

# The Customer Experience Canvas

Design and run, all-in-one

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Sr. Product Manager  
Totango





## Nate Richardson

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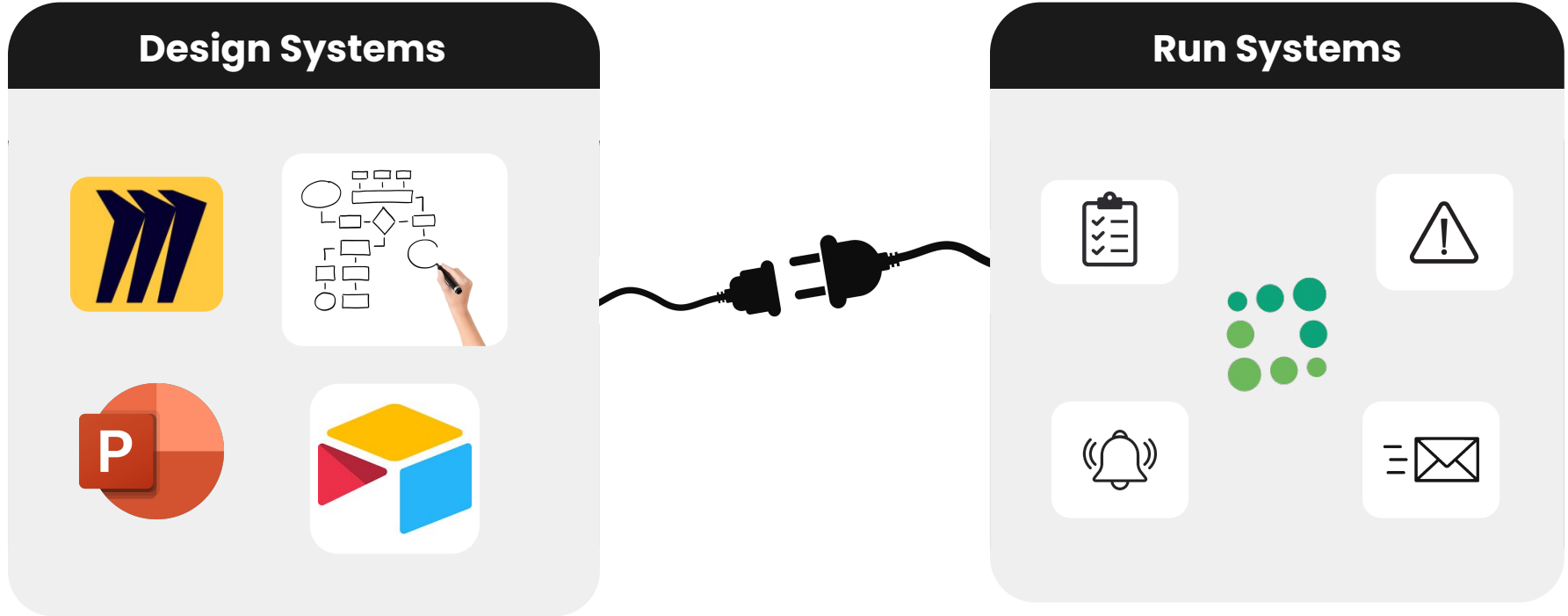


