

# Forward-Looking Statements

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# Salesforce

## *Driving Hyper Growth*

Conor O'Malley  
Regional Vice President

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comally@salesforce.com  
@conorom



# What is Account Management?

**Key account management** (KAM) defines *full relationship* between your business and the customers you *are selling to*. It describes the individual approach of sales people to their customers in order to create long everlasting business relationship.

# What is Account Management?

## 1. Sales (Driving Revenue)

New Business Acquisition

#BuildPipe

#ClosePipe

White-spacing (Grow revenue within existing customer base)

#Upsell

#CrossSell

## 2. Customer Experience

Culture – Obsessed about customer success?

How important is customer retention & Attrition

Do you have visibility (control) of these metrics?

# Today's Agenda



**Salesforce as a Start-up**



Processes to Drive Growth



**Salesforce Customer Retention process**

# The Start



# Marc's V2MOM

Salesforce.com's First V2MOM, 4/12/1999

## **Vision**

Rapidly create a world-class internet company/site for sales Force Automation.

## **Values**

1. World-class organization
2. Time to market
3. Functional
4. Usability (Amazon quality)
5. Value-added partnerships

## **Methods**

1. Hire the team
2. Finalize product specification and technical architecture
3. Rapidly develop the product specification to beta and production stages
4. Build partnerships with big e-commerce, content, and hosting companies
5. Build a launch plan
6. Develop exit strategy: IPO/acquisition

## **Obstacles**

1. Developers
2. Product manager/business development person

## **Measures**

1. Prototype is state-of-the-art
2. High-quality functional system
3. Partnerships are online and integrated
4. Salesforce.com is regarded as leader and visionary
5. We are all rich

# FY18 V2MOM

## Vision

The Customer Company---Connect to Your Customers in a Whole New Way.

Salesforce creates and delivers the most innovative enterprise applications and services for sales, service, marketing, communities, analytics, apps, IoT, and digital commerce. We deliver the trusted success of every customer while taking care of our people with a culture of enablement, opportunity, career development, tools, and work/life balance as 1Salesforce.

## Values

**Trust** – Nothing is more important than the security, trust and success of every customer, partner and employee. We live our values by being our customers’ trusted advisor, delivering the world’s most trusted Customer Success Platform, and by growing, motivating and aligning our employees with opportunity and development. We are committed to the highest levels of ethics and integrity. Our

#EinsteinAI

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"25K people at this company, wake up with one mission, and that is to make sure our customers are successful."

**KEITH BLOCK**  
Vice Chairman, President,  
and COO  
Salesforce



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# Together, We're Building a Path Forward

“Innovator of  
the Decade”  
**Forbes**

September  
2016

FORTUNE  
**100  
BEST**  
COMPANIES  
TO WORK FOR  
2016

2009 • 2010 • 2011  
2012 • 2013 • 2014  
2014 • 2015 • 2016

**Forbes**

The world's most  
innovative companies

2011 • 2012 • 2013  
2014 • 2015 • 2016

FORTUNE  
**500**  
2016

**\$1.71B** FY17Q3  
revenue

**24K** employees

**\$389B** in GDP impact  
by 2020\*

**2M** jobs created  
by 2020

● IDC

IDC White Paper, sponsored by Salesforce,  
"The Salesforce Economy," August 2016





Salesforce as a Start-up



Processes to Drive Growth



Salesforce Current Growth Strategy

# Salesforce 3 Pillars That Enable Growth

## Focus

Customer Driven  
Focus

- **Key deal**
- **Run Rate**
- **Renewals**

## Faith

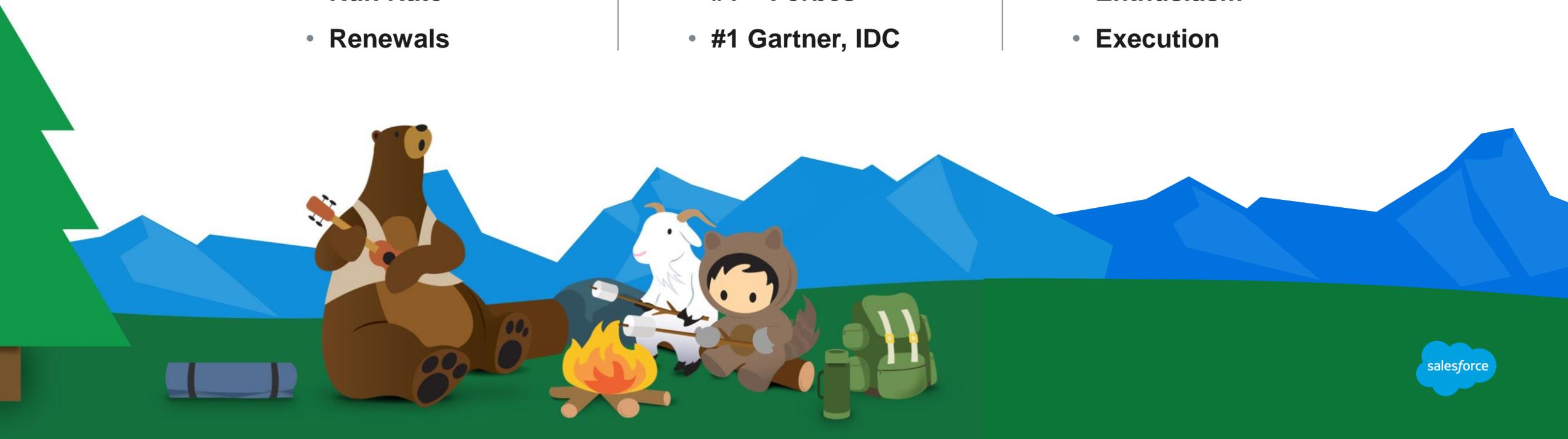
Belief in our  
solutions/services

- **Innovation**
- **#1 – Forbes**
- **#1 Gartner, IDC**

## Fire

Passionate about our  
KAMs

- **Energy**
- **Enthusiasm**
- **Execution**



# Focus on Driving Revenue



# Leads

Lead Conversion Rate

Win Rate

Average Contract Size

# Sales Cloud Drives Customer Success



Source: Salesforce Customer Relationship Survey conducted 2014-2016 among 10,500+ customers randomly selected. Response sizes per question vary.

# Overview: Lead Generation

**salesforce** Contact us.  
Questions? Call us at 0800 0921223 (Freephone).

**Get in touch.**  
Salesforce.com is proud to be the world leader in customer relationship management (CRM). If you're considering CRM, or just want more information, we're happy to answer all your questions and get you set up. Simply fill out the form, or for immediate assistance, call us at 0800 0921223 (Freephone).

