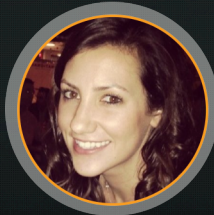




# CRUSHING YOUR QBR AGENDA



**Kelly DeHart**  
Director of Customer Success  
*Gainsight*



**Sara Venturi**  
Customer Success Manager  
*Gild*



# Agenda

- Determining the right EBR cadence
- Key goals of your EBR
- EBR Frameworks
  - Gainsight agenda & core slides
  - Gild agenda & core slides
  - EBR agenda for sponsor change
- Summary / Recommendations
- Questions



# Determining the right EBR cadence (Gainsight)

- We recommend outlining EBR SLAs. Consider SLAs by customer tier Example Tiering:
  - Strategic: Quarterly
  - Mid-Market: Every 6 Months
  - SMB: Once per Year
- Based on CSM load, ensure the desired EBR cadence is feasible (consider amount of time for prep, delivery & follow-up)
- Utilize CTAs (automated triggers) to prompt CSMs to conduct EBRs at the right time
  - Outline Playbooks with expected steps & due dates for each action
- Communicate your cadence to your customers to clearly manage their expectations



# Determining your EBR Cadence (Gild)

- Customers segmented into 2 Tiers
  - Tier 1 – Customer receives twice Annual EBRs
    - Conduct EBRs at month 4 & month 8 of contract
    - Schedule first EBR during Implementation Hand-Off Call
  - Tier 2 (Self-Service) - Light Quarterly Check-in
    - Conduct EBR if we identify opportunity for expansion
- Utilize CTAs to alert CSMs on timing to begin EBR preparation
- Adjust EBR cadence based on Code Red Alert
  - Change in Executive Sponsor



# 7 goals to accomplish in your EBR (Gild)

1. Demonstrate Value
2. Highlight Potential Value
3. Thank Customer
4. Goal Alignment and Measurement
5. Deepen Executive Relationship
6. Gauge Health and Likelihood to Renew
7. Identify Referenceable Users





# EBR Frameworks

## Gainsight First EBR Agenda



# Gainsight First EBR Agenda

- Introductions
- Company Updates
- EBR Purpose
- Partnership
  - Strategic Initiatives
  - Functionality Rollout
  - Gainsight Usage
  - Health Scorecard
- Product Momentum
- Recommendations & Next Steps



# EBR Purpose

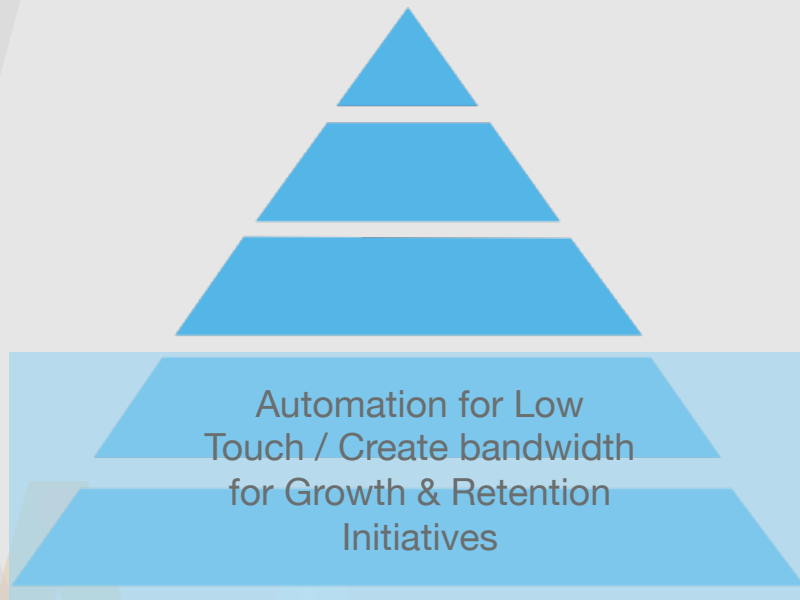
Designed to ensure strategic alignment & maximize the return on your investment







