

Success Plan Canvas

CLIENT

CSM

DATE

VERSION

1 Know Your Client

Company Details

Short history, main products/ services, industry trends, Internal systems/tools used

Key Stakeholders

Which internal/external persons, groups and decision makers should we take into account and are affecting our project.

For complex products it makes sense to create a stakeholder map.

Decisions makers:

Budget owner:

Project team:

Who are the Influencers, Champions, and Detractors?

User groups:

Any Priorities?

Other Highlights?

2 P.I.N.C

Problems.Impacts.Needs.Constraints

Problems

Which problems/challenges does this customer want to solve?

Impacts

What is the impact of those problems on the customer's business?

Needs

Which needs does our customer have related to our product?

Constraints

Which constraints and challenges do we need to overcome or should we be aware of?

3 Products & Services

4 Desired Outcomes

What outcomes is the customer looking for?

What kind of experience does the customer require to achieve this?

How is our product/service helping our customer to achieve their outcomes?

What use cases did they use?

5 Success Criteria

How would success look like for this company? What are the criteria for that?
do we have timeline to achieve the goals?

Which success stories of other clients can you share here?

6 Risk & Opportunities

Think about the threats & risks which could intervene with the success plan and endanger the relation and value of your product.

Which up- and cross-sell potentials do you see?

7 Success Milestones

Which milestones and actions are defined on the road to success?

For every action, add a due date and also a person accountable

Communication & Process

Skills & Education needed



CS:reimagined
Same Tools, New Arrangement

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