

# The Journey of Success Planning to Health

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# AGENDA

1 | Align on a Common Outcome Framework

2 | Success Planning

3 | Health as the Leading Indicator

4 | Conclusion

# How VMware Helps

Achieve your business and technology objectives

Meet changing needs of  
customers and employees



Optimize operations  
and GTM speed



Strengthen security  
and business resilience



**App  
Modernization**



**Multi-Cloud**



**Virtual Cloud  
Network**



**Digital  
Workspace**



**Intrinsic  
Security**

The Digital Foundation for Successful Digital Business

# Our Customers are Transforming

## Customer focus

### Digital transformation

\$2.3T Digital Transformation spend projected by 2023<sup>1</sup>

### Shift to cloud & subscription

\$364B XaaS spend projected by 2023<sup>2</sup>

### Greater focus on outcomes

~50% of customers feel technology products do not deliver fully on business value goals<sup>3</sup>

Realization of outcomes through targeted Customer Success Lifecycle Offers



# Business Challenge: Streamline Customer Success

**From:** Decentralized  
& Reactive Centric

**To:** Unified & Optimized For  
Customer Value Realization

## Move to Cloud & Subscription

Focused on Bookings

- ✓ Define and Deliver ARR, Net Retention and Customer Health

## Collaboration with Sales & Product

Selling Features / Functions

- ✓ Common Customer Business Outcomes
- ✓ Value Realization Strategy

## Methodology

Mixed practices across franchises

- ✓ Cover ARR via monetized, free and digital
- ✓ Scale via processes, playbooks & Gainsight

## Churn/Retention

Lack of visibility and accountability

- ✓ Customer Health as our Mission Metric
- ✓ Risk and Retention Management Plays

## Customer Insights

Reporting varied by Business

- ✓ Customer Data Foundation
- ✓ Account, Product, Region Level Views

# Customer Journey Management





## Polling Question

What is the leading indicator of customer retention?

- a. Customer Health
- b. Success Plan Management
- c. cSAT / NPS
- d. Historic Spend Data

# What is an Outcome?



An achieved future state that can be verified through measurable results



Tied to a funded "top-level" initiative



Defined through the lens of a particular executive responsible for the future state



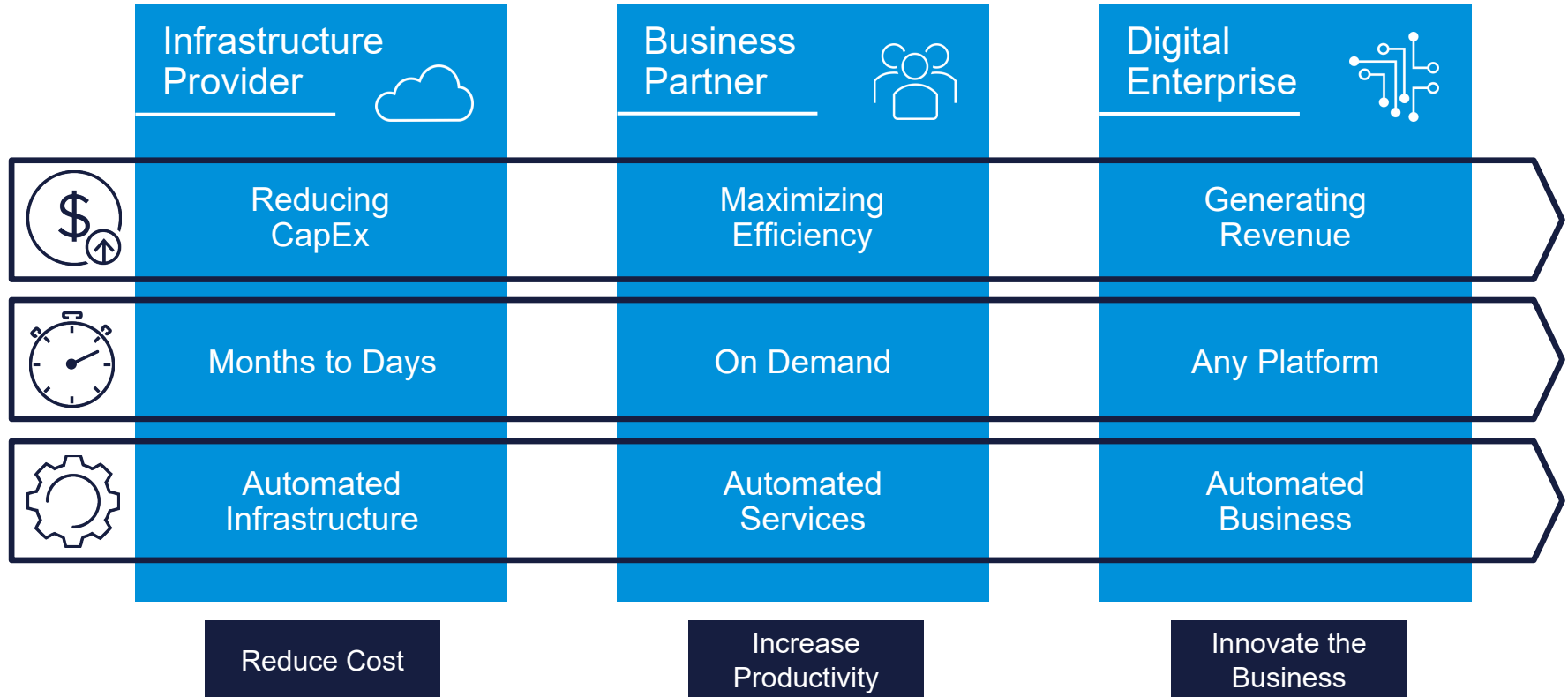
Colored by the interests of related stakeholders