# Customer 2015 Strategic Initiatives



- **Automation & Scale:** Identify ways to automate touch points to provide a consistent customer experience
  - **Recommendation:** For Low or No Touch engagements, trigger email communications via Co-Pilot vs live CSM reach out
- **Upsell within Install Base:** Drive consistency in Upsell Engagement approach across the team
  - **Recommendation:** Identify Target customers for upsell via CTA triggers. Track success of upsell efforts to quantify ROI
- **Churn Reduction:** Rollout strategy to mitigate churn risk
  - **Recommendation:** Flag indicators of churn and target for CSM intervention. Track success of intervention to quantify ROI



# Gainsight Functionality Deployment

## Delivered

- Customer360
  - Holistic customer view, consolidation of data from multiple sources
- Cockpit Rollout
  - Workflow & Task Management
  - Proactive Calls to Action & Best Practice Playbooks
- Gainsight Health Scorecard
  - 5 Measures driving overall Health
  - Mix of Quantitative & Qualitative Measures
- Gainsight Home Dashboards
  - Customized Report Views: CSM View, Management View, Upcoming Renewals, etc.
- Sponsor Tracking

## Remaining Deliverables

- Adoption / Usage data pulled into Gainsight & Metric configuration
- Send first NPS Survey

## Ongoing Refinement

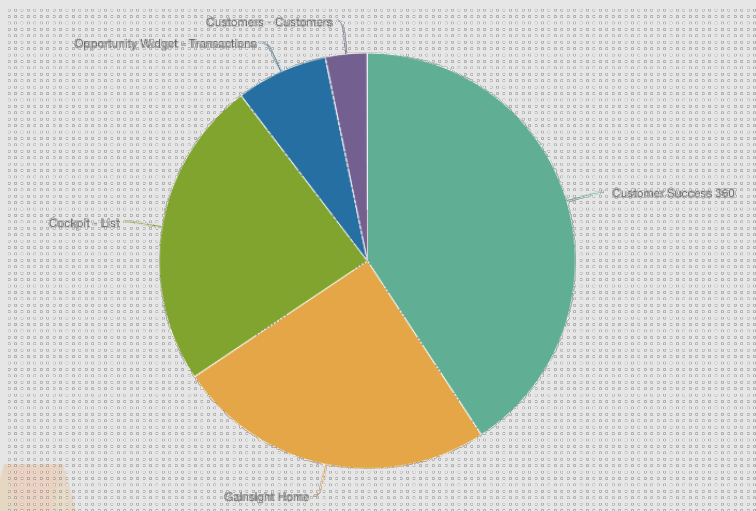
- Rollout Gainsight Co-Pilot for 1:Many Communications
- Determine SFDC Object to link in Cockpit, for easy editing by the team from CTA



# Top Gainsight Features & Users

## Top 5 Features utilized (last 90 Days)

*Represents 4,166 Page Views*



## Usage Stats:

- Average Weekly Page Views for Top Features: Customer 360, Gainsight Home & Cockpit
- Gainsight Power Users - 5 Users with >1,000 Page views over last 90 Days
- Identify behaviors we can emulate from Power Users to serve as best practices for rest of team

## Top Gainsight User Activity (total page views over the last 90 days)

| User Name         | Sum of Pageviews ▼ |
|-------------------|--------------------|
| ~ x               | == x               |
| Nikka Mathur      | 2,131              |
| Julia Guyadeen    | 1,742              |
| Elaine Cleary     | 1,521              |
| Kelly DeHart      | 1,382              |
| Barr Moses        | 1,349              |
| Carissa Aiello    | 955                |
| Scott Morris      | 922                |
| Denise Stokowski  | 747                |
| Kendra McClanahan | 692                |
| Lila Meyer        | 677                |



