

# 23-TAM QBR NPS-CSAT Survey

# Objectives

- We want to capture sentiment to quantify the level of satisfaction (CSAT) with existing TAM customers
- We want to gain insights into their experience through open feedback
- We will identify opportunities for us to improve our TAM services
- We want to capture indicators of their likelihood to renew TAM Services
- We want to reaffirm their trust in our commitment to their success by closing the loop with each customer response

# Goals

- 90% coverage of all accounts who complete a QBR engagement or Quarterly Check In
- 75% response rate from all surveys sent
- Close the loop 100% of the time

# Strategy

- Ensure a friction-free way for TAMs to send the survey (FUTURE)
- Send surveys using our survey platform, GetFeedback
  - Track CSAT as a real-time score on the contact record
- Create dashboards in both GetFeedback and Salesforce (if available) for real-time visibility
- Create alert for completed surveys to all TAM and Service leaders
  - Export responses weekly to key stakeholders to action follow up
- Execute consistent close loop process
- Create follow up session/next step and share with customers who respond
  - Led by TAM leadership

# Timeline

NOV 2022

## Program Design

Design survey strategy. Review with all stakeholders involved; commit to close-loop process and RACI

FEB 2023

## Survey Live

Survey sends begin to QBR participants.

JUN 2023

## Move Forward

Reflect 1H findings, look to automate distribution and recommendations are actioned in internal processes, external requests for future programming.

DEC 2022

## Program Launch Ready

All systems ready to execute, including reporting. Education to and enablement of identified RACI groups complete.

APR 2023

## Report and Roadshow

Present summary findings and recommendations to all stakeholders and leadership groups. Demonstrate close-loop outputs externally.

# RACI (responsible, accountable, consulted, and informed)

	Customer Marketing	TAM	Customer Success	Support	Product Management	Sales	Exec Leadership
Survey Strategy	R, A	A	C	C	I	I	I
Survey Design	R	A	C	C	I	I	I
Internal Communication	R	A	I	I	I	I	I
Survey Deployment	R, A	C	I	I	I	I	I
Closed Loop Process	A	R, A	C	C	C	I	I
Reporting and Analysis	R	A	I	I	I	I	I

# Audiences

# We will send our survey to engaged customers at every level



## Administrators

Daily, weekly, or monthly users who are responsible for the ongoing maintenance of OwnBackup



## Developers/Architects

Builders using OwnBackup to design and deploy solutions for their business



## C-Level

Customer Executive Teams (~100 total contacts)



