

**SESSION #2**

CS Leadership Bootcamp - Q2 2024

# Executive Leadership Programs to Get Them Engaged and Keep Them Engaged

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**GETTING AND KEEPING  
EXECUTIVE STAKEHOLDERS  
ENGAGED IN THE  
PARTNERSHIP IS DIFFICULT.**

# WE HAVE TO CHANGE OUR APPROACH

## Getting Tactical Too Soon

Move straight to onboarding and product discussions.

## Minimal Focus on Results

Companies focus more on the product and adoption rather than results and impact.

## Lack of Thought Leadership

Companies and teams lose sight of the value beyond the product.

**START  
EARLY**

Don't kickoff the partnership without your Executive Stakeholder present.

We often focus on moving fast and as a result we go right into tactical onboarding and lose the opportunity to establish relationships early.

# SIMPLE WAYS TO ENGAGE THROUGHOUT THE JOURNEY

Partnership  
Kickoff

Onboarding  
Check-In

Executive  
Business  
Review

Advocacy  
Engagement

Pre-  
Renewal  
Discussion

# EXECUTIVE ENGAGEMENT PROGRAMS



Leadership  
Workshops



Customer  
Advisory  
Board



Executive  
Events



Executive  
Pairing  
Groups



# Leadership Workshops

- Monthly or Quarterly workshops designed to bring together leaders to tackle specific industry challenges
- Limited attendees with small group breakouts for ideation and brainstorming
- Private Slack or Community group to keep the discussion going

# Leadership Workshops

- 01.** Gauge interest from your customers in advance
- 02.** Select topics that are timely and relevant
- 03.** Limit attendees - 25 is a sweet spot; breakout groups of 4-5 for ideation
- 04.** Leave time for group presentations and Q&A
- 05.** Give the attendees a place to continue the conversation



# Customer Advisory Board

- Group of advisors that come together quarterly or bi-annually to discuss the current state and future of the industry
- Create private groups or channels to facilitate ongoing discussions
- Engage executives with investors and prospects as needed

# Customer Advisory Board

**01.**

Select executives who will bring the most value, not just biggest ARR

**02.**

Limit to 10 executives and determine the term length

**03.**

Establish the cadence of engagement - quarterly is standard

**04.**

Arrange for an in-person meeting if possible

**05.**

Align their engagement with things that are most relevant to them



# Executive Events

- Regional executive events focused on relationship development and future planning
- Exclusive and invite only - Senior leadership
- High-end events; think excursions, Michelin restaurants, sporting events etc.

# Executive Events

**01.**

Target cities with the largest customer penetration

**02.**

Partner with Marketing to ensure these are executed thoughtfully

**03.**

Reserve spots for the most senior executives in the partnership

**04.**

Build in discussions that the attendees will value

**05.**

Make the follow-up as strong as the event coordination



# Executive Pairing

- Gather information about each of your leaders and their companies
- Map together likeminded Executives into pairs or small groups of 3-4
- Create easy ways for them to communicate and keep in touch

# Executive Pairing

**01.**

Collect customer information early in the partnership

**02.**

Ask executives to opt into the pairing program - prioritize those who want it

**03.**

Facilitate introductions and small group meetings - Zoom or in-person

**04.**

Provide monthly prompts to facilitate productive discussions

**05.**

Track and measure the impact of the coordination - Switch every 6-12 months



# TAKE NOTE

1. Establish relationships with executives early on in the partnership
2. Don't rely solely on these programs and skip the opportunities to engage organically throughout the partnership
3. Diversify engagement across all of your customers - Track it at a company level
4. Intimate settings foster stronger engagement
5. Customers who participate have a higher likelihood of staying engaged

**THANK YOU**  
**Q&A**