

Zero-In 2024 worksheet

Objective: As customer success leaders at CloudLink, you are responsible for improving overall customer success outcomes through education.

Company: CloudLink

Team name: _____

Step 1: Choose your focus area (5 minutes)

Which challenge are you prioritizing for Q1? (Circle one)

1. Improving product adoption
2. Creating a new revenue stream
3. Reducing support tickets
4. Onboarding new customers
5. Upselling new products or services

Why did you choose this focus area?

Explain the reasoning behind your decision (e.g., current customer behaviors, business

impact, pain points).

Step 2: Define your strategy (10 minutes)

What is your high-level approach to solving this challenge?

Summarize your strategy (e.g., target audience, key initiatives, education tactics).

Who will you need to collaborate with internally?

Identify key internal teams or stakeholders needed to execute your strategy (e.g., Customer Success, Marketing, Product).

Step 3: Designing the education framework (10 minutes)**What will success look like?**

Define your key performance indicators (KPIs) for success (e.g., increase feature adoption rates, reduce support tickets, improve retention, increase revenue from certifications).

Metric #1:

Metric #2:

Metric #3:

What are your specific targets and timeframe?

Set realistic goals for Q1 (e.g., “reduce support tickets by 15% in Q1”).

Target #1:

Target #2:

Step 4: Develop tactics and execution plan (10 minutes)

What are the key tactics and channels you will use to implement your CE strategy?

List the main education tactics (e.g., knowledge base, online university, webinars, video tutorials, certifications, onboarding/training guides) and delivery methods (e.g., email, LMS, in-app messaging).

Tactic #1:

Tactic #2:

Tactic #3:

Additional notes and next steps for your organization

Use this space to capture ideas, action items, or questions for your own CE program.