Trusted by companies of any size, in every industry, including

**Tell us a little about yourself, and we'll be in touch right away.**  
Please complete all fields.

Conor

O'Malley

SMB Manager

comalley@salesforce.com

+353871202018

Salesforce.com

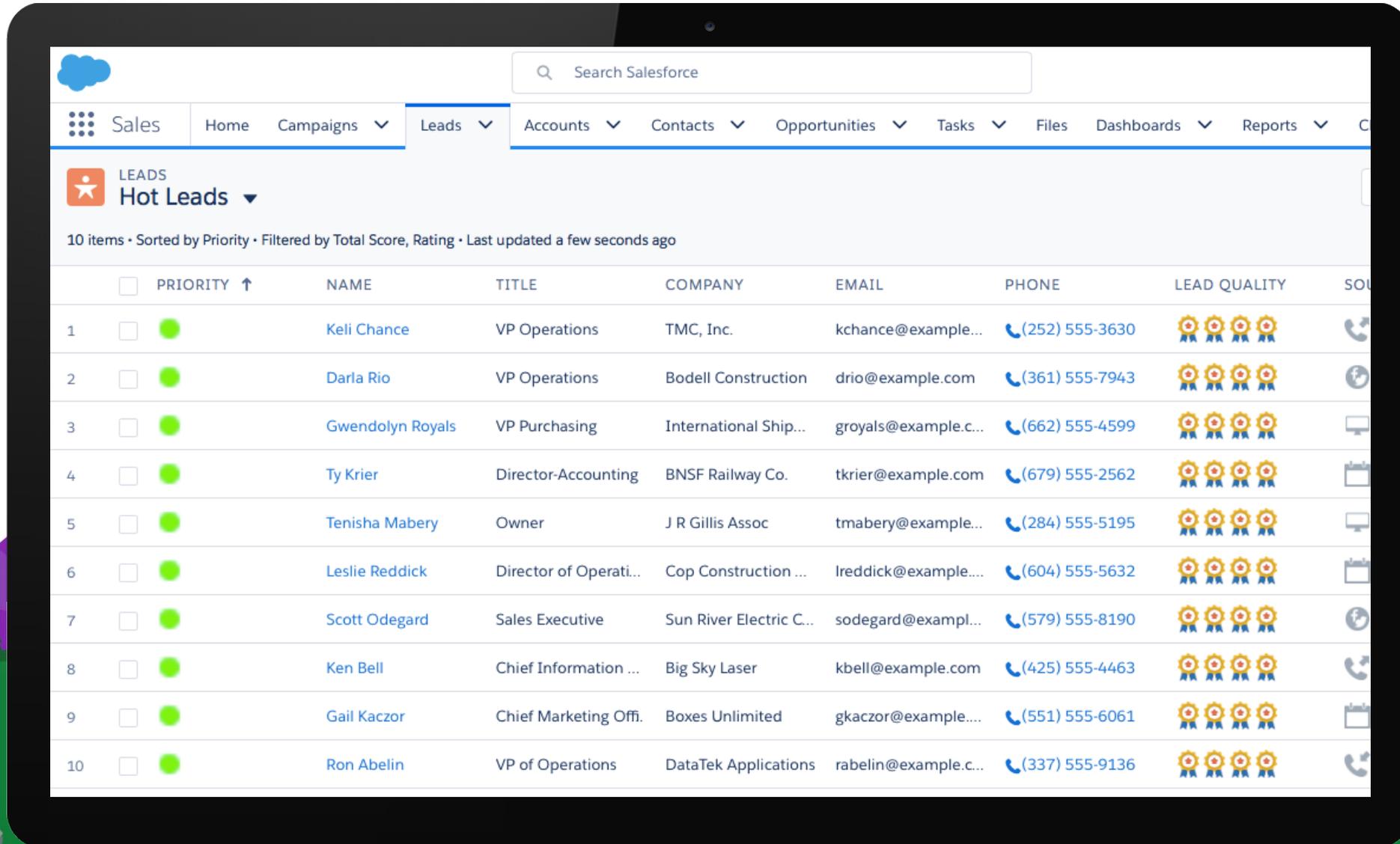
2,000+ employees

Sales

Questions/Comments

**salesforce**

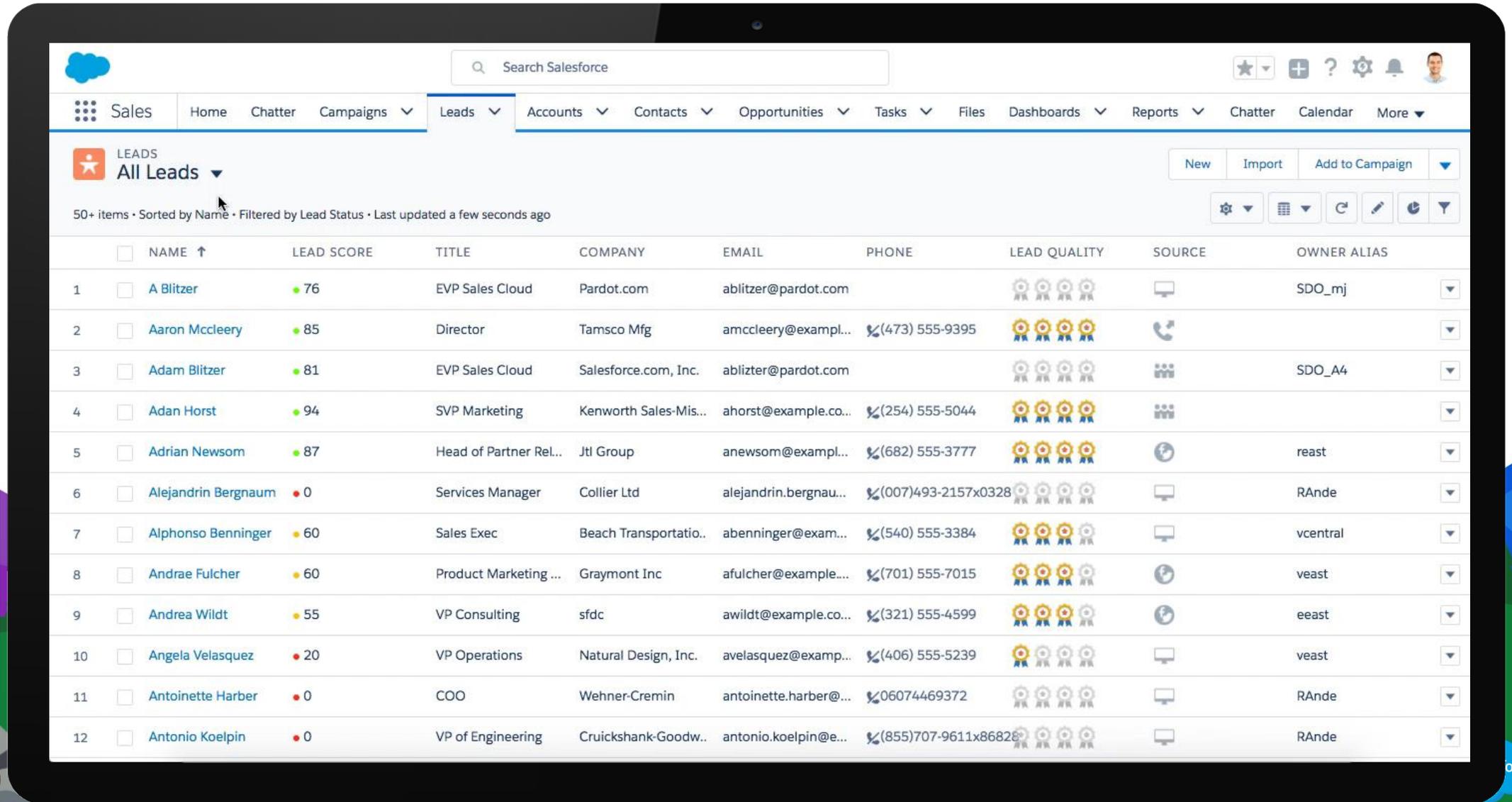
# Overview: Lead Management



The screenshot displays the Salesforce interface for managing leads. At the top, there is a search bar labeled "Search Salesforce". Below it, a navigation menu includes "Sales", "Home", "Campaigns", "Leads", "Accounts", "Contacts", "Opportunities", "Tasks", "Files", "Dashboards", and "Reports". The "Leads" section is active, showing "LEADS Hot Leads" with a dropdown arrow. Below this, a summary indicates "10 items • Sorted by Priority • Filtered by Total Score, Rating • Last updated a few seconds ago".

	<input type="checkbox"/>	PRIORITY ↑	NAME	TITLE	COMPANY	EMAIL	PHONE	LEAD QUALITY	SOURCE
1	<input type="checkbox"/>	●	Keli Chance	VP Operations	TMC, Inc.	kchance@example...	☎(252) 555-3630	🏆🏆🏆🏆	☎
2	<input type="checkbox"/>	●	Darla Rio	VP Operations	Bodell Construction	drio@example.com	☎(361) 555-7943	🏆🏆🏆🏆	🌐
3	<input type="checkbox"/>	●	Gwendolyn Royals	VP Purchasing	International Ship...	groyals@example.c...	☎(662) 555-4599	🏆🏆🏆🏆	📄
4	<input type="checkbox"/>	●	Ty Krier	Director-Accounting	BNSF Railway Co.	tkrier@example.com	☎(679) 555-2562	🏆🏆🏆🏆	📄
5	<input type="checkbox"/>	●	Tenisha Mabery	Owner	J R Gillis Assoc	tmabery@example...	☎(284) 555-5195	🏆🏆🏆🏆	📄
6	<input type="checkbox"/>	●	Leslie Reddick	Director of Operati...	Cop Construction ...	lreddick@example....	☎(604) 555-5632	🏆🏆🏆🏆	📄
7	<input type="checkbox"/>	●	Scott Odegard	Sales Executive	Sun River Electric C...	sodegard@exampl...	☎(579) 555-8190	🏆🏆🏆🏆	🌐
8	<input type="checkbox"/>	●	Ken Bell	Chief Information ...	Big Sky Laser	kbell@example.com	☎(425) 555-4463	🏆🏆🏆🏆	☎
9	<input type="checkbox"/>	●	Gail Kaczor	Chief Marketing Offi.	Boxes Unlimited	gkaczor@example....	☎(551) 555-6061	🏆🏆🏆🏆	📄
10	<input type="checkbox"/>	●	Ron Abelin	VP of Operations	DataTek Applications	rabelin@example.c...	☎(337) 555-9136	🏆🏆🏆🏆	☎

