



# **Mastering Goal-Setting for Customer Growth**

Kristen Hayer

# Agenda

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***"Setting goals is the first step in turning the invisible into the visible."***

Tony Robbins

- Why Goal-Setting Matters in Customer Success
- Internal Goal-Setting
- Creating Goals with Customers
- Q&A





# CS Metrics Matter

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Organizations with clear goals are 4x more likely to be in the **top quartile of their industry.**

People are 42% more likely to **achieve goals** when they are written down.

Just 16% of frontline employees have a **clear understanding of their company's priorities.**

Managers who **set relevant goals** boost the **percentage of top performers** on their teams from 44% to 60%

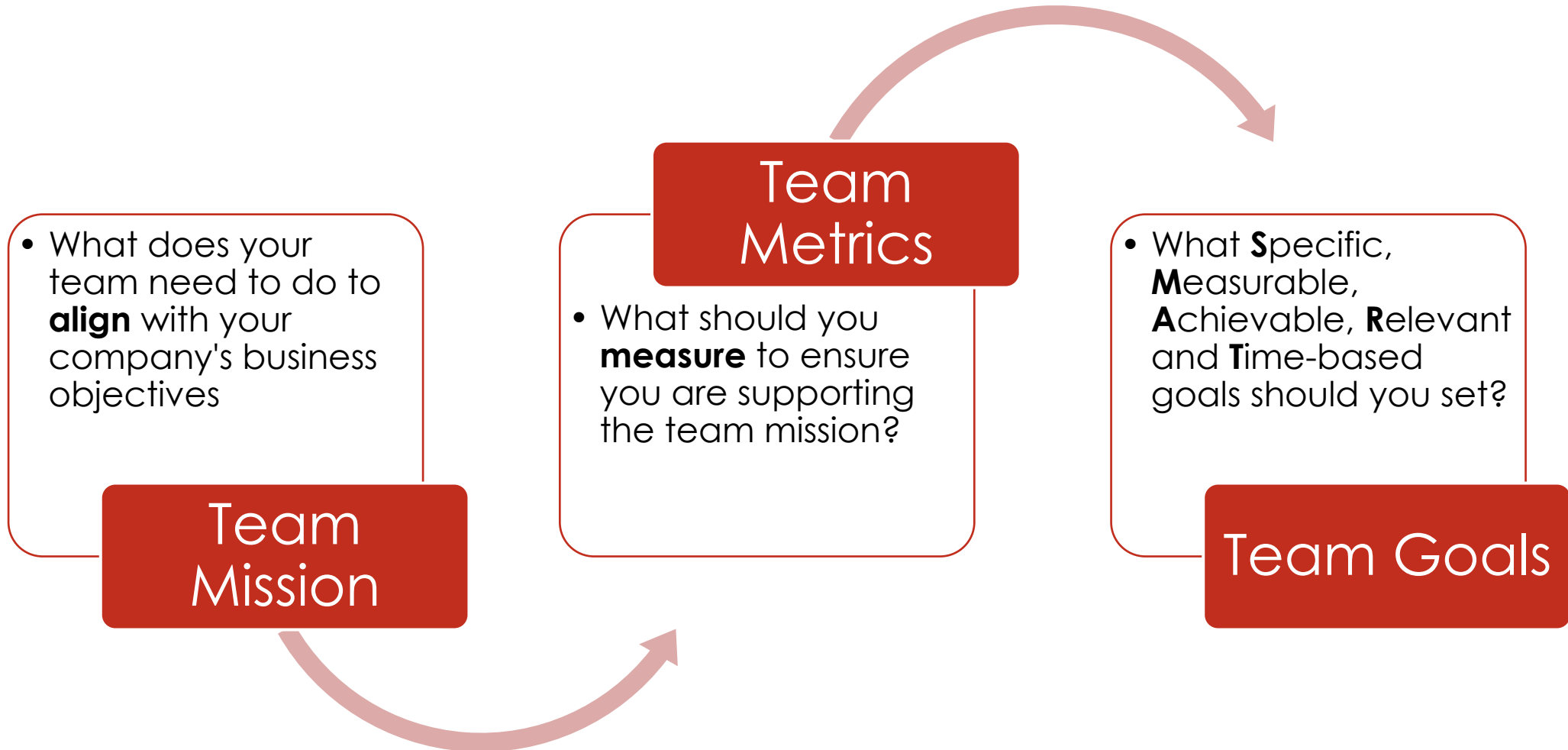




# Internal Goals

- **Customer Success** – revenue retention, expansion, advocacy
- **Onboarding** – time to value, adoption, project efficiency
- **Support** – response time, response accuracy, satisfaction
- **Services** – margin, product usage, project efficiency
- **Account Management** – pipeline, time to close, close ratio

# Outlining Important Team Goals



# Individual Goals

- Break team goals down into **goals for each person**
- Ideally the goals should be **the same for each person** on the team
- Sometimes you might have to **adjust the goals** based on a team member's customer portfolio
- Goals should be based on **results, not effort**

If formal goals are new to your team, you should review the goals thoroughly in your one-on-one meeting to make sure they are clear.





# Levels of Value & Customer Maturity

Tactical, Product Goals

Strategic, Business Goals





# Turning Expectations Into Goals

*"Unless commitment is made,  
there are only promises and  
hopes, but no plans."*

Peter Drucker, Author and  
Management Consultant

**Specific**  
**Measurable**  
**Achievable**  
**Relevant**  
**Time-Bound**

## 1. **Outline Expected Outcomes**

From your conversation with the customer, build a list of 2-5 major expectations

## 2. **Research Baseline Metrics**

Ask questions that help you understand the customer's starting point

## 3. **Review Historical Trends**

Work with the customer to collect data on prior performance (if available)

## 4. **Choose Time Period**

Decide how often it makes sense to measure performance for each goal

## 5. **Write SMART Goals**

# Creating a Goal Plan

<b>Reduce Time to Value</b>	92 Days	<b>Negative</b> – Time to value has increased from 75 Days to 92 Days	<b>Quarterly</b>	<b>Reduce time to value from 92 days back down to 75 days over the course of 2025.</b>
<b>Increase Project Capacity</b>	6 Projects/PM	<b>Positive</b> – Average Projects per PM has increased from 3 last year	<b>Quarterly</b>	<b>Increase project capacity to 7 projects/PM in Q1, evaluate results and then set goals for Q2-Q4.</b>
<b>Improve Company Reputation</b>	CSAT Score 80%	<b>Negative</b> – Survey results declined from 90% last year	<b>Annual</b>	<b>Reduce negative CSAT survey results and increase positive CSAT survey results to end the year at 90%+.</b>



# Q&A + Resources

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## Questions for Kristen

### The Success League

- Accredited CSM Certification
- CS Leadership Training
- On-Demand and Instructor-Led Options
- Corporate CS Training Programs

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