# The Problem:

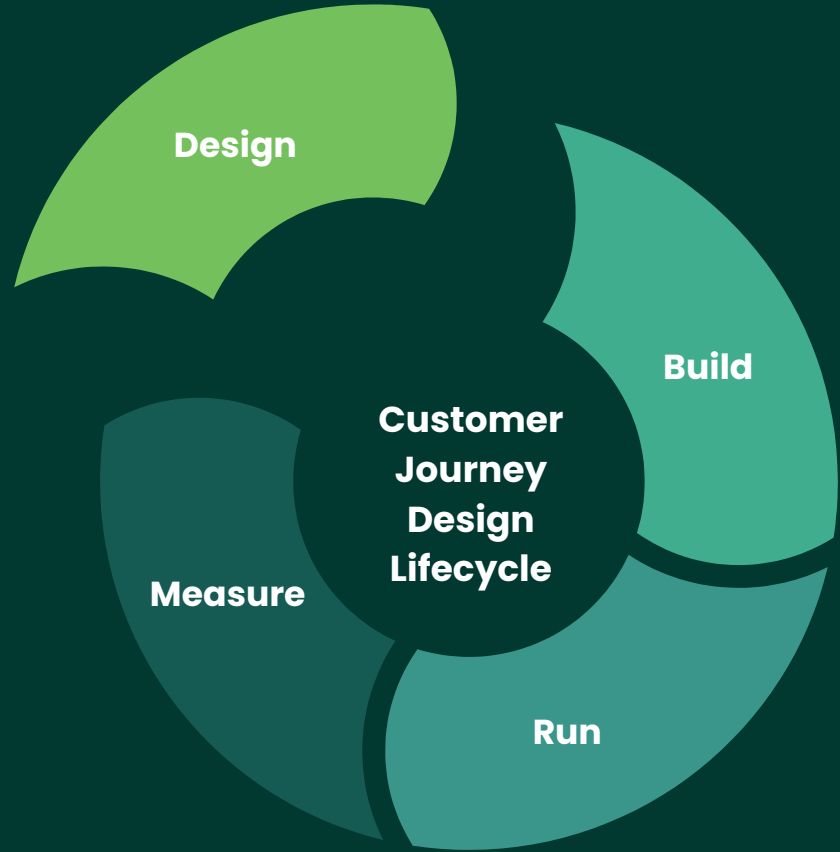
Your journey map needs an upgrade.



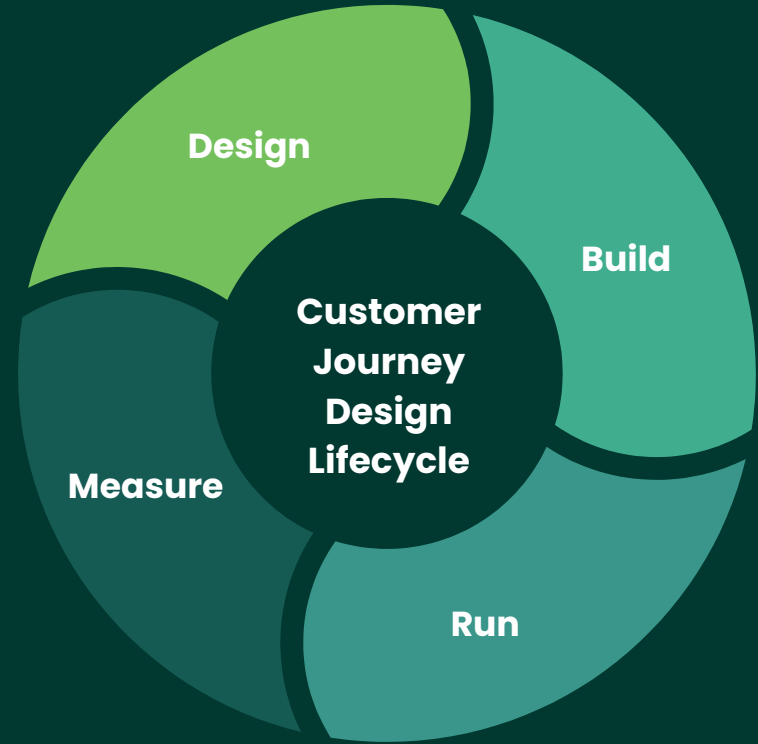
# The Problem



# The Customer Journey Design Lifecycle



# The Customer Journey Design Lifecycle



# Design and Run All-In-One

TOTANGO

Q Search for accounts, users, and more...

UPGRADE

Manage Onboarding Projects Onboarding

Scorecard

Canvas Beta

Segments

Reports

Assets

Success Plays

Campaigns

All Types +

All Statuses +

All Owners

Last updated by Nathaniel Richardson on Mar 9th, 2022

Saved

FEEDBACK

SHARE

Q Search

Kick Off

Sales to CS handover and knowledge transfer

Accounts 2

Request information

Please complete this information form.

Task

Upload Contract

See 1 more

Inactive

New Customer Welcome Email

Users 1

Welcome [Name]!

