

Customer Success Milestone Plan Questionnaire

This questionnaire is designed to help define, track, and align on key milestones for your journey with us. Please fill out the details below to establish your Customer Success Milestone Plan.

1. General Information

Company Name:

Primary Contact Name:

Contact Email:

Target Go-Live Date:

2. Key Business Objectives

What is the primary business problem you are trying to solve?

What are your top three success metrics (KPIs)?

3. Customer Success Milestones

Milestone 1: Kickoff & Alignment

Target Completion Date:

Key Deliverable / Success Criteria:

Milestone 2: Technical Integration & Setup

Target Completion Date:

Key Deliverable / Success Criteria:

Milestone 3: User Training & Onboarding

Target Completion Date:

Key Deliverable / Success Criteria:

Milestone 4: First Value Achieved (Quick Win)

Target Completion Date:

Key Deliverable / Success Criteria:

Milestone 5: Full Adoption & Business Review

Target Completion Date:

Key Deliverable / Success Criteria:

4. Resource & Stakeholder Mapping

Executive Sponsor (Name & Title):

Project Manager / Main Admin (Name & Title):

Technical Lead (Name & Title):

5. Risks & Mitigation Plan

What are the potential blockers or risks to achieving these milestones on schedule?

6. Sign-off & Commitment

Customer Representative Signature:

Date:

Customer Success Manager Signature:

Date: