

NUMBER OF OPPORTUNITIES  
2

OPPORTUNITY VALUE  
\$600.00K

Search opportu...

Name	Opportunity Cl...	Opportunity ...	Opportunity ...	Opp...
Goodsilron - Renewal	Dec 31st, 2023	NR Nate Richarc	New	Ren...
Goodsilron - Increase D...	Nov 30th, 2022	NR Nate Richarc	Qualifying	Upse...

SEE FULL SCREEN

1-2 of 2

**Your data**

**+**

**Totango best practices and learnings**

**=**

**insights and recommendations**

# In flow recommendations

- Identify a support storm
- Identify neglected customers
- Identify distracted CSM

The screenshot displays the Totango 'My Portfolio' dashboard. At the top, there are navigation tabs for 'Notifications 1533', 'Agenda 183', 'Attention 73', and 'My Folder'. Below these, a filter bar shows '10 Flows', '12 Event Types', and 'Sort By: Date'. A red circle highlights a 'Support storm (8)' notification. A modal window is open over this notification, showing a list of '8 support issues related to this account'. Under the heading 'Recommended actions', there are two options: 'Run Support Storm SuccessPlay' and 'Add Support Storm to my attention'. On the right side of the dashboard, a 'MY PORTFOLIO' summary card shows a 'PORTFOLIO VALUE' of \$7.65B and 'ACCOUNTS' of 11.6K. It also includes a 'HEALTH SCORE' of 70, with sub-metrics for 'HEALTH IMPROVED' (0) and 'HEALTH DECLINED' (0) over the last 14 days.

# Community

You are all creators

Build skills.  
Earn badges.  
Unlock new ideas.