# Overview: Lead Qualification



The screenshot displays the Salesforce interface for lead qualification. At the top, there is a search bar labeled "Search Salesforce" and a navigation menu with options like Sales, Home, Chatter, Campaigns, Leads, Accounts, Contacts, Opportunities, Tasks, Files, Dashboards, Reports, Chatter, Calendar, and More. Below the navigation, the "LEADS" section is active, showing "All Leads" with options for "New", "Import", and "Add to Campaign". A summary indicates "50+ items • Sorted by Name • Filtered by Lead Status • Last updated a few seconds ago".

	<input type="checkbox"/>	NAME ↑	LEAD SCORE	TITLE	COMPANY	EMAIL	PHONE	LEAD QUALITY	SOURCE	OWNER ALIAS
1	<input type="checkbox"/>	A Blitzer	76	EVP Sales Cloud	Pardot.com	ablitzer@pardot.com		4/4	Computer	SDO_mj
2	<input type="checkbox"/>	Aaron Mccleery	85	Director	Tamsco Mfg	amccleery@exampl...	(473) 555-9395	5/5	Phone	
3	<input type="checkbox"/>	Adam Blitzer	81	EVP Sales Cloud	Salesforce.com, Inc.	ablitzer@pardot.com		4/4	Group	SDO_A4
4	<input type="checkbox"/>	Adan Horst	94	SVP Marketing	Kenworth Sales-Mis...	ahorst@example.co...	(254) 555-5044	5/5	Group	
5	<input type="checkbox"/>	Adrian Newsom	87	Head of Partner Rel...	Jtl Group	anewsom@exampl...	(682) 555-3777	5/5	Phone	reast
6	<input type="checkbox"/>	Alejandrin Bergnaum	0	Services Manager	Collier Ltd	alejandrin.bergna...	(007)493-2157x0328	4/4	Computer	RAnde
7	<input type="checkbox"/>	Alphonso Benninger	60	Sales Exec	Beach Transportatio..	abenninger@exam...	(540) 555-3384	4/4	Computer	vcentral
8	<input type="checkbox"/>	Andrae Fulcher	60	Product Marketing ...	Graymont Inc	afulcher@example....	(701) 555-7015	4/4	Phone	veast
9	<input type="checkbox"/>	Andrea Wildt	55	VP Consulting	sfdc	awildt@example.co...	(321) 555-4599	4/4	Phone	eeast
10	<input type="checkbox"/>	Angela Velasquez	20	VP Operations	Natural Design, Inc.	avelasquez@examp...	(406) 555-5239	4/4	Computer	veast
11	<input type="checkbox"/>	Antoinette Harber	0	COO	Wehner-Cremin	antoinette.harber@...	06074469372	4/4	Computer	RAnde
12	<input type="checkbox"/>	Antonio Koelpin	0	VP of Engineering	Cruickshank-Goodw..	antonio.koelpin@e...	(855)707-9611x86825	4/4	Computer	RAnde

