

SANDLER®

WHITE PAPER

Four Secrets For Customer Success





Four Secrets To A Strong Start For Customer Success

Congratulations, you just got a new account! This good news is exciting, exhilarating, and a bit scary—all at the same time. There could be many reasons why you are now leading the account. Perhaps a colleague retired or took another position, leaving the account available for someone new (you!) to take it over. Whatever the circumstance, it's now up to you to **make the most** of this opportunity to successfully lead and grow an account.

Here's more good news: Sandler's customer success team shares some **best practices** to ensure that the new account relationship launches with a strong start from day one.

You're destined to be a Rockstar account rep with these four secrets for customer satisfaction and success.

SUCCESS SECRET 01

SETTING THE STAGE: THE HANDOFF

Every company has a different process for handing off accounts to new team leaders. When our sales team at Sandler hands off a new account to our customer success team, the first thing we do is schedule an **internal kickoff call** AND an **external kickoff call**.

The **internal kickoff call** provides an opportunity for the sales team to do a “**data dump**” on everything they know about the client. Don't hesitate to ask lots of questions about the account history, how communications were handled, and issues that made this customer satisfied/unsatisfied with your company's products or services. The answers to your questions will help you be better prepared for the external kickoff call.

The **external kickoff** call should include everyone who will touch the account at your company and everyone on the customer's team who will interact with your company. As the account lead, you will run the call and introduce everyone on the call from your company. A few tips for this very important call:

1 Think like the client

Remember that clients sometimes feel a bit abandoned when they know their account is being taken over by someone new. Put yourself in their place, and let that perspective guide your efforts to **reassure** them that everything is under control and in good hands under your leadership.

2 Do your research

Make sure you know the **names, titles, and roles** of everyone on the call from the customer's team. Check their LinkedIn profiles to gather intel on their areas of expertise.

3 Be prepared

Know what you want to **accomplish** on the call and work toward that goal. Remember that the customer wants to know how communications work at your company and how they would address any concerns that might come up.

4 Schedule an internal pre-call

This call should include everyone at your company who will be involved with the customer's account. On this call, let them know what is **expected** of them on the external kickoff call when they are asked to speak.

5 Create an agenda

This doesn't have to be fancy. It can be a **bullet-point list** of the topics to be covered on the call. The main purpose is to demonstrate to customers that you will run their account in a highly organized fashion.



SUCCESS SECRET 02

MEETING OF THE MINDS: THE SERVICE LEVEL AGREEMENT

The **Service Level Agreement (SLA)** is a written contract that spells out the expectations for how your company and your customer will work together. This gets everyone on the same page and ensures a **quality customer experience**. It's about meeting the expectations of the client at the beginning and getting their feedback on how to succeed with them.

Note: The term "SLA" is used at Sandler, but your company may want to use a different name for this document.

Below are some elements that would be helpful to include in the SLA:

1 Routine communications

This provides details about the **day-to-day communications** process between your company and the customer. What is the chain of command? How quickly is either party expected to respond to phone calls, emails, or texts? What is the expectation on turnaround time on materials for review, such as press releases, layouts, campaign strategies, etc.?

2 Crisis communications

We all know it can happen. Sometimes things don't go as planned and someone drops the ball, which can result in dissatisfaction on the part of the customer or hurt feelings on the part of a team member at your company. If you have a written process in place for addressing a problem quickly, you can be proactive about resolving the issue in a professional manner, and projects can get back on track. The SLA gives both parties a **road map** to follow as soon as a problem arises, long before anyone starts to play the blame game.

Our customer success pros shared a few more tips for successful account relationships when creating an SLA-type document:

- Create an environment where the client feels **comfortable** expressing disappointment in your company; most problems can be remedied if they are addressed early on.
- Your company is **equal** in stature to your customer. While you want to provide exceptional customer service, you are a professional and not subservient to the client.
- Don't be afraid of conflict. You need to be willing to **negotiate** with the client, which can lead to stronger mutual trust and respect.
- **YOU** are the key to helping customers navigate how to work with your organization, so know how your company works and have a strong sense of your business.



SUCCESS SECRET 03

MEASURING SATISFACTION: 1 THE QUARTERLY REVIEW

At Sandler, we don't leave customer satisfaction to chance—and you shouldn't either. Our customer success team meets every 90 days with the customer to review three to five projects that were designated as top priorities for the previous 90-day period.

