

Cheatsheet: Make your customers take actions

This checklist is designed to help Customer Success Managers effectively engage and guide their customers towards successful task completion and decision-making.

How to build the project plan

Guidelines for breaking down and structuring project plans in a manageable, customer-friendly way, ensuring each step is clear and achievable.

- ❑ Break down complex project plans into **bite-size** parts.
- ❑ Start with **small requests** from the customer before progressing to larger ones.
- ❑ Focus on the **most relevant** action items (top 5).
- ❑ Show your customer that they've **already started** working towards their success.
- ❑ **Gradually** reveal the different parts as your customer progresses.
- ❑ Ensure the final steps in a task sequence are **positive and memorable**.
- ❑ Order tasks in a sequence that **feels natural** and builds on previous accomplishments.
- ❑ When you share a task plan with your customer, **mark one of the tasks as completed**.
- ❑ Use **icons, colors, or progress bars** to visually represent task completion or urgency.

How to build tasks to drive action

Tactics for crafting effective and engaging task descriptions, using motivational language and clear calls to action to encourage prompt completion.

- ❑ Write task descriptions with **verbs at the beginning**, such as "Complete setup," or "Review proposal".
- ❑ Use language that resonates with the **user's needs and goals**, making them feel understood and supported in their tasks.
- ❑ Use **personalization tokens** from their own data/information provided.
- ❑ Provide **short, focused guides** or tutorials relevant to the tasks at hand.
- ❑ Frame tasks in a way that **highlights potential losses or missed opportunities** if a user doesn't take action. This can motivate them to act more swiftly.
- ❑ The call to action should be clear. **Use bold/colors to highlight the action**. Additional instructions/resources can be shared, but cannot distract from the task itself.
- ❑ Surface links, images, or collect information directly from the task - **to close the loop faster**.

How to give your customer a sense of ownership

Strategies to involve customers deeply in the process, fostering a sense of personal investment and commitment towards the project goals.

- ❑ Ask your customers **'When would you like to go live?'** date.
- ❑ Share this date at the **top of the interface**, with their face/name
- ❑ Involve customers in **co-creating** or customizing part of the process, increasing their investment in the outcome.
- ❑ **Ask for input** from your customers (goals, tech stack, priorities, etc) and based on that (and only after they've provided that) - share a **tailor-made plan for them**
- ❑ Allow users to have a sense of control over their actions within the interface. Provide options for **customization and personalization**.

How to pull customers back into action

Methods to rekindle customer interest and participation in ongoing tasks, using reminders, success stories, and interactive elements.

- ❑ Remind customers of incomplete tasks; **our brains remember uncompleted tasks** better than completed ones.
- ❑ Share stories of successful task completion by **similar customers**.
- ❑ Use **callouts with a familiar face** that motivates into action.
- ❑ Send brief, personalized **video messages** to encourage task completion.
- ❑ Use an **interactive interface** where customers can easily mark tasks as completed.
- ❑ Present the action items as a checklist - and **let your customers complete the checklist** - our mind is addicted to it and every click makes us want to complete another task.
- ❑ Surprise them with **unpredictable rewards when reaching milestones** (for example, present an exciting popup when reaching an important milestone)
- ❑ Make it **easy to access and return**, no one returns to read emails.
- ❑ Make it **mobile-friendly**.

How to drive your customer to make a decision

Techniques to simplify the decision-making process for customers, utilizing limited choices and social proof to guide and expedite decisions.

- ❑ Show them a list of **limited choices** over an open-ended question
- ❑ **Hick's Law**: This principle suggests that the more choices a user is presented with, the longer it will take them to make a decision. Simplify choices and streamline decision-making processes within the interface.
- ❑ **Mark your recommendation** - make it personal though, based on their goals, segment, size, etc - and show that 'customers like you usually choose this option'
- ❑ Use **social proof to push towards a decision** - 'This is how Gong uses EverAfter for their low-touch onboarding'

And few words about aesthetic

Insights into the importance of aesthetics in the user experience, highlighting how a visually pleasing and mood-lifting design can enhance problem-solving and task completion.

- ❑ **When we are relaxed, our brains are more flexible** and more likely to find workarounds for difficult problems.
- ❑ **Good visual aesthetics** compensate for poor usability, improving task completion time, and reducing errors.
- ❑ Being in a good mood allowed people to **"eliminate unimportant information** and find useful heuristics to solve the problem" (Isen and Means, 1983).

EverAfter's B2B Customer Interface has a built-in UX elements to motivate customers to take action. **Let's talk!**