# Overview: Operational Excellence

**Sales** Home Chatter Forecasts Accounts Opportunities Reports Dashboards Cases Campaigns Leads Contacts Files Sales C

## Brands - Phase 1: Service, MC Corporate edition, Social, Ad studio

+ Follow SE Update Edit Deal C

### Crush the Competition

Competitive Status 2 - Even with Competition	Date to Revisit ⓘ
Current System SAP	Competitive Notes
Primary Competitor SAP Cloud for Service	Our Competitive Differentiators ⓘ
Other Competitor Description ⓘ	

### SUCCESS Selling Methodology

Compelling Event ⓘ Q3 is most busy period, want to be up and running before	Red Flags ⓘ
Customer Use Case ⓘ One central system for front office Deliver faster and professional service anywhere, anytime Spot upsell, create Marketing Campaign from results	Connect the Dots
Top Priorities ⓘ Extend Service department + Communication systems	Marc Team Champion ⓘ
Business Case (ROI) ⓘ Increased CSAT and CX Increased Revenue Increased Productivity	Deal Sponsor ⓘ

### Gaps (Opportunity) (0)

### Specialist Forecasts (1)

SAF-00701120  
Forecast Type: Service Cloud  
Specialist AE ... USD 0.00  
Specialist AE S... 03 - Validating Benefits & Value

### EBC Meetings (Opportunity) (0)

### Contact Roles (3+)

-luisert	Role: Decision Maker Title: CMO
Mortel	Role: Decision Maker Title:
Helmont	Role: Not Selected Title: Teamleider CS

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# Overview: Operational Excellence

The screenshot displays the Salesforce CRM interface for an account record. The navigation bar at the top includes 'Sales', 'Home', 'Chatter', 'Forecasts', 'Accounts', 'Opportunities', 'Reports', 'Dashboards', 'Cases', 'Campaigns', 'Leads', 'Contacts', and 'Files'. The account name is 'Brands - Phase 1: Service, MC Corporate edition, Social, Ad studio'. The record is organized into several sections:

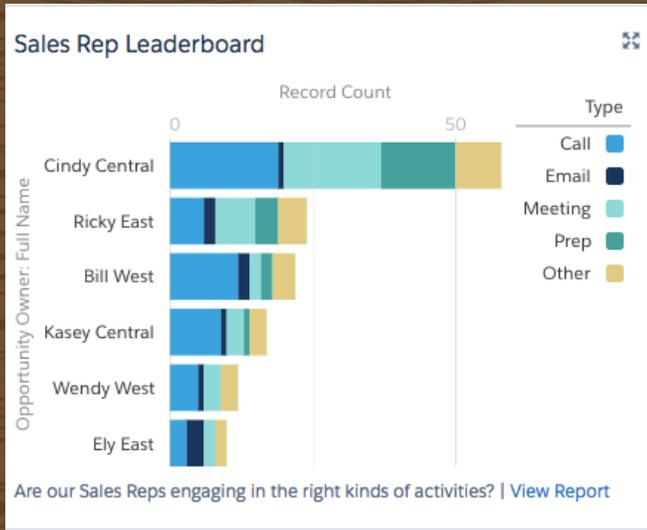
- Decision Maker:** CMO + CIO + approval board
- Decision Criteria:** CMO + CIO + approval board
- Challenges:** Deliver better service to customers internationale
- Financial Drivers:** CRM + Marketing is in the growth plan for this year
- Personal Drivers:** CIO is responsible for choosing the right IT landscape that allows them to grow. CMO needs to be able to measure success and invest on right campaigns.
- Next Steps:** 30/03 SB - On-site demo /w SE done, well received. Introduced partners Beethree + Harvest Digital. Next: on-site to agree on MCP 05/04
- Mutual Close Plan:**
  - 06-20 April: Scope with partners
  - 07/04: Proposal Salesforce
  - 12/04: Feedback on Proposal
  - 13-14 or 17-18 April: Workshop Salesforce on-site
  - 14/04 or 18/04: Deliver final contract
  - 25/04: Sign contract by
  - 10/05: Go-live on licenses
  - 10/05: Start implementation partners
  - 15/06: Pilot Service / Marketing
  - 01/07: Go live internal
- Description:** >>>BUSINESS DESCRIPTION
- Fitting sells lighting in 11 countries in Europe, B2B and B2C. Design & manufacture & distribute:**

On the right side, there are three panels:

- Opportunity Team (3+):** Ciaran McGowan (Account Executive), Jihad Dannawi (Account Executive), Karim Nadi (Senior Account Executive).
- Files (1):** Holodeck (PPT, Mar 24, 2017, 121.5MB).
- Notes & Attachments (3):** Holodeck (PPT, Mar 24, 2017, 121.5MB), Discovery.docx (Attachment, Mar 20, 2017), and Holodeck.compressed.pdf.