# Customer Gainsight Healthscore

## ♥ Health Score

70 ↔



### Health Summary:

- Customer Health is among the Top 10% for customers btwn 10-18 months old
- Partnership considers speaking engagements, case studies, references, product feedback
- Adoption is most heavily weighted measure - represents volume of Cockpit & Customer360 views and engagement across entire user base

88 ↑

**Relationship**



88 ↑

**Partnership**



88 ↑

**Self Sufficiency**



63 ↔

**Adoption**



50 ↔

**Growth**



70 ↔

**Last NPD**





# EBR Frameworks

## Gild Agenda





# Agenda

- Introductions
- Account Summary
  - Account Details
  - Partnership Review
- Measuring Success
  - Value Delivered
  - Usage Metrics and Insights
  - ROI – Hiring Success
- Gild Product Releases and Updates
- Next Steps



# Account Summary

- Contract Period
  - January 1, 2015 to January 1, 2016
  - Live as of February 3, 2015
- Account Team
  - Dedicated Customer Success Manager – Sara Venturi
  - Executive Sponsor – Stephanie Stapleton, VP of Customer Success
- Partnership
  - Company Lunch & Learn
  - On-Site Training for Recruiters
  - Hiring Manager Interview Training
  - Beta Program Participants
  - UI Testing & Feedback Sessions with Gild's Product Team
- THANK YOU for being a reference!



# Usage & Adoption

## Hire Candidates: Current Pipelines

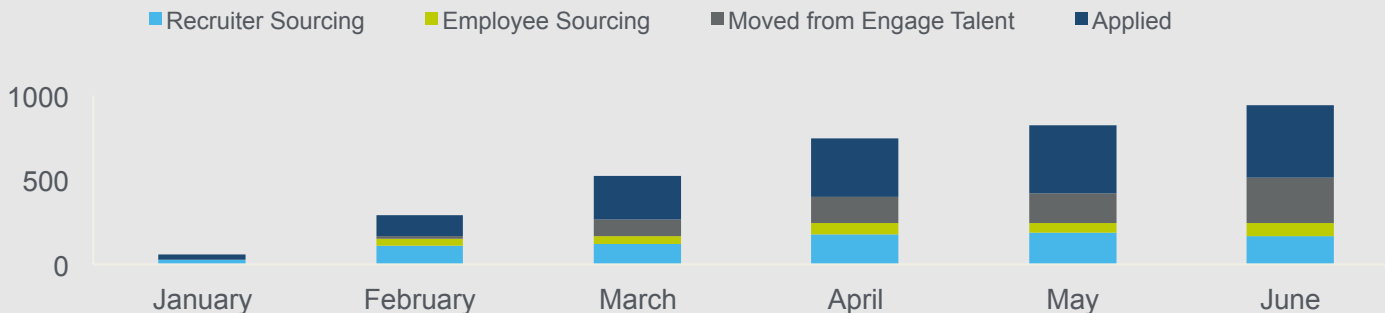
PHONE SCREENS  
CONDUCTED:

1629

INTERVIEW PANELS  
SCHEDULED:

378

### Profiles Created in Hire Candidates



#### Comments & Next Steps:

- Excellent growth in number of inbound candidates in 2015 so far.
- Employees seem to favor referring to open jobs rather than into nurturing programs. Make sure any referrals not immediately hired are continually contacted after current requisition closes.



# ROI: Business Intelligence for Hiring

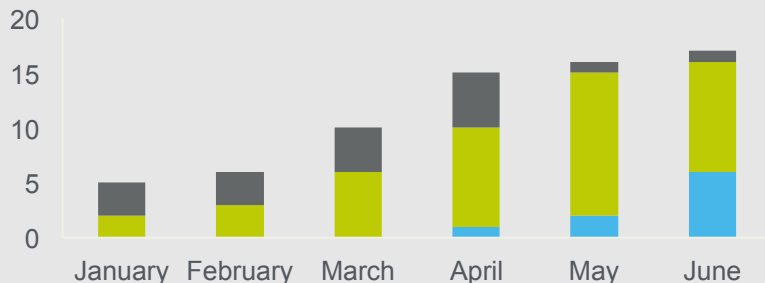
CANDIDATES HIRED WITH  
GILD:

