STRETCHLEARN · WORKBOOK

Customer Success Marketing — Workbook

This workbook gives you the exercises, worksheets, and templates to immediately apply every framework from the Customer Success Marketing course to your own business. Work through each section in order — each builds on the last, and by the final action plan you will have a functioning CS marketing system ready to run. Bring real numbers from your business wherever possible; the more specific your inputs, the more actionable your outputs.

Building the Business Case

Quantify your churn gap, size the expansion opportunity, and draft the one-page business case to align marketing and CS.

Exercise: Churn Cost Calculator

Use your company's actual revenue and churn data to calculate the annual cost of your current churn rate and the dollar value of a one-point improvement. If you do not have exact figures, use conservative estimates and note them.

• What is your current Monthly Recurring Revenue (MRR) or Annual Recurring Revenue (ARR)?

• What is your monthly or annual gross churn rate (percentage of customers or revenue lost each period)?

• Using the formula: Annual Churn Cost = MRR x Monthly Churn Rate x 12, what is your annual revenue lost to churn?

• If you reduced annual churn by 2 percentage points, how much revenue would you retain? How does that compare to the cost of one full-time CS marketing hire?

Worksheet: Business Case One-Pager

Complete every field to produce a business case you can present to leadership. Use your churn cost calculator results for the gap quantification row.

Current NRR (%):

Current annual gross churn rate (%):

Annual revenue lost to churn ($):

Top 3 expansion-ready accounts identified (Account name + estimated expansion ARR):

Proposed investment (headcount + tools + campaigns) — Year 1 ($):

Projected NRR improvement in 12 months (percentage points):

Projected revenue retained/expanded from NRR improvement ($):

Projected ROI (Revenue impact / Investment):

Proposed pilot duration and success criteria (3 metrics):

Key stakeholder to present to and their primary objection to address:

Checklist: Alignment Readiness Checklist

[ ] I can access customer health or usage data from our product analytics tool
[ ] I have a list of all customers with their contract value, renewal date, and assigned CSM
[ ] Marketing and CS have a shared recurring meeting (at minimum monthly)
[ ] Our CRM has a field to tag customers by lifecycle stage (onboarding, adoption, expansion, etc.)
[ ] We have a defined activation event for new customers
[ ] We have sent at least one NPS survey in the last 6 months
[ ] I know our current NRR figure
[ ] Leadership has agreed that NRR is a shared KPI between marketing and CS

Health Scoring and Churn Prevention

Build your first Customer Health Score model and design the intervention campaigns for at-risk segments.

Exercise: Health Score Model Design

Design your first Customer Health Score using the five signal categories from the course. For each category, identify the specific data source available to you and define the threshold for scoring 1, 5, and 10 out of 10.

• For Product Engagement: what is the single best usage metric you currently track, and what values represent low/medium/high engagement for your product?

• Which of the five signal categories (Product Engagement, Support, Relationship Depth, Financial Health, Voice of Customer) do you have clean, accessible data for right now? Which are gaps?

• Based on conversations with your CS team, which signal category has the strongest correlation with customers who churned in the last year? Assign it the highest weight.

• Pick five churned accounts from the last 12 months and score them retroactively using your model. Does your model correctly flag them as red before churn? What would you adjust?

Worksheet: Intervention Campaign Planner

For each of the four failure modes (low adoption, lost champion, unresolved issue, value confusion), document the specific campaign you will build for your company. Be specific about email subjects, call-to-actions, and who sends each email.

Failure Mode 1 — Low Adoption: Trigger condition (health score threshold + signal):

Low Adoption: Email 1 subject line and CTA:

Low Adoption: Email 2 subject line and CTA:

Low Adoption: Who sends Email 3 (marketing alias or CSM name)?

Failure Mode 2 — Lost Champion: Trigger condition:

Lost Champion: Executive outreach email — from name/title and key message:

Failure Mode 3 — Unresolved Issue: Suppression rule (which campaigns pause when P1/P2 ticket is open)?

Failure Mode 4 — Value Confusion: What data will you pull to auto-generate the personalized ROI report?

Which marketing automation tool will you use to build these workflows?

Who owns QA of these campaigns before they go live?

Checklist: 30-60-90 Day Campaign Launch Checklist

[ ] Day 30 campaign: CEO welcome email written and approved
[ ] Day 30 campaign: Activation event defined and trackable in our product analytics tool
[ ] Day 30 campaign: Enrollment trigger set up in marketing automation tool
[ ] Day 30 campaign: CSM cc'd on all Day 24 and Day 28 emails
[ ] Day 60 campaign: Advanced tips email series written (minimum 3 emails)
[ ] Day 60 campaign: Peer benchmark report or data source identified
[ ] Day 90 campaign: ROI report template built and data-pull automated
[ ] Day 90 campaign: Business review call invite linked in email
[ ] All three campaigns suppress when health score exceeds 70
[ ] All three campaigns pause when a P1/P2 support ticket is open
[ ] Unsubscribe and CASL/GDPR compliance confirmed with legal

Expansion Revenue Programs

Identify your expansion pipeline, write the upgrade campaign, and set up the attribution model.

Exercise: Expansion Signal Audit

Run the expansion signal scorecard against your top 20 customers by ARR. Identify which tier (1, 2, or 3) each account falls into and write a one-sentence expansion hypothesis for each Tier 1 account.

• List your top 10 customers by ARR. For each, note their seat utilization %, number of feature-limit hits in the last 30 days, and number of departments actively using the product.

• Which 3 customers have two or more expansion signals active AND a health score above 70? These are your Tier 1 targets for this quarter.

