

Course Description

This course demonstrates how Revenue Analytics™ Playbooks can help you retain and grow your customer relationships and revenue by automating your customer engagement process. The session will use analogies, real business examples and exercises to help you understand our Playbook functionality and show you how to create different rules to trigger and monitor customer engagement interactions at the user, subscription and customer level.

Additionally, we will explain the process for working with our Revenue Analysts to set up Playbooks and what steps you can take to prepare for that interaction.

Part 1: Playbooks Concepts and Scenarios – 45 Min

- Anatomy of a Playbook
- Deciding on Milestones (Plays)
- Setting up Conditions for each Milestone
- Understanding Periods used in plays
- Setting Resolutions/Exit Criteria
- Understanding Exports and Frequencies

Part 2: Setting up Playbooks – 45 Min

- Exercises to understand the components of Playbooks
- The role of Revenue Analysts in setting up your Playbooks
- Planning Playbooks to discuss with your ServiceSource Revenue Analyst

Location

Training takes place online, using your own computer to access our WebEx session.

Duration

Classes may be scheduled in 1-hour to 3-hour time blocks, depending on topics covered

Class Size

Maximum of 10 learners per class for optimal time with our instructor and hands-on environment

Language

All classes are taught in English.

Scheduling

To schedule virtual training for your team, please contact your Engagement Manager.

Cancel/Reschedule

To cancel or reschedule a training, please notify your Engagement Manager 7 days prior to training.

About ServiceSource

ServiceSource International, Inc. (NASDAQ: SREV) is the global leader in recurring revenue and customer success management. B2B companies use ServiceSource to drive growth and build long-standing relationships across the customer lifecycle. Through its software and services, ServiceSource delivers higher subscription, maintenance and support revenue, and improved customer retention. Headquartered in San Francisco, ServiceSource® manages approximately \$14.5 billion in revenue for the world's largest and most respected technology, industrial, healthcare and life sciences, and media and information companies. **For more information, go to www.servicesource.com.**