64

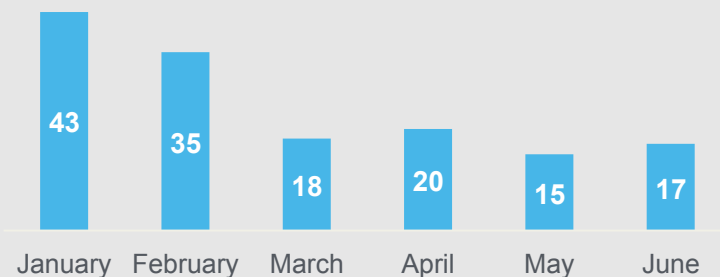
REDUCTION IN DAYS TO HIRE: 26

Jobs Hosted with Gild by Month Opened

■ Ongoing Hiring ■ Closed - On Schedule ■ Closed - Late



Average Business Days to Close  
by Month Opened



## Comments & Next Steps:

- As hiring slows in Q3, and overall company urgency around hiring evens out, maintain tight processes to keep time-to-hire low.
- Q3 is an ideal time to begin developer sourcing initiatives since Q4's focus is primarily on technical hiring.



# Product Updates – Business Intelligence

Replaces the need for a costly, external BI platform and applies predictive analytics and insight to every stage of the hiring process, delivering 360-degree information and easy, customized reports that help every job role make better decisions.



## AUTOMATED

No more Excel spreadsheets and no more manual work.



## INSTANT

Real-time intelligence with pre-scheduled reporting updates.



## CUSTOMIZABLE

Personalized, graphical reports and dashboards by job role.



## EASY

Everyone in your company is a BI expert with simple-to-use wizards for complex reports.





# EBR Frameworks

## Addressing Sponsor Change



# EBR agenda – addressing sponsor change

- Company Overview
  - Momentum
  - Product Overview
- Discussion on Customer Priorities
- Contract Summary
- Configuration Overview & Timeline
- Usage Trending & History
- Survey Feedback
- Recommendations & Next Steps





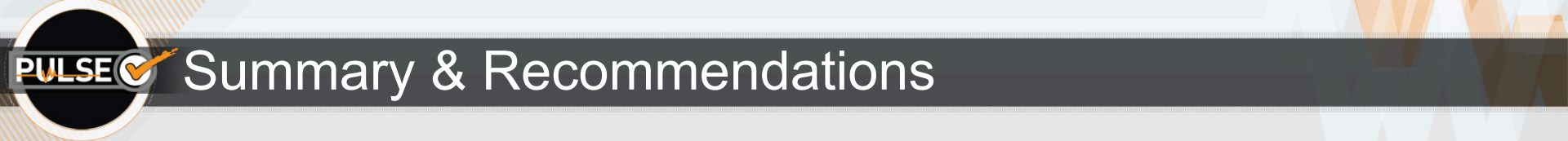
# Summary & Recommendations





# Summary & Recommendations

- Determine your EBR Cadence / SLAs
- Make a decision about who should be present in your EBRs (Exec Sponsor, product presence, etc)
- Build EBR Triggers / CTAs & Playbooks, to ensure CSMs engage with customers in a timely & consistent manner
- Outline the goals of your EBR and determine the Agenda accordingly



# Summary & Recommendations

- Work to determine the 'Core Slides' that should be used and adopted for each EBR
- Consider an off-cycle EBR to immediately address sponsor change
  - Adjust EBR messaging to re-align on goals & summarize the partnership to date
- Customer Facing Follow Up:
  - CSM to follow-up via email to share detailed Action Items / Next Steps and materials (EBR Deck)
  - Track status / completion of actions & goals from previous EBR, to share in the following one
- Internal Follow Up:
  - Share EBR notes, customer sentiment & action items via Chatter for company visibility





# Questions?