180  
Accounts

320 Individuals

450  
Badges Issued

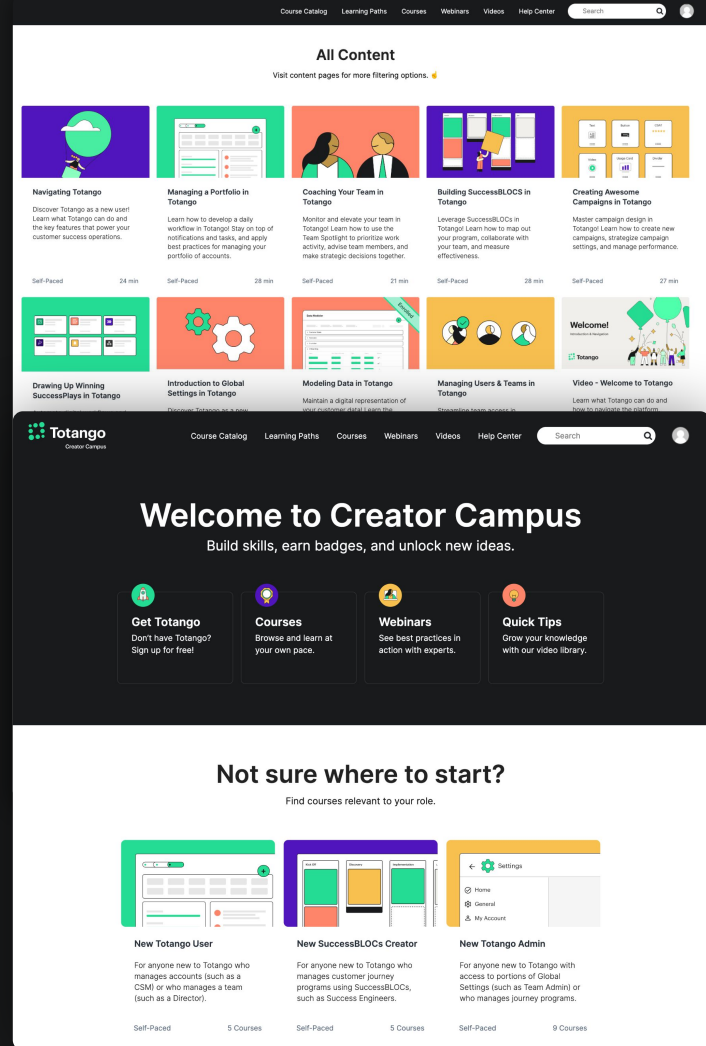
760 Course Enrollments

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

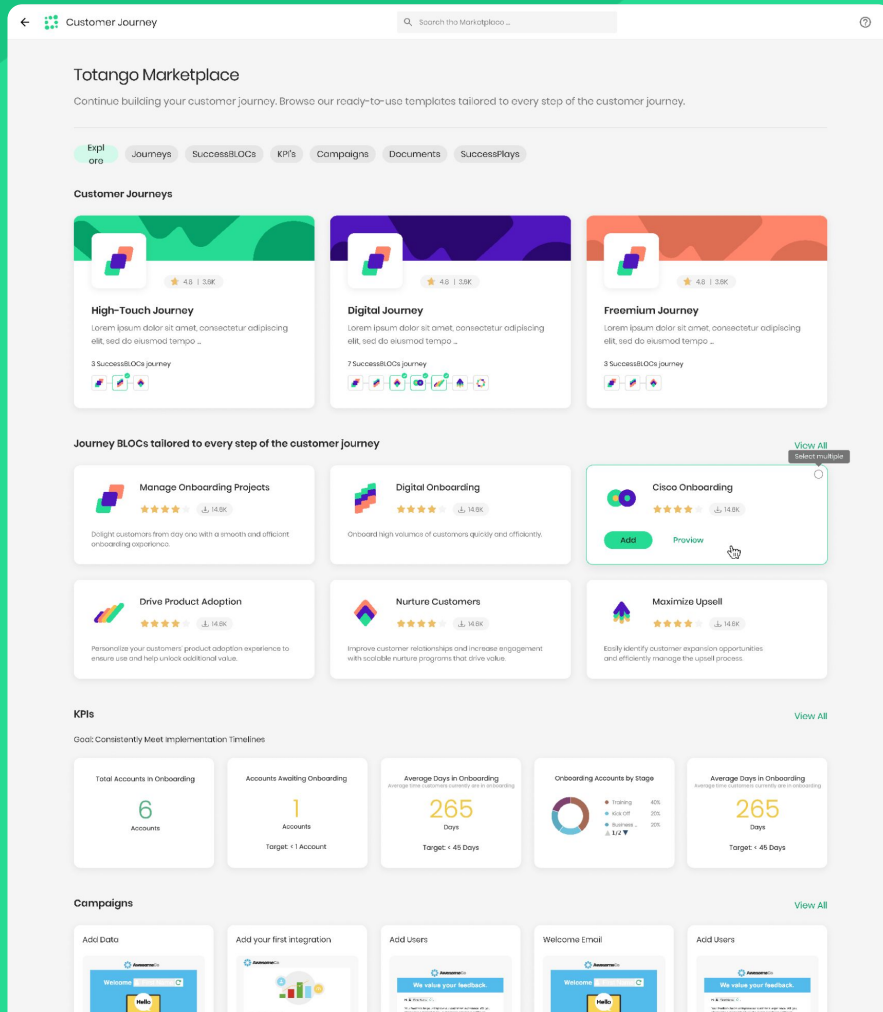
**6**

Wishlist items  