Reached over time



# Prescriptive: Desired Business Outcomes

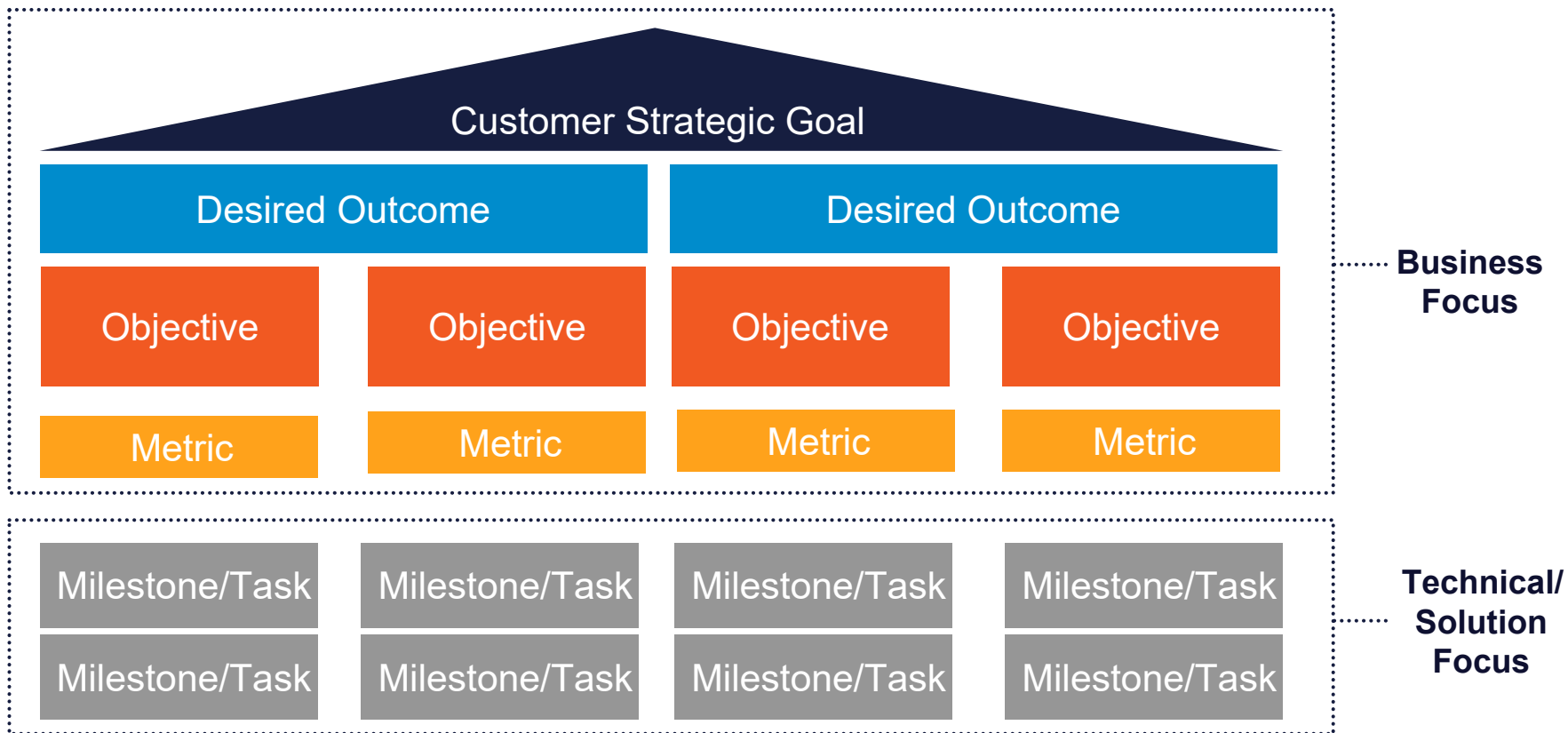


# Predictive: Common Success Plan Framework

- ✓ Leverage **Success Plan Framework** to outline **desired outcomes, objectives, and metrics**
- ✓ Define **milestones** and **owners** to drive progress and time-to-value
- ✓ Maintain the Success Plan as a **living document** that is iterated upon with customer input and managed in real time



# Predictive: Success Plan Framework



# Build a Success Plan with Your Customer

## Know Your Customer

Account Plan and Outcome Focused Approach

Products and Solutions Deployed

Existing customer engagements and insights from Support, Services and Technical Account Management