• For each Tier 1 account, write one sentence: "[Company] is ready to upgrade to [tier] because [specific signal] and it will help them [specific outcome they have expressed interest in]."

• What is the total potential expansion ARR if all Tier 1 accounts upgraded to the next tier? Is this number meaningful enough to warrant a dedicated campaign this quarter?

Worksheet: Expansion Email Sequence Builder

Draft all four emails in your expansion sequence for one specific Tier 1 account segment. Fill in every field — do not leave placeholders. You should be able to load these into your marketing tool immediately after completing this worksheet.

Target segment (account tier, industry, or product tier being upgraded from):

Email 1 — Milestone subject line:

Email 1 — The milestone you are celebrating (specific metric from their account):

Email 1 — Bridge sentence to what comes next (one sentence, no pitch):

Email 2 — Peer benchmark: what outcome do similar companies achieve at the next tier?

Email 2 — Source or data point for the benchmark (customer story, internal data, or industry report):

Email 3 — Specific use case they cannot achieve on current plan:

Email 3 — Case study customer name and result to include:

Email 4 — Sent from (CSM name and title):

Email 4 — Specific upgrade offer or pricing anchor:

Email 4 — Call-to-action (calendar link or checkout page URL):

Suppression rule: which health score threshold pauses this sequence?

Checklist: Expansion Attribution Setup Checklist

[ ] All expansion campaigns tagged with UTM parameters (utm_source=cs-marketing, utm_campaign=expansion)
[ ] CRM opportunity record includes an attribution field for CS marketing touchpoint (yes/no + campaign name)
[ ] Zapier or native integration auto-populates attribution field when a campaign click precedes opportunity creation
[ ] Monthly expansion pipeline report shared with CS and sales leadership
[ ] Expansion dashboard created with the four required views (pipeline by tier, email performance, attribution split, NRR trend)
[ ] CS rep notified via Slack/CRM task before Email 3 is sent
[ ] Email 4 sent from CSM personal email address, not marketing alias
[ ] Post-expand onboarding sequence exists for new tier features

Customer Advocacy and Case Studies

Build your advocate identification system, run your first case study production sprint, and measure advocacy ROI.

Exercise: Advocate Identification Sprint

Using your NPS data, review site profiles, and CRM, identify your first five advocate candidates this week. Map each to their position on the Advocate Spectrum and plan the specific first activation ask for each.

• Pull all customers who scored 9 or 10 on your most recent NPS survey. How many are there? What percentage of your customer base do they represent?

• Search G2, Capterra, or Trustpilot for your company name. How many positive reviews exist? Are any from customers not already in your NPS promoter list? Add them to your advocate candidates.

• For each of your top five advocate candidates, classify them as passive (NPS 7-8), active (NPS 9-10, not yet publicly vocal), or champion (NPS 9-10, executive, publicly positive). What is the appropriate first activation ask for each?

• What specific benefit can you offer in exchange for each activation action? (Examples: gift card for a review, early feature access for a webinar speaker, co-marketing for a case study champion.)

Worksheet: Case Study Production Brief

Complete this brief before approaching a customer for a case study. It ensures you can explain exactly what you are asking for, what they will get in return, and what the final output will look like.

Customer company name and champion name/title:

Why this customer is a strong case study subject (specific outcome metric):

What the customer gets in return (co-marketing, backlink, gift, executive visibility):

Situation — 2 sentences describing the customer's business before your product:

Tension — the specific cost or pain of the problem before your product:

Key outcome metric #1 (e.g., 40% reduction in time-to-close):

Key outcome metric #2 (e.g., $120K in expansion revenue identified in first 6 months):

Direct customer quote (draft for champion to approve or edit):

Formats to produce (PDF / landing page / one-pager — check all that apply):

Publication date target:

Legal approval required? (yes/no) — if yes, legal contact name:

Checklist: Advocacy Program Quarterly Review Checklist
[ ] Count of identified advocates updated in CRM this quarter
[ ] Count of newly activated advocates (completed at least one advocacy action) this quarter
[ ] Activation rate calculated (activated / identified) and compared to 20-35% benchmark
[ ] New case studies published this quarter vs. quarterly goal
[ ] Case study utilization rate calculated (shared in active sales cycles / total active cycles)
[ ] Reference call conversion rate calculated for deals that included a reference call
[ ] G2/Capterra aggregate score and monthly review count logged
[ ] Advocacy-sourced pipeline as a percentage of total pipeline calculated
[ ] NPS survey sent this quarter and results logged vs. prior quarter
[ ] Top three advocacy program improvements identified for next quarter

Your Action Plan

1. Calculate your annual churn cost using MRR x monthly churn rate x 12, and use it as the foundation of your business case
2. Book a 60-minute alignment meeting with your CS lead this week and establish a shared monthly cadence with NRR as a standing agenda item
3. Build your first Customer Health Score model in a spreadsheet using the five signal categories; score your top 20 accounts and identify all red and yellow accounts
4. Design the four failure-mode intervention campaigns and configure enrollment triggers in your marketing automation tool before the end of the month
5. Launch the Day 30 lifecycle email campaign for all new customers starting from a defined go-live date; suppress at health score 70+
6. Run the expansion signal scorecard across your full customer base and produce a ranked Tier 1 / 2 / 3 expansion pipeline list
7. Draft and load the four-email expansion sequence for your top Tier 1 segment; review with the assigned CSMs before activating
8. Set up UTM tagging and CRM attribution fields for all expansion campaigns so you can measure marketing's contribution to expansion revenue
9. Identify your first five advocate candidates using NPS data and review sites; send personalized activation emails within 48 hours
10. Complete one case study from end to end using the STAR framework and the two-week production timeline; publish and distribute to the sales team