moved to planned



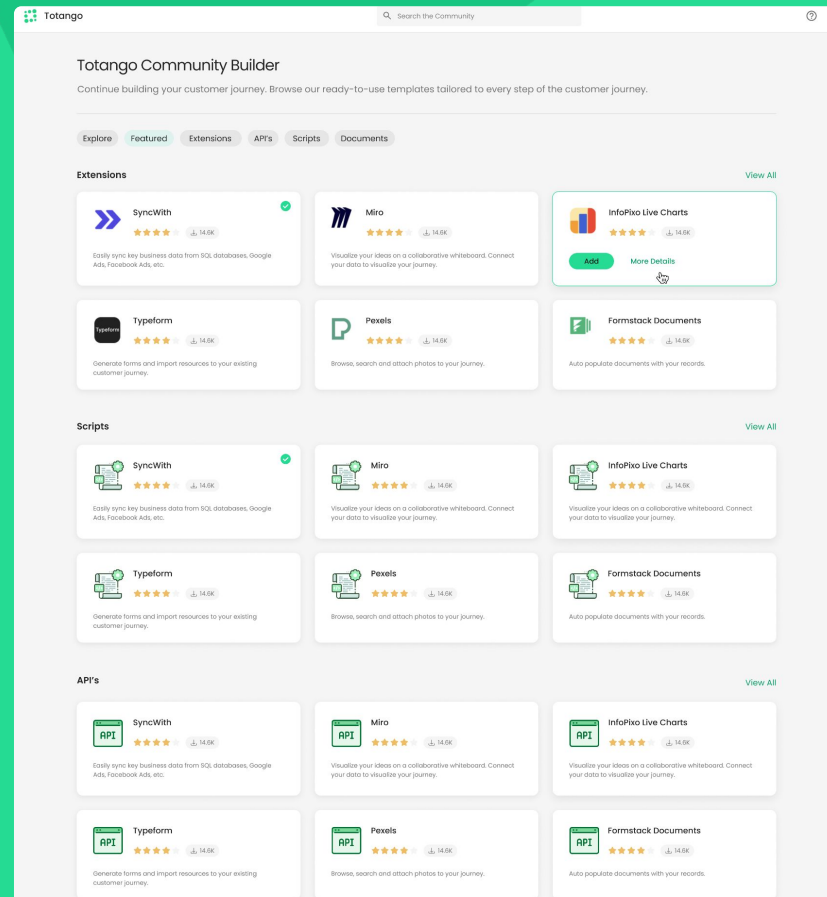
# Marketplace and community

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

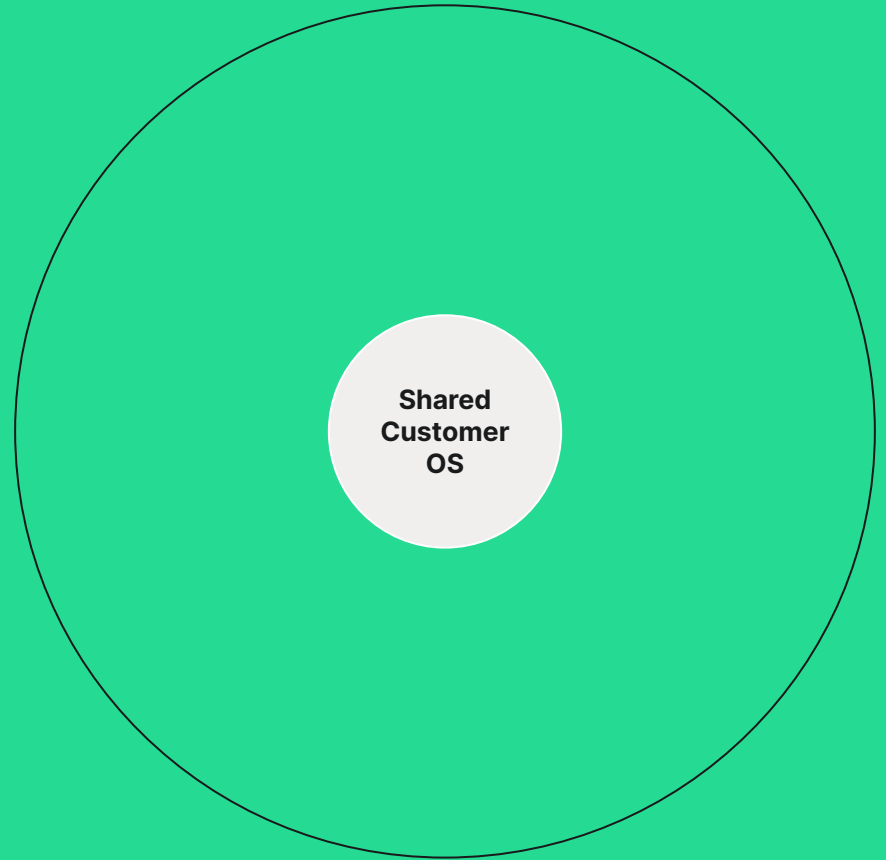


# Marketplace and creators

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

