

# 4 Playbooks

THAT ARE KEY TO SCALING  
YOUR **B2B SAAS** BUSINESS



INTRODUCTION

KEY PLAYBOOKS

CREATING MOTION

WHAT'S NEXT?



## CONGRATULATIONS!

As a **scaling** B2B SaaS business on a **super charged growth trajectory**, you know that implementing playbooks is the best way to standardize your customer's experience, and your business' operations.

A playbook is a set of activities that kick off when a certain event occurs. Running set motions based on specific situations provides your customers with a consistent experience. Playbooks can also improve your employee onboarding and training by providing necessary guidance.

In this ebook, we identify four of the most important playbooks your business can implement.

## DON'T TAKE RENEWALS FOR GRANTED

Signing up a new customer is one of the most celebrated parts of growing a SaaS business. While most companies invest heavily in the sales and marketing motions to gain a new customer, they often take the renewal process for granted. Implement this **renewal playbook** 90 days in advance of your customer's annual renewal to ensure the most successful result.

- 90 days** Send NPS survey to gauge temperature
- 85 days** Research customer's onboarding experience and help desk tickets
- 80 days** Look into invoice and payment status to ensure everything is up to date
- 75 days** Research product usage stats
- 70 days** Send customer a 'year in review' email incorporating their usage and any information about new releases
- 65 days** Setup meeting with customer to review renewal information
- 61 days** Double check renewal invoice. Make sure any contracted price changes, and recent license additions have been included.
- 60 days** Send renewal invoice
- 30 days** Check on status of renewal payment

## WHAT TO DO IF A CUSTOMER IS AT-RISK

A customer can signal dissatisfaction in a variety of ways. A poor online review, delayed invoice payments, decreased usage, or a detractor response to an NPS survey. Whatever the signal you receive, your team needs to take immediate action. Here is a sure fire way to manage a tricky situation.

- Step 1** You receive a signal, immediately call and email the customer setting up a meeting time.
- Step 2** Research the customer's recent help desk and onboarding experience.
- Step 3** Identify any business changes at the customer.
- Step 4** Research Product Usage Stats.
- Step 5** Do a LinkedIn search to look for recent management changes.
- Step 6** Prepare a Call Plan, anticipate issues and questions.
- Step 7** Conduct the Call, ask this question: "What can we do for you today that would improve your experience?". Be prepared to Listen. Schedule a check-in.
- Step 8** Followup. Do not drop a single ball. Over deliver on every item.

## PLAY TO WIN

For many SaaS companies, competition is fierce. But the playbook to beat that tough competitor is repeatable. The challenge is getting that knowledge across your entire sales team. This is the perfect application for a playbook. Here are key steps that should be considered in a competitive playbook.

- Step 1** Review Competitor Battlecard
- Step 2** Review Win/Loss. Which deals did you win and lose against this competitor. Talk to your colleagues who drove those deals.
- Step 3** Validate Votes. Whose vote do you have? What is their level of influence?
- Step 4** What are your relative weaknesses? Did you position against them?
- Step 5** Communicate strengths. Did you plant questions with your buyer to draw out your competitor's weaknesses?
- Step 6** With your buyer's permission, send a list of questions they should ask your competitor.
- Step 7** Provide case studies and other customer evidence that supports your strengths.
- Step 8** Provide an option to talk to a customer who evaluated the competitor.

## START OFF ON THE RIGHT FOOT

Your new customer's onboarding experience sets the relationship tone more than you can imagine. Make sure you over communicate what happens next. You don't want to create a communication vacuum the moment they make the commitment to move forward. This playbook provides an idea of the activities that should be scheduled once a new customer signs on:

- Step 1** Kick off the provisioning process. Setup their environment, and any other systems like portal access.
- Step 2** Send a welcome kit that could include checklists to help the customer get ready for onboarding, as well as an introduction to the various people at your company that they will be working with.
- Step 3** Setup an internal sales to service handoff. Transfer all call notes, and review agreements, SOW, business drivers, new reality, and key contacts.
- Step 4** Schedule onboarding meeting with the customer. Make sure the sales rep is present in that meeting.
- Step 5** Two weeks following the welcome kit, have your CEO call the executive sponsor welcoming them to the family, and establishing a path to escalate any issues.

## TURN PLAYS INTO MOTION

Once you incorporate these plays into your business, it's time to make sure they are being followed. **Now how do you do that?**

### **Create Activities Automatically**

Automate and assign playbook activities as a byproduct of your business operations. Software tools like TekStack can instigate playbooks at the click of a button, or set them off from a workflow.

### **Ensure that Individuals are Completing Tasks**

Now that activities are created and assigned, make sure the work is being done. Use activity reporting to identify tasks that are overdue. Track activities at the customer or opportunity level. This is a key element to making sure playbooks work.

### **Track your Progress**

Establish targets for key metrics like renewal rates, customer NPS, and win rates. Track your progress against these goals to see if playbooks are improving your success. Communicate these metrics to your team. Provide insights and anecdotes. Everyone loves a story!

## ABOUT TEKSTACK

**TekStack** will supercharge your growth. Be board-ready every single day, not just one day out of 90. We give you everything your SaaS business needs to operate from a single pane of glass. A 360 degree view of your customer and your business.

**Contact us,** lets talk about how we can help you crush your goals.

[www.tekstack.com](http://www.tekstack.com)