The **quarterly review** provides an ideal opportunity to **engage** in candid conversation and discussion about all aspects of the deliverables that your company is tasked to perform for the customer. This collaborative approach makes everyone feel involved and engaged in achieving a successful outcome. Your goal is to gauge the satisfaction level of your customer so you can work with your internal teams to meet or exceed that level going forward.

To guide your conversation in the quarterly review, a helpful tool to measure customer satisfaction is easy to create and adapt as needed for your customers.

In advance of the scheduled quarterly review, send a **list of satisfaction factors** (see below) to your primary points of contact at the customer's company and ask them to choose five factors based on the prioritized projects that your company handled in the previous 90 days. Ask them to give their selected satisfaction factors a weight scale of 1-5, with **1** being a factor that's **"Nice to have"** and 5 being a factor that's **"Critical."** Let them know that these factors and weights will be discussed in depth during the quarterly review because customer satisfaction is such an important measure of success.

As you discuss the ratings during the quarterly review, agree upon a rating for each of the satisfaction factors based the following descriptors: **1=Corrective Action Needed; 2=Improvement Needed; 3=Acceptable; 4=Good; 5=Excellent.**

Multiply the **weight** number by the **rating** number to get the **satisfaction** number for the factors that were discussed in the quarterly review. This will point out any areas where both parties are excelling or need some extra attention.

Some common satisfaction factors are shown below; you can add others based on the nature of your business relationships with customers:

- How well does our company understand your challenges and goals?
- Were our company's programs and materials effective?
- Did our company provide skills enhancement and offer continuous knowledge improvement?
- Did the communication flow smoothly, thoroughly, and accurately?
- Did our company complete your projects and requests in a timely manner?
- Was our company proactive in anticipating your company's needs?
- Does our company effectively transfer knowledge and materials?
- Did our company achieve positive results on the prioritized projects?
- Did your company receive a high quality of performance from the account team?
- Was our company creative and adaptable with regard to your prioritized projects?
- Do our companies have clarity on the upcoming projects to prioritize and the goals for them?

Before the quarterly review concludes, decide on the top **three to five projects** to **prioritize** for the next 90 days. This process sets your company up for success and holds the customer accountable as well.

There's tremendous **value** in this client-centric dialogue about customer satisfaction, and it strengthens the bonds that might lead to expanding the relationship in the future (see next section).

Final note: Be sure to share the metrics of customer satisfaction with the senior-level execs at the customer's company. This proves that they are getting an excellent **ROI** from their investment in your company, especially when it's time to renew your contract with them.

SUCCESS SECRET 04

GROWING THE BUSINESS: THE STICKY FACTOR

You've heard the adage that satisfied customers are the best advertisement. **It's true!** Not only can they refer you to other businesses in the market for your company's services, but they can play an instrumental role in helping to grow and expand the account relationship within their own company.

In short, the best way to expand is to build on the customer base that you have already established.

You want to increase the **Sticky Factor**, meaning that your customer is more attached to you than ever because new teams/groups/divisions at the customer's business are purchasing programs and services beyond the first team that initiated the relationship with your company.

The customer success professionals at Sandler are experts at deepening our involvement with companies that may have started in only one area. Here are some of their tried-and-true insights:

- Don't be afraid to ask your current customers if there's anyone else in the company that you should be talking to about your awesome products and services.
- There's a big difference between being a **champion** of your products and being a **user** of them. Champions love your products and your company (and you!), and they are often more than willing to provide the names of others who would benefit from your offerings.
- Our account teams meet **regularly** to discuss the status of an account. The ultimate goal is to get deeper and wider with the client, so the relationship is stronger and more intertwined.
- Sandler assigns a **KARE** status to all accounts—**Keep, Attain, Recapture, Expand**. Try something similar with your customers, and you'll quickly become aware of the accounts that have the most potential for expansion.
- If you keep customers happy and satisfied, they'll want more of your product. As your company becomes more and more sticky, this **reduces** the churn of acquiring and losing accounts.

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To learn how to build an effective program to achieve real customer success.



About Sandler

Sandler is the worldwide leader in sales, management, and customer service training. We partner with organizations of all sizes, across all industries, to help them improve their revenue performance. Sandler not only provides the initial and advanced strategies and tactics needed to excel, but we also empower your team to develop the attitudes and implement the behavior necessary to reach the highest levels of success.

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