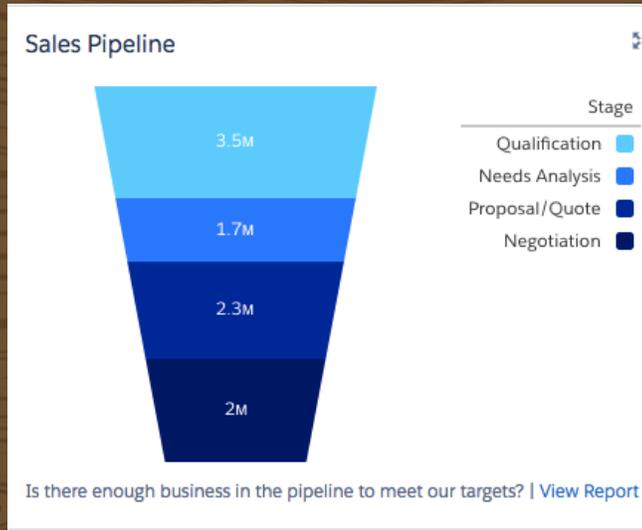
# We Always Look for Impact

## Activities



- # Calls
- # Meetings
- # Accounts Health Checks
- # Events/ Content

## Pipeline



- Pipe Created
- Pipe By Product/ Region/ Segment
- Pipe Progression
- Lead Conversion

## Performance



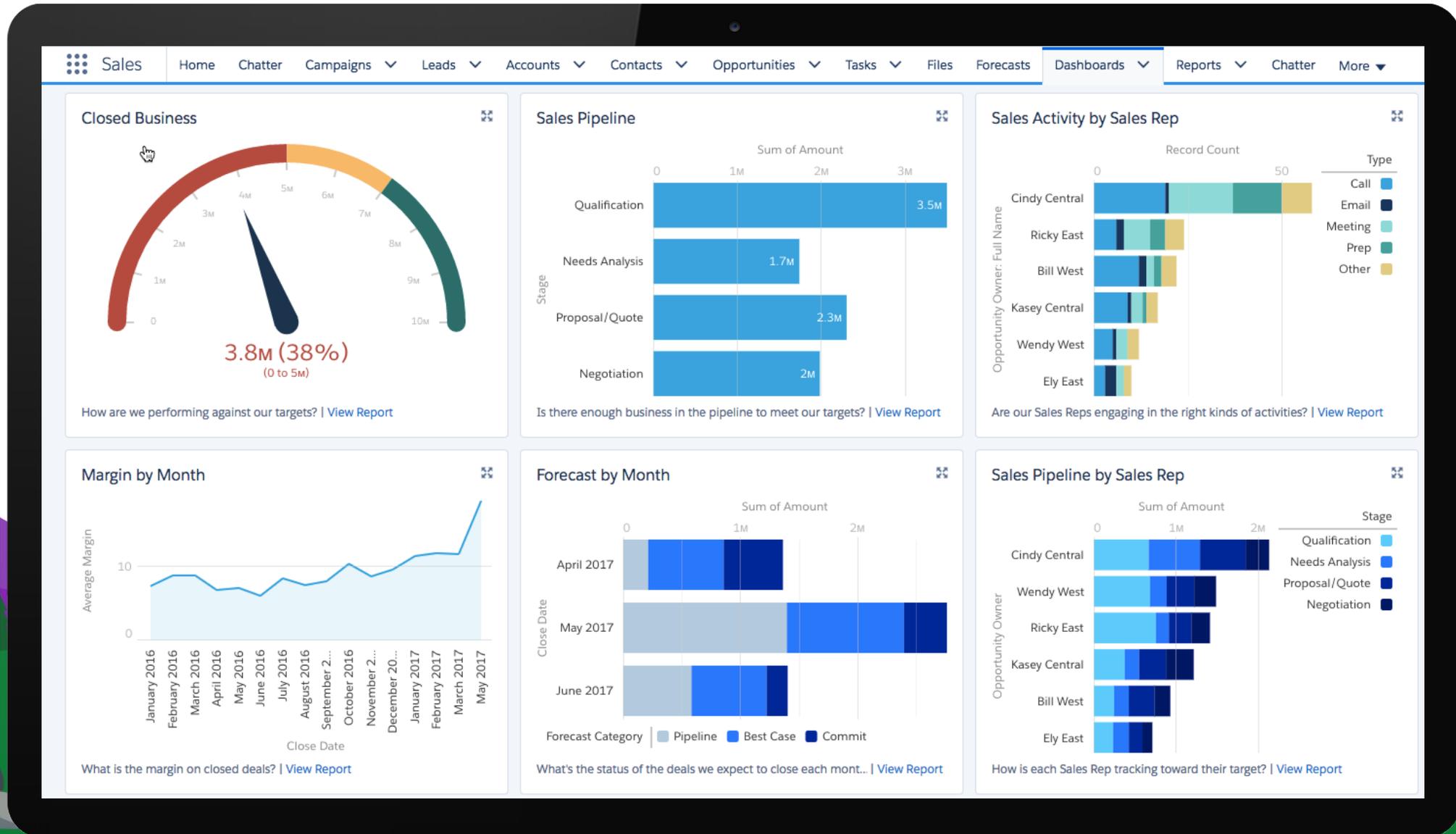
- Win rates
- Closed business Trends
- Industry sales
- Cloud sales

# Forecast

		Close Month	April 2015									Grand Total
10k deal breakdown	organic versus forecasted	Opportunity Owner	Billy Kelly	Conor Keatings	Darragh Henry	Deirdre Foy	Kenneth Goonery	Richard Hoare	Stephen Fallon	Stephen Hannon	Subtotal	
Less than 10k	organic	Sum of Amount (converted) Record Count	GBP 18,509.76 20	GBP 8,828.44 11	GBP 5,481.82 8	GBP 9,721.14 12	GBP 18,488.82 12	GBP 29,392.91 21	GBP 13,154.04 6	GBP 8,974.02 14	GBP 112,550.95 104	GBP 112,550.95 104
	forecasted	Sum of Amount (converted) Record Count	GBP 3,658.94 1	GBP 0.00 0	GBP 0.00 0	GBP 8,530.22 3	GBP 4,676.25 2	GBP 6,355.00 2	GBP 5,253.95 3	GBP 8,072.28 2	GBP 36,546.64 13	GBP 36,546.64 13
	<b>Subtotal</b>	Sum of Amount (converted) Record Count	GBP 22,168.71 21	GBP 8,828.44 11	GBP 5,481.82 8	GBP 18,251.36 15	GBP 23,165.07 14	GBP 35,747.91 23	GBP 18,407.99 9	GBP 17,046.30 16	GBP 149,097.59 117	GBP 149,097.59 117
10k - 50k	organic	Sum of Amount (converted) Record Count	GBP 6,784.02 1	GBP 12,990.72 1	GBP 0.00 0	GBP 0.00 0	GBP 0.00 0	GBP 9,208.08 1	GBP 0.00 0	GBP 0.00 0	GBP 28,982.82 3	GBP 28,982.82 3
	forecasted	Sum of Amount (converted) Record Count	GBP 20,259.96 2	GBP 8,640.00 1	GBP 0.00 0	GBP 0.00 0	GBP 0.00 0	GBP 35,364.34 2	GBP 0.00 0	GBP 35,439.30 2	GBP 147,920.30 10	GBP 147,920.30 10
	<b>Subtotal</b>	Sum of Amount (converted) Record Count	GBP 27,043.98 3	GBP 21,630.72 2	GBP 0.00 0	GBP 0.00 0	GBP 0.00 0	GBP 44,572.42 3	GBP 0.00 0	GBP 35,439.30 2	GBP 176,903.12 13	GBP 176,903.12 13
<b>Grand Total</b>		Sum of Amount (converted) Record Count	GBP 49,212.69 24	GBP 30,459.16 13	GBP 5,481.82 8	GBP 18,251.36 15	GBP 23,165.07 14	GBP 80,320.33 26	GBP 18,407.99 9	GBP 52,485.60 18	GBP 326,000.71 130	GBP 326,000.71 130