## COEs

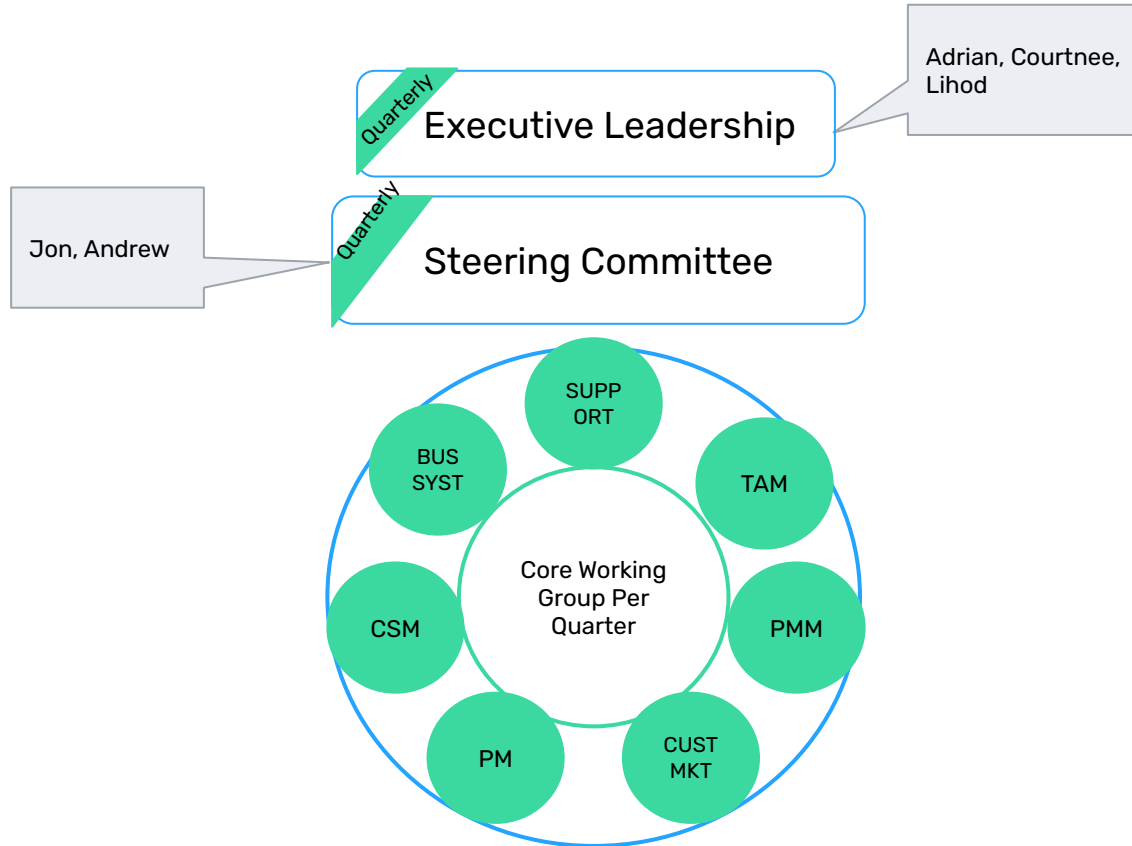
Members of centres of excellence across our install base.



## Advocates

Engage with existing and/or identifying new advocates for additional programs and outputs

# Our Internal Stakeholders





# Closing the loop

# Internal Comms by Audience

## Executive Leadership

- Leverage existing TAM meeting for pre-launch sign off and post survey findings
- Post meeting email with appropriate links
- Weekly dashboard sharing via TAM Leader Slack channel
- Owner: Jon Pfeiffer

## Steering Committee

- Bi-weekly touchpoint through pre and post survey deliverables
- Real-time dashboard access, close-loop tracking
- Slack channel for real-time communication
- Owner: Jon Pfeiffer

## Working Group + Teams

- Monthly sync on status
- Real-time dashboard access
- Slack channel for real-time communication
- Close-loop tracking, awareness and actions
- Owner: Tracy

## All Internal

- Weekly readout of TAM Survey results
- Quarterly operations meeting
- Sales and Marketing meeting (as needed)
- Sam's Weekly Update (as needed)
- Owner: Jon & Andrew

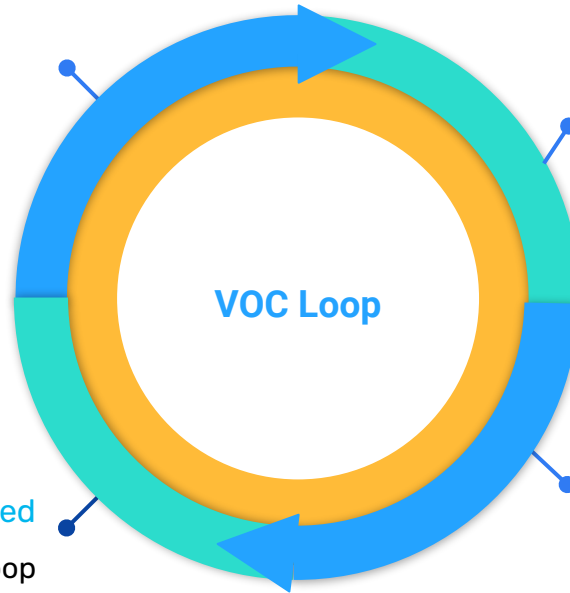
# We want to close the loop, internally and externally

Share feedback company-wide and with our customers including but not limited to

- Newsletter
- Webinar(?)
- Working group
- Slack Channels
- Town halls
- Weekly team meetings involved in resolution
- Dashboards

Action Plan based on feedback received

- If a **detractor** or **neutral**, follow close loop flow and plan next steps.
  - If **promoter** or **satisfied**, share company-wide, activate advocacy flow via Slack (General?), Sales and Marketing call, and summary email.



