



customer conversation release notes January 2023

Your Corporate Visions subscription includes automatic access to current research, new products, new releases, and product updates.

Maximize the value of your subscription by keeping it current with these recently released upgrades. Major announcements are highlighted below, with product-specific details on the following pages.

Virtual Coach Microsite Refresh

The Virtual Coach microsite has been refreshed with an updated design and all-new videos and animations. The updates include the latest Corporate Visions video and digital content, and all material has been updated to reflect our latest research. The concepts covered and all of the URLs remain unchanged, so there is no need to update any links.

Expansion of the Customer Success Suite

The importance of Customer Success on your revenue growth and overall success continues to grow. Recent industry reports found that:

- Increasing customer retention rates by 5% can increase profits by 25% up to 95%.
- Companies with the highest net recurring revenue (NRR) invest 10% of revenue in customer success.
- Highly engaged customers tend to buy **90% more often, spend 60% more per transaction**, and have **3X** the annual value for companies compared to other customers.

Source: State of Customer Success 2022 by Technology & Services Industry Association (TSIA)

That's why Corporate Visions continues to invest in growing and improving its suite of Customer Success Skills.

Expand Success Digital

A totally new active learning experience focused on customer success skills contributing to customer expansion.

The probability of closing an opportunity with an existing customer is 70%, compared to just 20% with a new prospect. Based on the growing importance of customer expansion 61% companies now include expansion in their customer success charter. The Expand Success concepts and intellectual property

remain unchanged, but they are now supported by **digital modules**. The digital modules include a rich variety of media and modalities to improve the learning experience and retention. This includes videos, animations, engaging visuals, and learner interactions. Of special note are videos of CVI consultants sharing stories and key learnings that bring the Expand Success experience to life.

New practice modules and video simulations improve retention and application.

The Inline experience has been upgraded with new practice modules at the end of each section of the course. Learners practice their new skills within simulated situations that prepare them to apply the skills to their own customers. Also brand new, is a simulation for each decision that presents video scenarios where learners practice taking part in Why Evolve and Why Stay conversations with customers.

Take a look at this [introduction](#) video to be used in the course invites.

Redesigned Inline workbook connects the learning experience to real-life skills and customer application.

The Inline experience also integrates the interactive workbook into the daily learning experience. Each day ends with the learner completing workbook activities to apply the new concepts and skills to one of their own customers.

Expand Success Instructor-led redesign

Restructured instructor-led experience aligned with the new digital experience

The instructor-led agendas have been updated and reorganized to align with the flow of the Inline experience. Core concepts like the Messaging Void and Triple Metric have been moved to the workshop opening; Why Stay now comes before Why Evolve. One of the new digital simulations has been included as the day-1 concept review.

Create Success Digital

A totally new active learning experience focused on customer success onboarding and change management.

Implementing new solutions becomes a change initiative for customers. Create Success for Customer Success now includes a focus on the role of customer success professionals as a catalyst for that change. That means promoting change to stakeholders throughout the organization in a way that overcomes Reactance and Status Quo Bias. The other concepts and intellectual property remain unchanged—Why Change Story; Partnership Metrics; Partnership Planning; and Securing Pivotal Agreements. Now all of these concepts are available in an inline digital experience that includes a rich variety of media and modalities. This includes videos, animations, engaging visuals, and learner interactions.

New practice modules and video simulations improve retention and application.

The Inline experience includes practice modules at the end of each section of the course. Learners practice their new skills within simulated situations that prepare them to apply the skills to their own

customers. Also included, is a Why Change simulation that presents video scenarios where learners practice delivering a Why Change message positioned to overcome a customer stakeholder's Status Quo Bias.

Take a look at this [introduction](#) video to be used in the course invites.

Redesigned Inline workbook connects the learning experience to real-life skills and customer application.

The Inline experience also integrates the interactive workbook into the daily learning experience. Each day ends with the learner completing workbook activities to apply the new concepts and skills to one of their own customers.

Create Success Instructor-led Redesign

Restructured instructor-led experience aligned with the new digital experience

The instructor-led course has been redesigned to include the focus of being a catalyst for change. The simulation has been integrated into the instructor-led deliveries to provide additional engagement and practice. Both the virtual and in-person experiences are live teach, except for the simulation, while e-learning modules can be accessed for post workshop reinforcement.

Ongoing Change Log

It's never been easier to see what's new and updated.

You can view all [Product Updates](#) like this one in the Subscriber Portal and access a detailed [Product Change Log](#) to give you visibility into file-specific changes and recommendations.

Expand Success	
product	update
Expand Success Inline	<ul style="list-style-type: none"> • New—digital course content designed to optimize learning and application to customers. There are two one-week courses—Why Stay and Why Evolve. • New—Message for the Moment is a common set of introductory learning that sets up the Expand Success experience with three e-learning modules and a practice module. • New—Why Stay is now the first decision and consists of four e-learning modules, two practice modules, a Why Stay simulation and a video fluency challenge. • New—Why Evolve consists of five e-learning modules, two practice modules, a Why Evolve simulation, and a video fluency challenge. • Provision by individual decision or as an integrated Expand Value program. Refer to your Self-Host handbook when building these courses. • English—Expand Success Inline is only available in English.
Expand Success virtual Instructor-led	<ul style="list-style-type: none"> • Updated delivery order—Why Stay now comes before Why Evolve in a 2-day workshop. • Includes—e-learning integrated into the morning sessions only, allowing more time for instructors to provide insights and practice throughout the day. • New—e-learning modules, practice modules, simulations, and video challenges. • Updated to reflect content updates—Virtual leader slides, instructor-led workbook, planners and other virtual assets have been updated. • English—Expand Success is only available in English.
Expand Value Skills In-person Instructor-led	<ul style="list-style-type: none"> • Updated delivery order—Why Stay now comes before Why Evolve in a 2-day workshop. • No longer—includes e-learning pre-work. • Updated—to reflect content updates and order changes—leader slides, leader guide, instructor-led

	<p>participant workbook, planners and other In-person assets have been updated.</p> <ul style="list-style-type: none"> • English—Expand Success is only available in English.
Expand Success Insights	<ul style="list-style-type: none"> • New—library of short videos from CVI consultants to reinforce Expand Success. Available as a new Allego Channel and for self-host.

Create Success	
product	update
Create Success Inline	<ul style="list-style-type: none"> • New—digital course content designed to optimize learning and application to customers. There are 6 e-learning modules, 3 practice modules, a simulation, and a fluency challenge. • Provision by using your Self-Host handbook. • English—Create Success Inline is only available in English.
Create Success Virtual and In-person Instructor-led	<ul style="list-style-type: none"> • Redesigned—agenda, slides, and leader guide to provide continuity in the learning experience with the addition of the concept of Be a Catalyst for Change. • Simulation—the simulation is included as part of the workshop experience to set the stage for Why Change. • Provision by using your Self-Host handbook. • English—Create Success Inline is only available in English.
Create Success Coaching for Customer Success Leaders	<ul style="list-style-type: none"> • Updated—coaching kits and course materials to include the concepts of Be a Catalyst for Change.
Create Success Insights	<ul style="list-style-type: none"> • New—library of short videos from CVI consultants to reinforce Create Success Skills. Available as a new Allego Channel and for self-host.