# Dashboard: Sales Overview



# Dashboard: Tracking and Priorities

### Key Deal Stock this month

Key Deal Stock \$10k +

OPPORTUNITY OWNER: MAN...	SUM OF AMOUNT	RECORD COUNT
Barry Kellett	264K	9
Richard Chambers	210K	8
Bobby O'Leary	196K	11
Michael McGrath	180K	3
Keith McCabe	173K	5
Wouter Siebelink	152K	7
Julian Murray	128K	8
Russell Daley	103K	6
Marc Somsen	97K	5
Tiffany Landgraff	72K	4
Edward Booth	68K	3
Áine Corcoran	42K	3
Deirdre Ní Dheá	31K	2
Christiaan Koene	30K	2
	11K	1
<b>Total</b>	<b>USD 1.8M</b>	

[View Report](#)

### Key Deal Stock This QTR

Key Deal (\$10k) Stock This QTR

OPPORTUNITY OWNER: MAN...	SUM OF AMOUNT
Bobby O'Leary	859K
Barry Kellett	810K
Richard Chambers	783K
Wouter Siebelink	717K
Russell Daley	669K
Michael McGrath	634K
Julian Murray	605K
Keith McCabe	491K
Marc Somsen	464K
Edward Booth	431K
Christiaan Koene	342K
Deirdre Ní Dheá	331K
Tiffany Landgraff	238K
Áine Corcoran	171K
	25K
Deirdre Purcell	24K
Vincent O'Beirne	22K
<b>Total</b>	<b>USD 7.6M</b>

[View Report](#)

### Closed This Month

Closed This Month (USD)

### UK SMB Whiteboard

Key deals Open this month \$5k+

12:00 PM 1 hr

Lunch

Later Today [More](#)

12:15 PM Q1 SE Quarterly Meeting - Leb...

2:00 PM Demo Skills / SDO

2:00 PM License to Sell - SDO Creation ...

2:00 PM MMC Team Meeting

My Recent Records [More](#)

- My Dashboard
- Sales Operations Management

Stuck & Stale  
Oppty Stuck in Stage >60days

OPPORTUNITY OWNER	SUM OF AMOUNT
Ian Ayling	1.7M
Martin Golding	1.0M
Micheal McHugh	950K
Gill McCabe	898K
Stuart Prince	669K
Eoin Greaves	371K
Paul Johnston	265K
Daryl Brack	235K

Stale Opportunities (age > 180 days)

OPPORTUNITY OWNER	RECORD COUNT
Martin Golding	2
Eoin Greaves(MT)	2
Donnacha Murphy	2
Vivian Nguyen(RJ)	1
Susannah Cronin	1
Stuart Prince	1
Sean Killian(RJ)	1

Am I too pushy? (Deals Pushed > 3X)

ACCOUNT OWNER	RECORD COUNT
Ian Ayling	7
Paul Johnston	6
Raj Dev	5
Greg Kerr	5
Susannah Cronin	3
Stuart Prince	3
Lee Heather	3

Groundhog Day (Top 15 Deals by Push #)

OPPORTUNITY NAME	SUM OF PUSH COUNTER
------------------	---------------------

Reality Check  
Closing in 60 Days w/o Activity In 15

OPPORTUNITY OWNER: MANAGER	RECORD COUNT
Richard Jones-Penny	15
Mark Thorniley	11
Keith Bourne	11

Closing this Month w/o Activity Last 7

OPPORTUNITY OWNER	RECORD COUNT
Stuart Prince	2
Paul Johnston(KB)	2
Susannah Cronin	1
Robert Reynolds	1
Raj Dev	1

Accounts w/No Activity in Last 60 Days

ACCOUNT OWNER	RECORD COUNT
Lee Heather	3
Susannah Cronin	2
Paul Johnston	2

Opptys w/o Competitor Status

OPPORTUNITY OWNER	RECORD COUNT
Paul Johnston	13
Ian Ayling	12
Raj Dev	11
Robert Reynolds	9
David O'Donovan	9
Daryl Brack	9
Sean Killian	8

Missing Pieces  
Opps >\$10K without "Next Steps"

OPPORTUNITY OWNER
Stuart Prince
Donnacha Murphy
Micheal McHugh

Opps w/o Exec >\$50K

ACCOUNT OWNER
Micheal McHugh
Paul Johnston
Niall Hughes
Chris Roberts
Raj Dev
Martin Golding
Keith Bourne

Opps w/o Partner >\$50K

ACCOUNT OWNER
Micheal McHugh
Paul Johnston
Martin Golding
Keith Bourne
Chris Roberts
Susannah Cronin
Stuart Prince

Opptys w/o Primary Competitor

OPPORTUNITY OWNER
Paul Johnston
Ian Ayling
Stuart Prince
Sean Killian
Raj Dev
Micheal McHugh

Salesforce Customer Retention process



Salesforce as a Start-up



Processes to Drive Growth



**Salesforce Customer Retention process**

# Revenue vs. Attrition

Why are renewals important?



# Law of Churn

Selling to stand still

- 90% Renewal Rate
- 85% Renewal Rate
- 80% Renewal Rate

\$1m  
Revenue



Year 0

Year 1

Year 2

Year 3

Year 4



# The story so far...

What challenges did we face, how did we overcome them?