Customer sent survey with GetFeedback based on following criteria

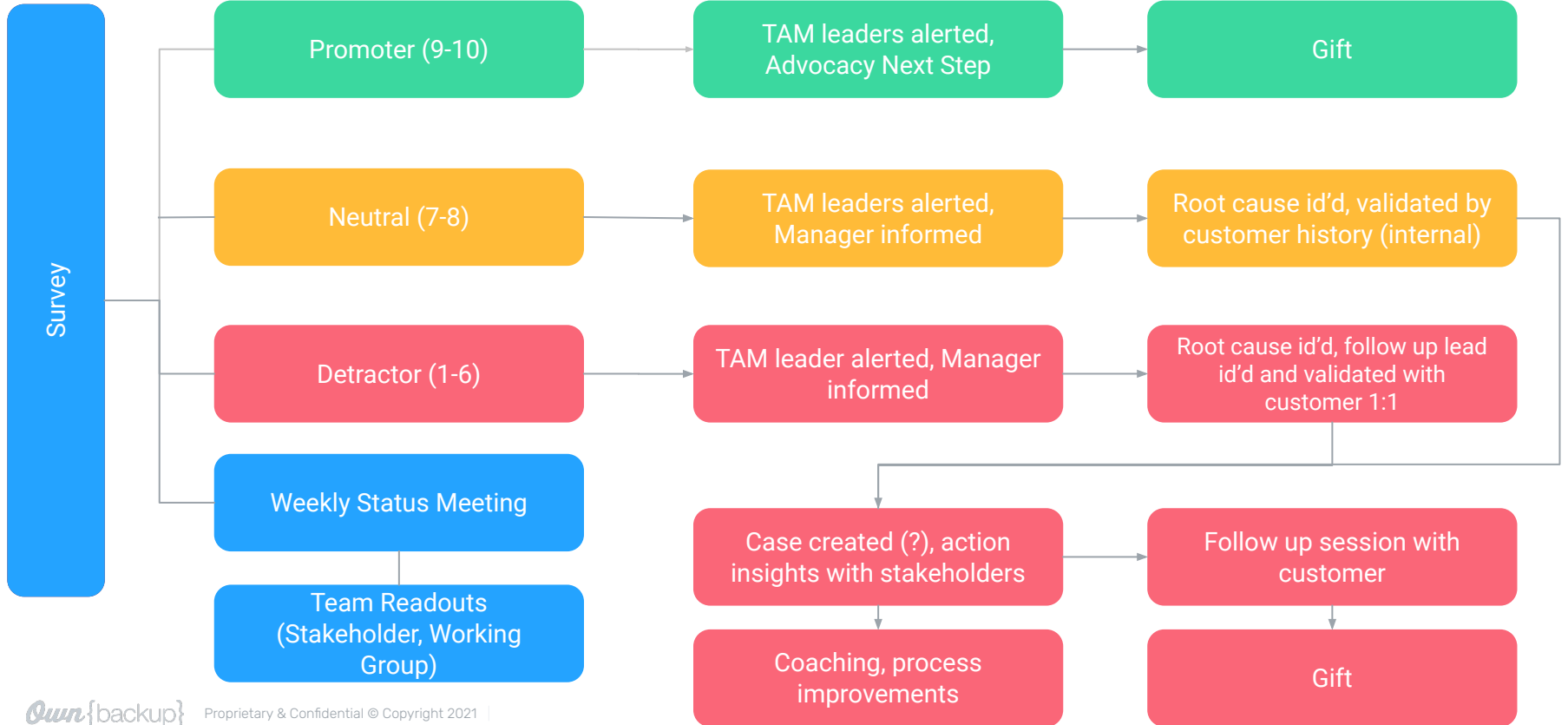
- Existing customer who completes QBR with TAM engaged
- Quarterly email sent to Key Accounts (TBD)

