



CSOps Mastery: Install-base Growth and Preventing Churn



MODERATOR

Charlotte LaViolette

OPENPRISE



J.P. Kelliher

dun & bradstreet



Drea Jordan

armanino

CSOs is like the blind and the elephant: Individual experience is rarely the whole truth

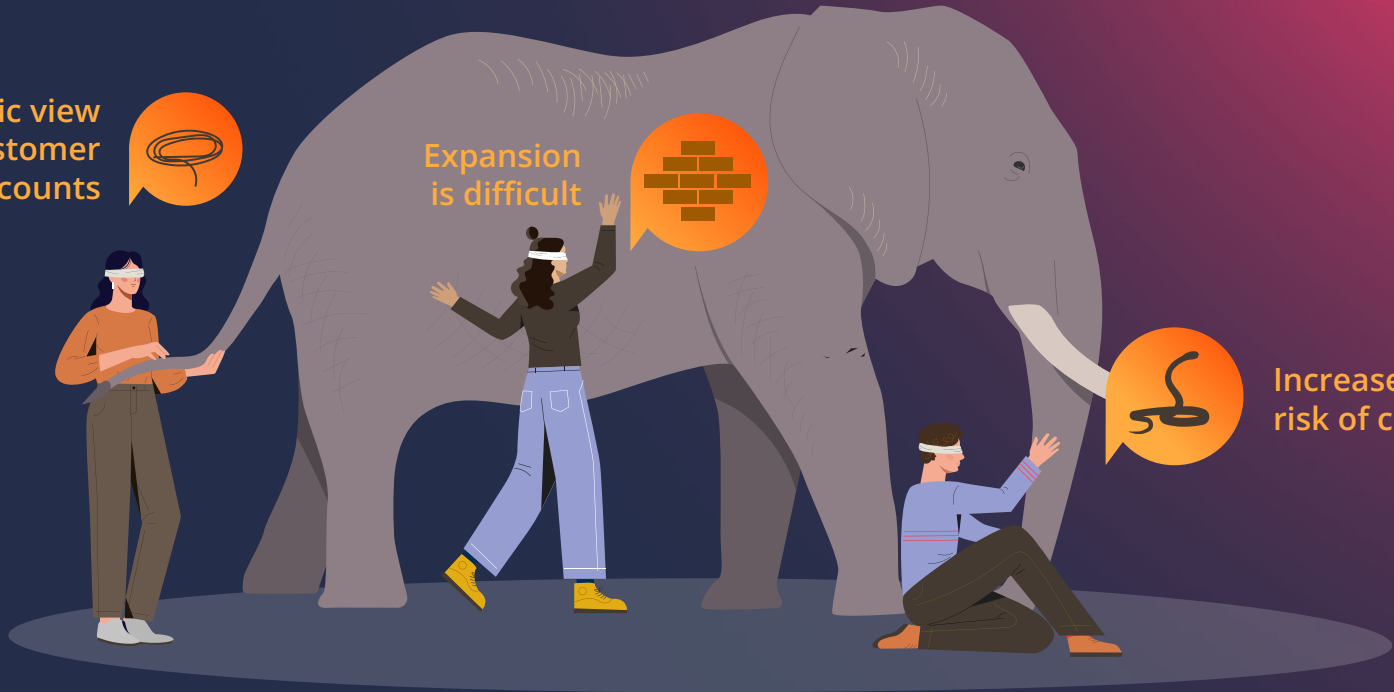
Lack of holistic view
into the customer
accounts



Expansion
is difficult



Increase the
risk of churn



**Let's
all speak
the same
language**



Nomenclature clarification

Clients = Customers

Team = Internal GTM teams

CLC = Crappy Little Customer



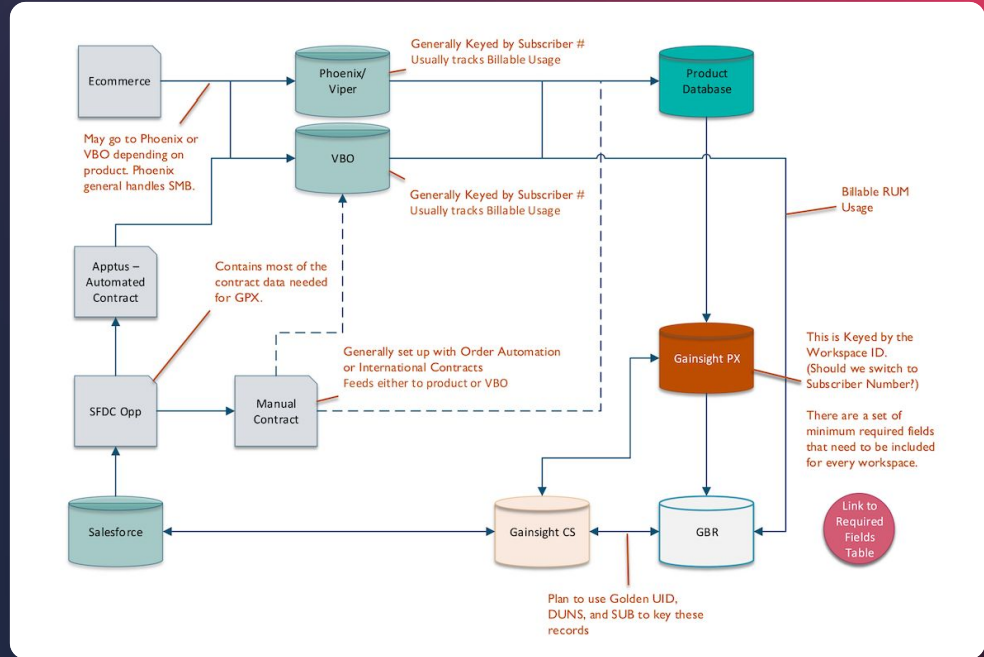
**How did you get
started?**





Un-siloing your data for a 360-view of customers

How did you manage the data silos ?



**How do you identify
the whitespace and
figuring out the CLCs?**



**How do you
encourage/incentivize
people (sales!) to put in
the right/good data?**





**Technologies needed to
bring the data together**

**How do you determine
the right technology to
unify siloed data?**



**When implementing new technology,
how do you bring people and
processes together to ensure smooth
adoption and long-term success?**





**Have a clear and
measurable client journey
with a dynamic growth
plan**

**What are the ingredients
needed to measure
a client's journey?**



**How to do you create
a dynamic growth
plan for clients?**





**If you only
learned
three things
from this
session...**

- 1** Un-siloing your information for a 360-view of the client/customer
- 2** Technologies needed to bring the information together
- 3** Have a clear and measurable client journey with a dynamic growth plan