- Working as a **team** for customer success
- Gaining **insight** into a global business
- Leveraging **data** to mitigate risk
- **Getting ahead** of the renewal
- **Forecast** accuracy
- Innovation, **efficiencies and scale**



# A Lifecycle Approach: The Customer Journey

Successful customers = Successful renewals



# A Lifecycle Approach: The Renewal Journey

Renewals begin at Day 1



Renew



Negotiate  
& Close



Insight



Collaboration

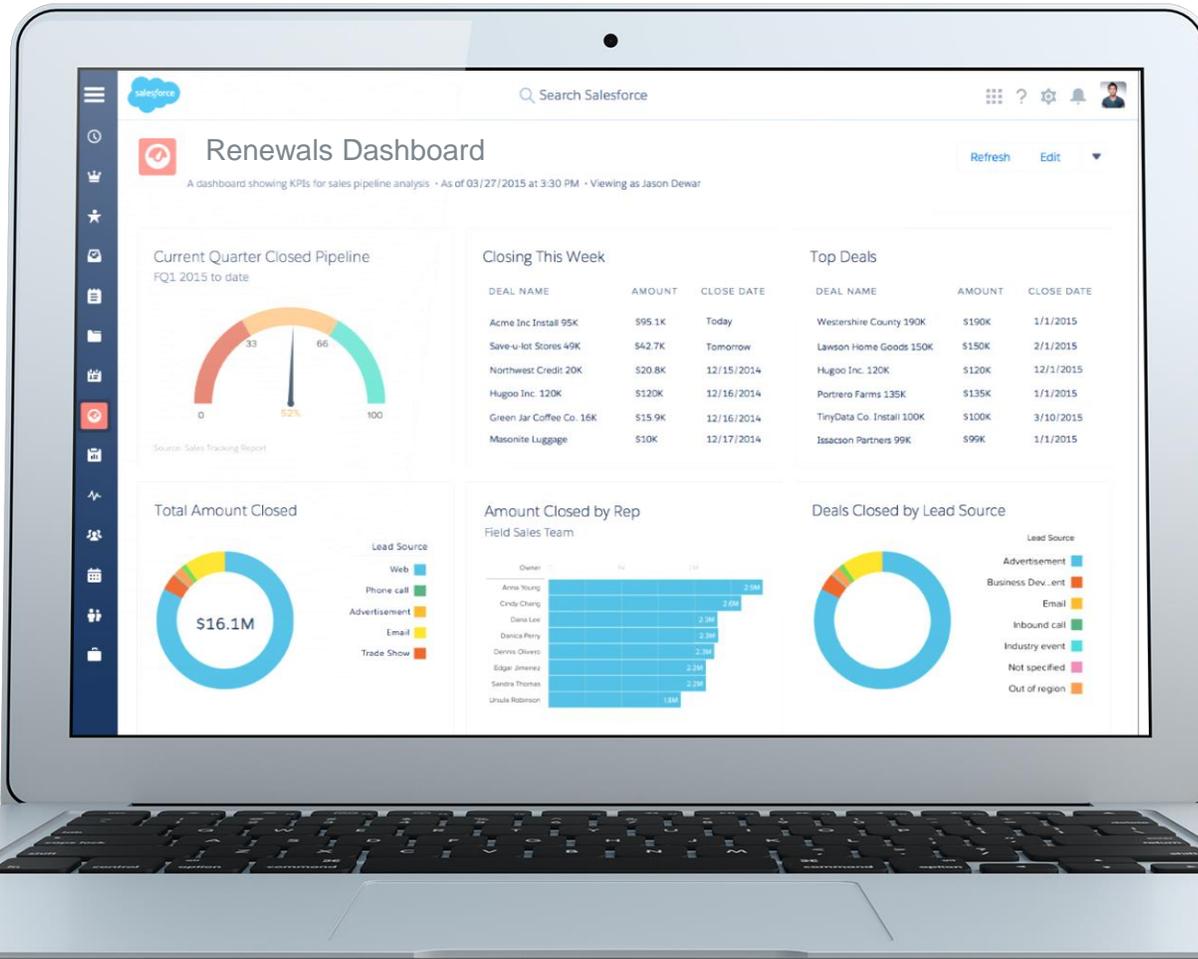


Engagement



# Supported by analytics

One source of truth



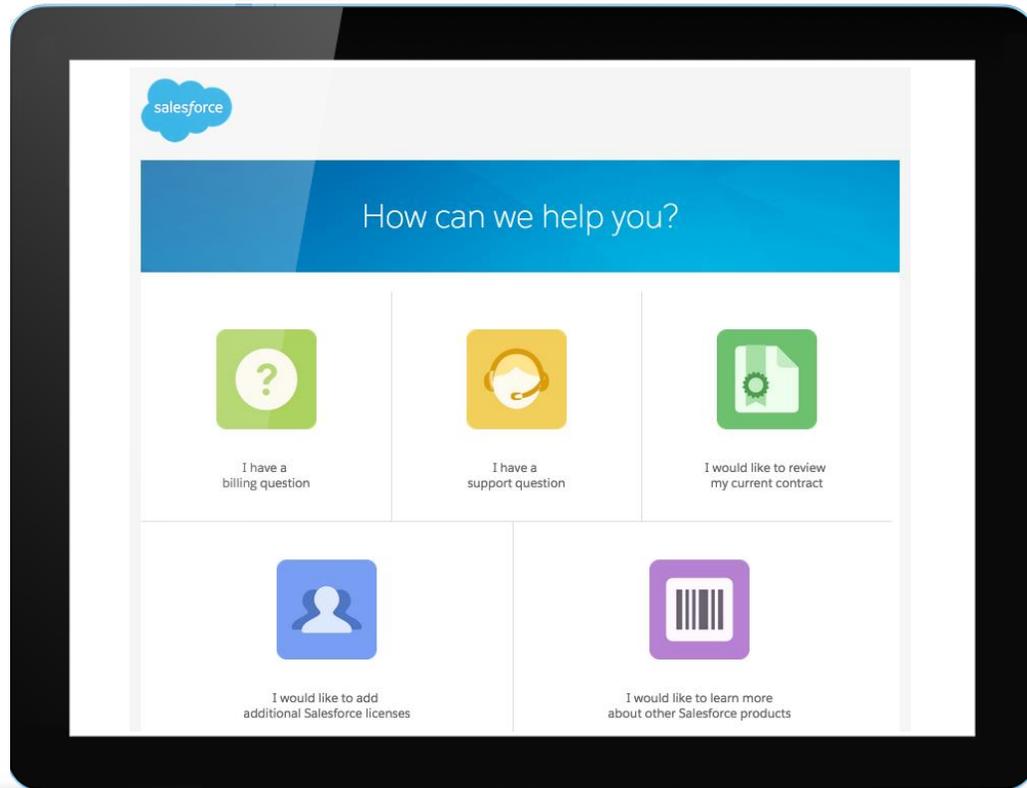
- Real time updates
- Measurement and tracking
- Manage the business from the renewal rep level up to senior management
- **New** – Wave Analytics