Customer shares feedback

Collected by Survey Platform

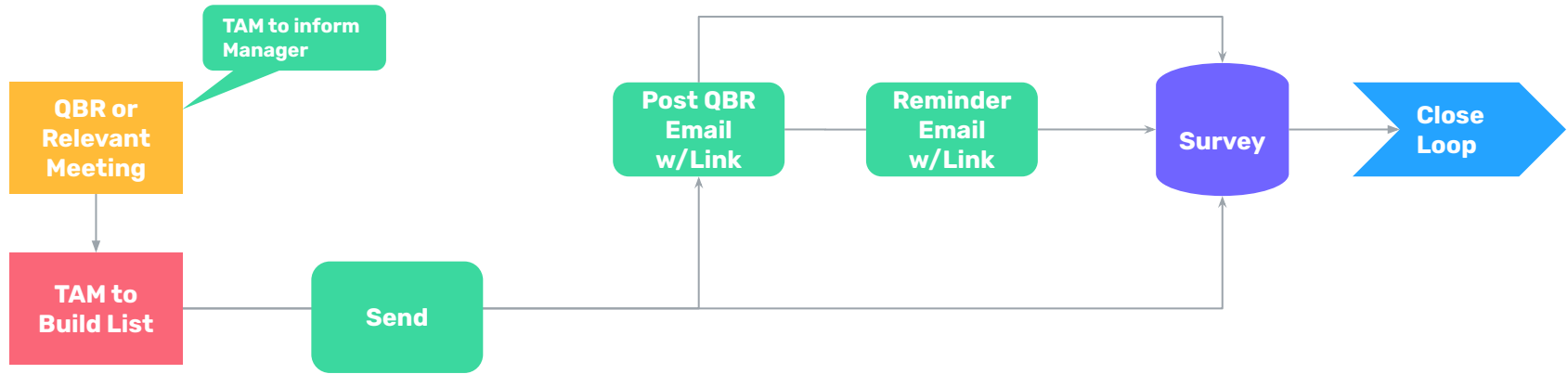
- Results synced to Salesforce
- Automatic alerts sent to activate closed loop (via GetFeedback)
- Captured and distributed via process above (Slack, future)

# Close Loop Flow



# TAM Workflow

# This is how we'll get our survey sent today



# GetFeedback Email Send

Subject: Help us improve with your feedback

I want to thank you and your team for participating in our latest business review - your time is important and we want to ensure you are receiving value at every step with OwnBackup.

Please take 3 minutes to share your valuable insights with us. Our team takes your feedback seriously and wants to make sure every one of our customers has the resources they need to be successful.

With thanks,  
Andrew

Andrew Hart  
Vice President, Services  
OwnBackup

# GetFeedback Follow Up Template

Subject: Share your feedback with us

Hello <First Name>,

I wanted to follow up and see if you had 2 minutes to share your valuable insights with us. OwnBackup takes your feedback seriously and wants to make sure every one of our customers has the resources they need to be successful.

[Here is a link to our survey](#) - your feedback means a lot and we look forward to improving your experience with us.

Chat soon,

Andrew



# Resources & Remaining Questions

# Quick Links

1. [Draft Survey](#) (do not ship externally, results will not be captured)
2. [Live Survey](#) (shipping externally will result in anonymous results via this link)
3. GetFeedback
  - a. [Summary Report](#)
  - b. [Dashboard](#)
4. Salesforce Report

## Open Questions

1. Are their actions or data changes in Salesforce we can use to automate the email send?
  - a. How do the TAMs manage the QBR engagement operationally?
  - b. Could we use the same service ticket like Onboarding/Go Live so that we can have attached contacts and status?
2. Will the TAMs use Gainsight in the future?

**Thank you**

*Own*{backup}