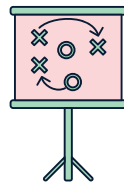


# SaaS Playbook

Managing the subscription lifecycle on  
Salesforce



## STAGE 1: ONBOARDING

A key to success in SaaS is minimizing the length of time between the sale and the customer receiving value from the product. Automating business processes so onboarding seamlessly flows from the sale is essential.

Product-specific project templates provide your onboarding team with a repeatable set of steps, milestones, and target dates.

## STAGE 2: SUPPORT

Case management processes that are transparent and effectively resolve customer issues are table-stakes for SaaS businesses. Route cases to the most available resource with the right skills. Avoid over-servicing with entitlements. Deflect support cases with a self-service knowledge community.



## STAGE 3: CUSTOMER SUCCESS

Ensure that your customer success agents are interacting with their customers on an appropriate frequency. Arm your agents with the data and processes to identify and mitigate risks. Deliver surveys to customers to measure NPS or gather data that informs product development decisions.

## STAGE 4: RENEWAL

Provide your account managers with a 360 degree view of the customer experience: Onboarding issues & successes, product adoption, NPS, defects/support tickets, upsell & cross-sell opportunities. Use segmentation and business rules to make sure that the renewal process kicks off at the right time.