# Productivity gains through automation

Leveraging the power of marketing cloud



Marketing Cloud



- **Efficiency** - Automated Email notifications at 90-60-45 days prior to the renewal
- **Personalization** - Tailor email templates with specific opportunity details
- **Measurement** - email activity, open rate, clicks, bounce-backs
- **Event Triggered** – email open time stamp recorded in Renewal opportunity record

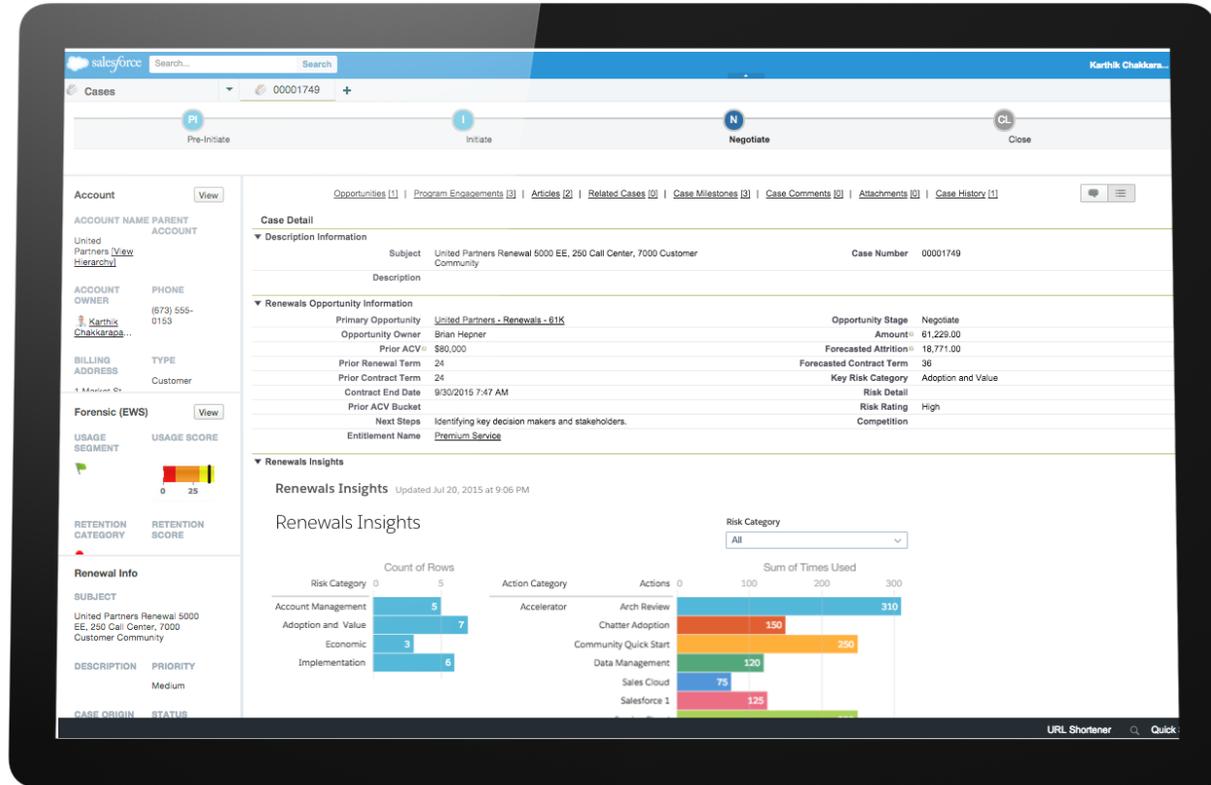


# Unified Renewal Experience

Renewals 'Console' leveraging the Service Cloud



Service Cloud



Renewal milestones workflow

Proactive alerts

Prescriptive insights

Data driven analysis



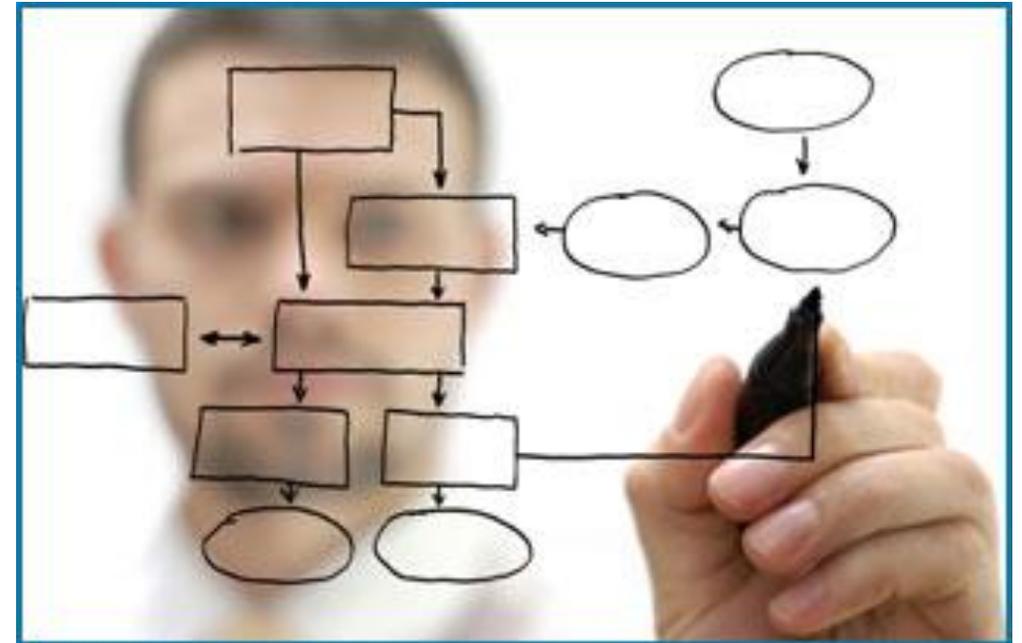
# Future - Improving the customer renewal experience

Taking the right action at the right time

FORWARD LOOKING

EVENT DRIVEN

PRESCRIPTIVE



# Key Takeaways



- Customer Success – MOST important metric
- Everyone owns customer success
- Understand Risk and take action
- Unified experience that starts on Day 1
- Define what impact your product/service has with your customer and monetize (ROI)

thank you