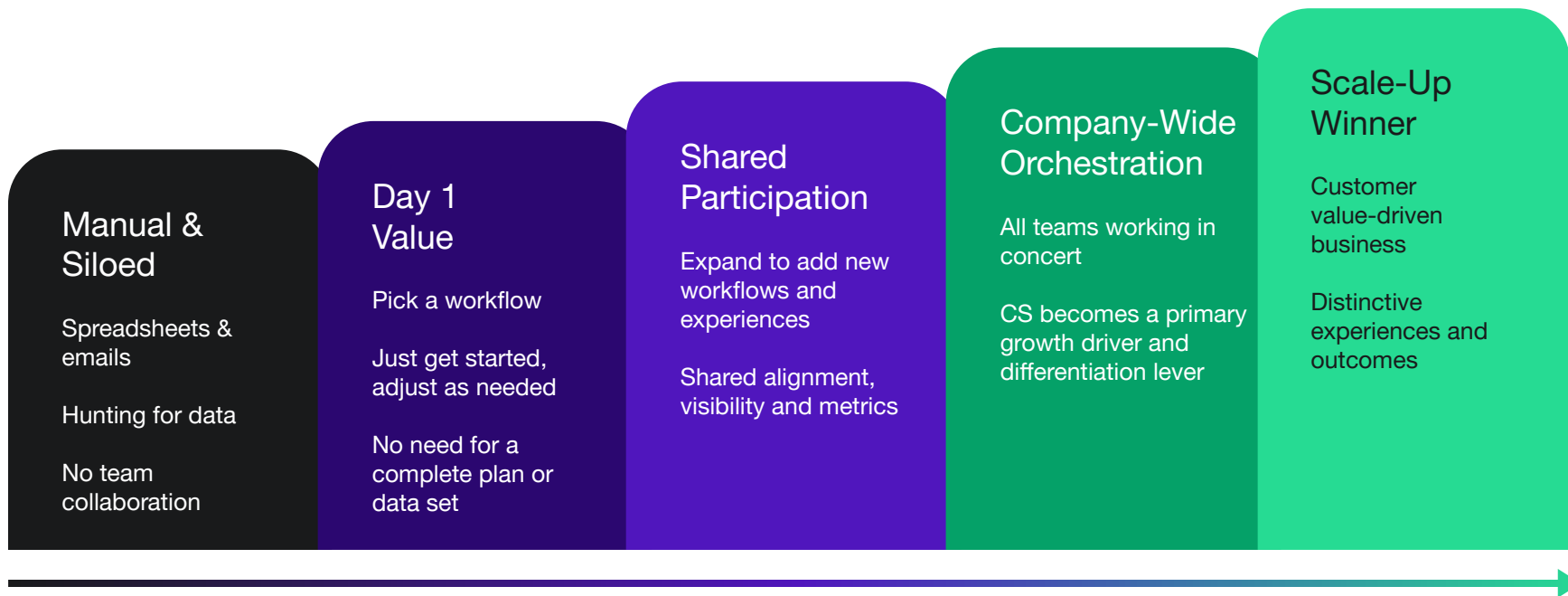


# Open Totango to Partner



# Back to Guy

# Start where you are and go



## Composable CS Maturity Model



**Thank you**

[totango.com](https://totango.com)