## Jointly Build the Success Plan

Reinforce alignment of defined Business Outcomes and Objectives

Create Milestones, Tasks, Owners, and Measurements

Obtain signoff and agree to regular business review cadence

Iterate – the Success Plan is a living document

## Engage Stakeholders

Sponsors & Champions

Economic Buyer

Executive Leadership

Manager / Initiative Owner

Practitioner / Users

Partners

# Proactive: Success Plans are interlocked with Health Score

### Acme Success Plan Framework

Expand our existing partnerships, diversify by accelerating growth, deliver best-in-class customer experiences, operate with a strong balance sheet

Increase Market Share	Reduce Costs & Complexity	Protect Customer Data	Improve Reliability & Availability
Deploy Cloud Native Modern Apps	Automate & Consolidate IT Resources	Ensure Environment Security & Compliance	Increase Architecture Resiliency
Metric - TBD	Metric - TBD	Metric - TBD	Metric - TBD

Optimize TAS Foundations	vRealize Optimization	M
TKGI Roadmap	Deploy WS1	DF

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### Success Plan in Gainsight

Success Plans are maintained in Gainsight and feed the Customer Health Score

The screenshot shows a Gainsight Success Plan for 'Acme Corp'. It includes a summary section with 'Customer Health Score', 'Customer Health Trend', 'Milestones', 'Cases', and 'ESQ/Health'. Below this is a table of success plan items with columns for 'Name', 'Status', 'Category', and 'Due Date'. The table lists several items, including 'vSphere Architecture Resiliency' and 'vSphere Network, Storage, and vMotion Migration'.

### Customer Health Scorecard

The scorecard offers a dynamic view of critical metrics to drive customer conversations

The scorecard dashboard for 'Cloud Innovations Inc.' displays various metrics and insights. It includes a 'Success Plan Status' table, a 'Milestone Status Summary' donut chart, and four 'Value Insights' sections: Business Value Insights (25% of target), Experience Value Insights (20% of target), Performance Value Insights (10% of target), and Highlighted Support Disputes (10% of target). A legend at the bottom indicates 'Other: Forfeited by Customer Co.'



## Polling Question

Are you currently leveraging Customer Health Score to measure outcomes delivered on your Success Plan?

- a. Yes
- b. No

# The three facets of Customer Health

## Business value

Are customers progressing along the path to outcomes, reaching milestones as planned?

### Metrics

- Outcomes Attainment (%)
- Time to First Value (days)
- Consumption (%)

## Experience value

Is every engagement providing customers with a useful and exceptional experience?

### Metrics

- Customer CSAT
- SR Volume & aging (#)
- PSO credit utilization (%)

## Performance value

Are VMware products delivering the results customers expect and require?

### Metrics

- Product version status
- Product features used (%)
- PRs escalated (%)

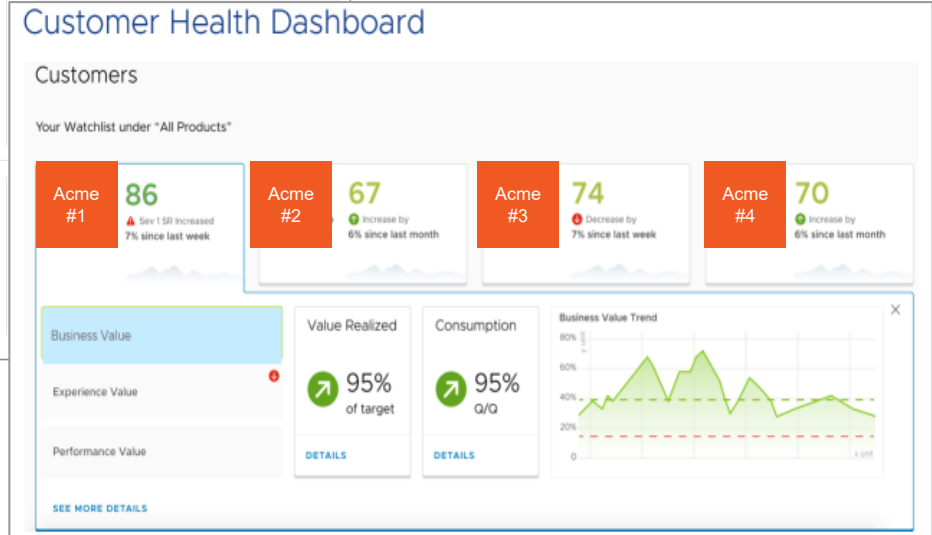
# Customer Health Scorecard



### VMware Engagements and Credits

Professional Services Engagements

Engagement Name	Actual Start	Planned/Actual Finish	Project Status	Customer Sat.
Cloud Innovations Inc. VMC Networking (CINOTHE&LTD)	8/3/2020	10/30/2020	On Track	Good





# 3 Key Takeaways

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## Prescriptive

Align on a **Common Outcome Framework** across Product, Sales and Customer Success



## Predictive

The **Success Plan** is the joint agreement with our customers for how they will achieve value realization from their investment



## Proactive

Measure and monitor **Health** as the leading indicator of our customer's progress

QUESTIONS?

# THANK YOU

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## Contact Details

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