



CS Strategy in One Page Playbook

Guy Galon



23 years in customer-facing roles: 6 Years in London and 14 years on planes



Lived and breathed Software Dev, Test, Deployment, Professional services and Support for +20 years



VP Customer Success
Executive Advisor



I love sports and Writing



First novel published in 2021
Second novel published in 2023



What is the strategy “one pager”?

- Illustration (via pictures or graphics) that highlights the key components of the strategy
- Utilizing a common and familiar perspective and terminology to simplify the communication of the strategy
- It does not summarize all the aspects of the strategy
- It does not replace the need for a detailed strategy document



One Pager Strategy – The main benefits

- Highlight the purpose and expected impact
- Highlight the expected changes and actions resulting from the strategy
- Drives immediate feedback
- Formulated into a story that people easily understand
- Drives the necessary support and commitment



Strategy one pager – Example (1/2)

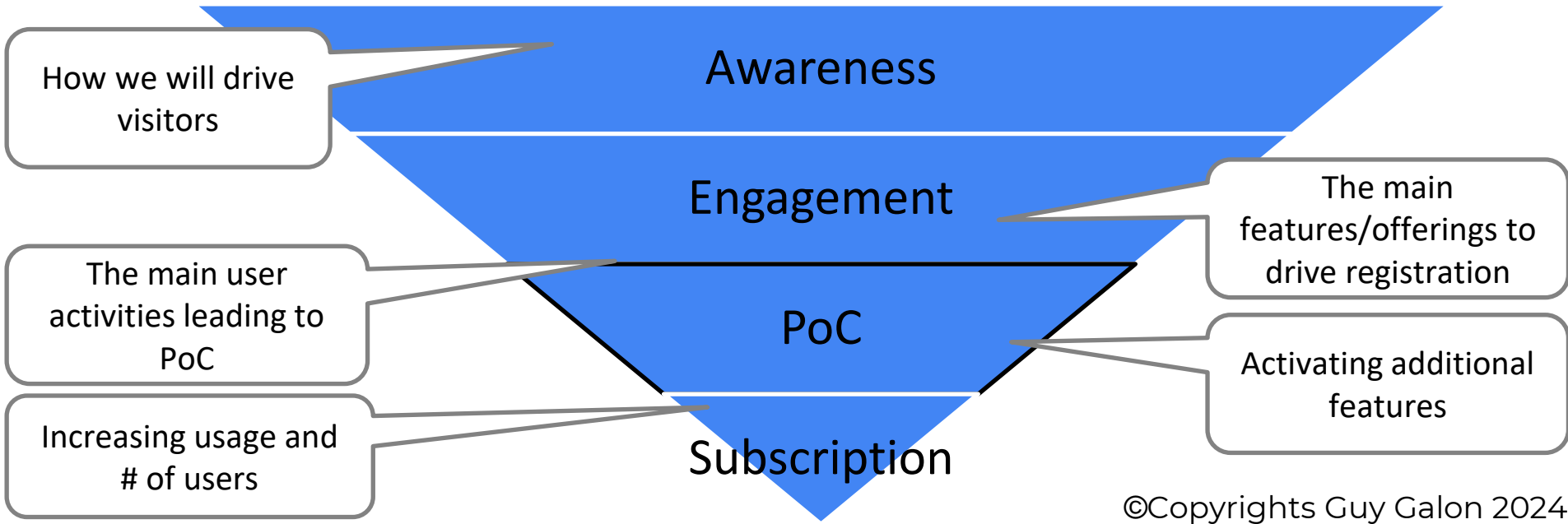
- Our company (“AINCS” – a fictitious company) provides an AI-based SaaS product to support the decision process of CS professional
- We plan to drive CS professionals to our website to engage with the engine free of charge(limited feature set)
- Then offer an additional paid subscription
- How can one Pager strategy be presented? (next slide)

Strategy one pager – Example (2/2)



Customer Experience Goals:

1. Drive X unique user on a weekly/monthly basis
2. 20% of visitors registered as users/ 50% of them are active
3. X PoCs / monthly
4. 50% of the PoCs converted to subscription





Creating a One Pager Strategy

(for “AINCS” – Fictitious company)

- Define what success looks like for my organization
- Clarify what are the essential capabilities to enable success
- What is the perspective to best illustrate the strategy
- Create the Picture/drawing



Define what success looks like for my organization

- What is our vision?

Example:

To revolutionize the decision process of CS professionals based on AI and data analysis

What are our objectives?

Example:

- *5x increase in registered users in 2 years*
- *Increase revenue by 100% in 2 years*



Clarify the essential capabilities to enable success

- Invest in Technology to develop unique AI capabilities for CS professionals
- Invest in Technology to automate the customer journey
- Invest in driving awareness in the ABC Market segment/Geography



What is the perspective to best illustrate the strategy

- **Stakeholders** – by illustrating their journey or their experience
- **Product** – new capabilities/ roadmap to enable the strategy and achieve the expected results
- **Process** – highlight a critical process end-to-end. Example: order-to-activation process of a digital entertainment service/subscription.
- **Location** – illustrate the specific place where stakeholders will interact with your product (examples: retail store, Cinema, manufacturing plant, sports venue, etc.)



Tips

- One pager should be created based on the Strategy document and the process outlined in this playbook
- The one-pager is created to present the strategy. The strategy document can then be sent to the audience.
- “Tell the story” behind the illustration.

For example:

- “ *A day in the life of CS professional.*”
- “ *The performance of the CS professional with/without the AI service*”

THANK YOU!



GUY GALON

Executive Advisor
galon99@hotmail.com