Hello

This email is sent to new users after they log in for the first time

Ongoing

Start Date: May 18 2021

Draft

Set Customer Journey Stage

Accounts 2

Update Account Attributes

Customer Journey Stage: Onboarding

Active

Discovery

Schedule and run discovery meeting

Accounts 3

Task

Schedule and deliver business discovery meeting

Task

Send discovery meeting summary email

Active

+ Add

1 Card

Implementation

Implementation

Accounts 4

Task

Step 3: Configuration

Task

Step 2: Data Integration

See 3 more

Active

Weekly Value Report

Accounts 1 Users 1

Keep your product front-of-mind with a weekly value report for Key Contacts

Recurring

Weekly on Monday

Draft

+ Add

2 Cards

Live

Post-Onboarding Satisfaction Survey

Accounts 1 Users 1

We value your feedback.

Email prompting users to provide feedback about their onboarding experience

Ongoing

Start Now

Active

High CSAT Score

Accounts 2

Task

Request Reference

Task

Upsell Opportunities?

Active

+ Add

2 Cards

Onboarding Risks

CSM Outreach for Onboarding Delays

Accounts 3 Users 1

This email is automatically sent to key contacts when Onboarding is delayed

Ongoing

Start Date: May 18 2021

Active

Onboarding Delayed

Accounts 2

Task

[Name] onboarding may be delayed

Active

Low CSAT Score

Accounts 2

Task

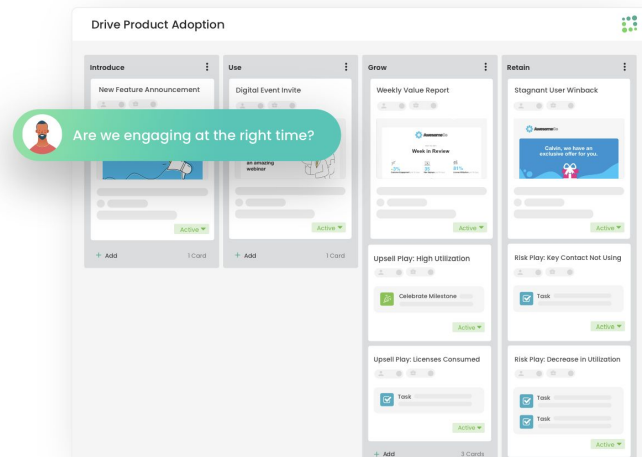
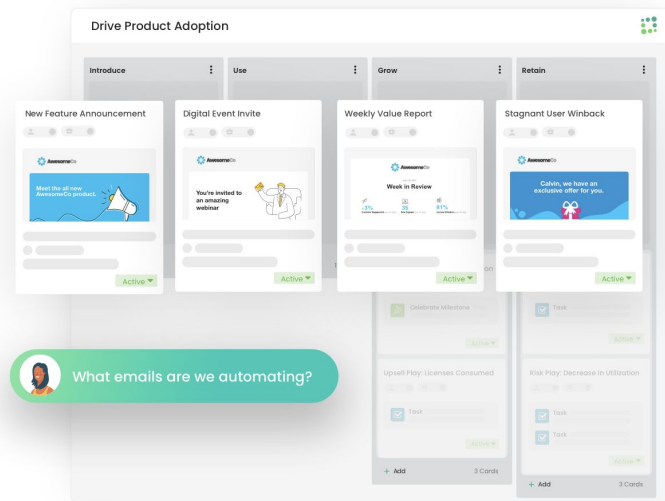
Reach out to the customer create a mitigation plan

