

Bold Value Customer Growth

Equip your customer success teams to retain, grow, and strengthen every customer.

WHAT YOU WILL GAIN

Your customer-facing professionals play the biggest role in caring for and growing the lifeblood of your business, your customers, yet many have never been equipped with the process, skills, and tools to keep those relationships strong. Most of your future growth is inside your current customers. Research finds the majority of value creation at successful growth companies comes from the existing base, not new logos.

HOW IT WORKS

Built on adult-learning best practices, it blends on-demand videos, live workshops tailored to your business, and a playbook of tools and templates.

WHY IT MATTERS

The way you develop your people shapes the way they treat your customers. When customer-facing professionals are equipped and supported, your customers feel the difference, and McKinsey research indicates that companies improving the customer experience can raise cross-sell rates by 15% to 25% and grow share of wallet by 5% to 10%.

Investing in your team is how you build both a stronger customer experience and a more capable, loyal workforce that wants to grow with you.

This comprehensive course and growth system closes that gap. It equips your team with the confidence, skills, process, and tools to elevate the customer experience, recognize retention risk and growth opportunity early, and communicate stronger value in the customer's language.

The result is stronger retention, more expansion, and a steady flow of referrals, delivered by the people your customers already know and trust, without feeling like sales training your team might reject.

FROM FIRST INTERACTION TO REFERRAL

Across the full post-sale lifecycle, your team builds the skills that turn everyday customer interactions into stronger loyalty, deeper relationships, and a steady flow of upsells and referrals.



**Onboard with
Impact**



**Engage and
Optimize**



**Advance and
Expand**



**Activate
Advocacy**

EQUIPS YOU TO ACHIEVE

- Strengthen retention and renewals by equipping your team for the everyday moments that improve loyalty
- Uncover expansion opportunities inside the relationships your team already manages
- Turn satisfied customers into referrals and references, creating a repeatable, lower-cost source of new opportunity
- Build the confidence and professional impact skills of experts and account managers
- Improve internal team collaboration while reducing friction and effort in customer interactions



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The Bold Value Customer Growth course equips your team across eight connected modules following the full post-sale lifecycle, from onboarding through lasting advocacy. Through self-paced learning, each module includes about 10 videos and 3-4 tools completed within 60 to 90 minutes.

ONBOARD WITH IMPACT

Module 1: Mindsets & Stakeholders

Every interaction is more impactful when your team builds the customer-driven mindset and stakeholder insight that carry from the first onboarding conversation through every call and meeting that follows, positioning them as trusted advisor who improve customer results.

Module 2: Know Your Customer

Your team maps how customers decide, who influences those decisions, and what each stakeholder values, so the relationships built during onboarding become the foundation for stronger retention, expansion, and referrals.

ENGAGE AND OPTIMIZE

Module 3: Trusted Advisor Skills

Rapport, presence, empathy, and expert listening deepen stakeholder trust once the relationship is underway, giving your team the kind of relationship customers hesitate to leave when a competitor comes calling.

Module 4: Communicate with Credibility

Translating technical expertise into value using the customer's language, choosing the right communication channel, and leading productive meetings help your team show customers the value they are receiving while improving collaboration.

ADVANCE AND EXPAND

Module 5: Drive Customer Value

Once trust is established, insight-led conversations help your team disrupt and remove the barriers limiting customer results, deepening trust and surfacing upsell opportunities competitors often overlook, elevating retention, upsells, renewals, and referrals.

Module 6: Develop Value

Strategic questioning helps your team uncover customer needs and goals and quantify the full value of solving their challenges, co-creating business cases customers are motivated to champion when renewal and expansion decisions come up.

ACTIVATE ADVOCACY

Module 7: Deliver Bold Value

Compelling proof, client success stories, and coordinated team communication equip your team to inspire confident customer decisions, earning renewals, retentions, and upsells while turning satisfied customers into willing referral sources.

Module 8: Apply for Lasting Results

A 90-day growth plan and simple impact tracking turn every skill into daily habits, helping your team sustain customer results, deepen growth partnerships, and keep referrals coming long after the course ends.