Inactive

+ Add

# Instant Clarity. No Guesswork.

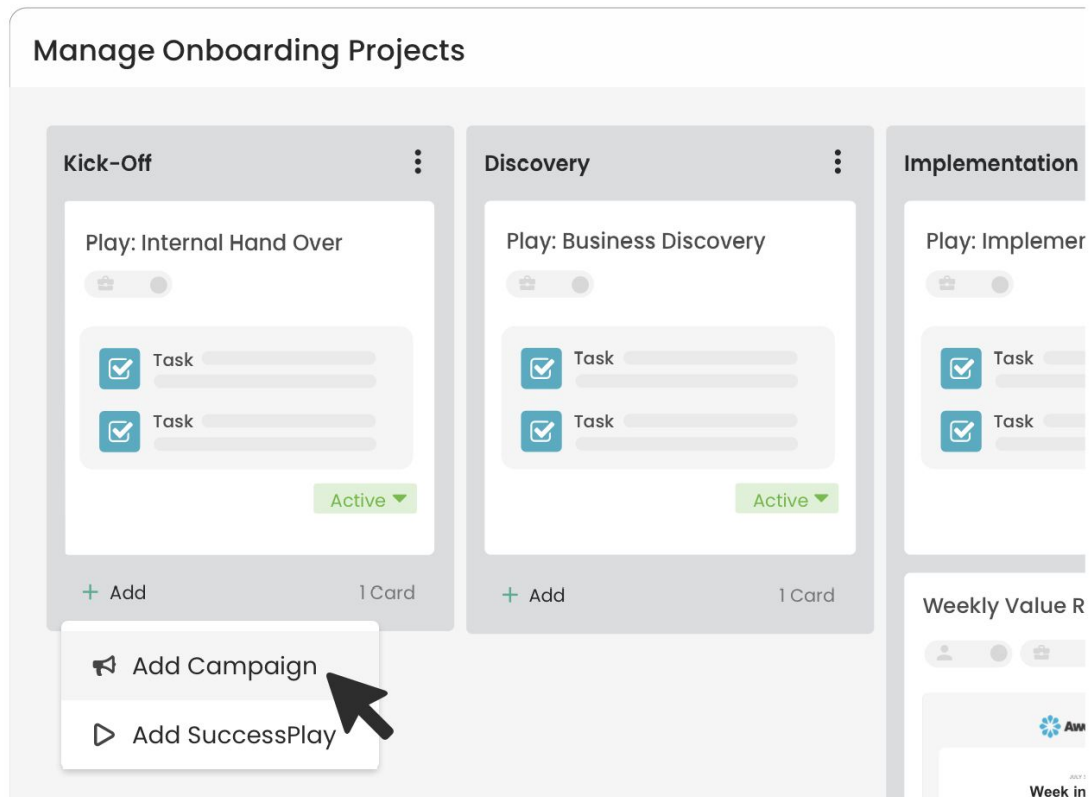
Understand the  
complete picture of  
your customer  
journey with  
amazing visual  
fidelity.





# From idea to action, in seconds.

Simple and intuitive, with unmatched control to shape your vision.



# Jump start your success.

Leverage ready to go templates with everything you need to start, run, grow and stand out from the crowd.

All SuccessBLOCs

## By Journey Stage

Evaluation  
Onboarding  
Adoption  
Renewal  
Expansion  
Advocacy

## By Touch

Low Touch  
High Touch  
Digital Touch

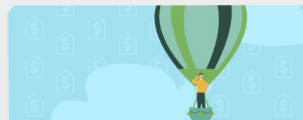
## By Role

Executive  
Operations  
Product  
Sales  
Success Manager

## By Program

Cisco Partners  
Customer Success  
Growth  
TSIA LAER

## Popular SuccessBLOCs



### Maximize Upsells

Proactively manage upsells, improve overall efficiency, and visualize ...

Get

View Details



### Drive Product Adoption

Elevate insights to drive desired actions, help customers get the most...

Get

View Details



### Manage Onboarding Products

Dramatically improve the new customer onboarding journey and delight e...

Get

View Details

### Maximize Upsells

Proactively manage upsells, improve overall efficiency, and visualize ...



Get

View Details

### Manage Contract Renewals

Implement the right measures and processes to make sure your customers...



Get

View Details

### COVID-19 Toolkit

Your customers are as anxious as you are when it comes to COVID-19 and...



Get

View Details

### Run VOC Programs

Run your Voice of the Customer Program using this SuccessBLOC and gath...



Get

View Details

### Drive Product Adoption

Elevate insights to drive desired actions, help customers get the most...



Get

View Details

### Automate Renewals

Automate your renewal process to increase customer retention and growth...



Get

View Details

### Convert Freemium

Increase activation, conversion, and retention of your freemium custom...



Get

View Details

### Manage Key Accounts

A key account management SuccessBLOC helps you and your team focus you...



Get

View Details

### Manage Onboarding Products

Dramatically improve the new customer onboarding journey and delight e...



Get

View Details

# Product Demo



# Questions?



# Thank You

