

Customer Experience x RevOps Framework for B2B SaaS Startups

STAGE	IDENTIFY	DISCOVER	LEARN	SELECT	BUY	ONBOARD	IMPACT	SCALE	OFFBOARD
DESCRIPTION	Identifies a problem they want to solve	Hears about product/service for the first time	Researches potential solutions	Determines which solution to buy	Completes purchase	Receives orientation and training on the product/service	Sees the outcomes of using the product/service for the first time & its recurring impact over time	Buys additional and/or new products/services	Ends the relationship with the company
DOING + TOUCHPOINTS	Problem identified				End subscription	Complete exit interview			
ARTIFACTS		<ul style="list-style-type: none"> Content marketing Customer created content Website 	<ul style="list-style-type: none"> Content marketing Customer created content Website 	<ul style="list-style-type: none"> Website Pitch deck Proposal 	<ul style="list-style-type: none"> Contract Due diligence documentation 	<ul style="list-style-type: none"> Kickoff materials Training materials Impact plan 	<ul style="list-style-type: none"> Reports / analytics Customer stories Renewed contract Product / service resources Customer stories Documentation (problems, reviews, etc.) 	<ul style="list-style-type: none"> Expansion proposal Expansion contract Impact plan 	<ul style="list-style-type: none"> Customer data
THINKING	<i>I need a change</i>	<i>This is interesting!</i>	<i>What are my options?</i>	<i>Which solution best meets my needs?</i>	<i>I'm ready to commit</i>	<i>I'm learning how to use my new product/service</i>	<i>Do I see value in this solution?</i>	<i>I want more people to have access to the solution</i>	<i>I am ending the relationship</i>
FEELING	Frustration	Intrigue	Curious	Engaged	Committed	Eager	Validated	Confident	Acceptance
BACKSTAGE	CUSTOMER ACQUISITION					CUSTOMER RETENTION + EXPANSION			CUSTOMER CHURN
REVENUE OPERATING MODEL	Lead	Marketing Qualified Lead (MQL)	Sales Qualified Lead (SQL)	Opportunity	New Customer	Activated Customer	Advocate	Expansion Customer	Churned Customer
METRICS	<ul style="list-style-type: none"> Lead generation & development (click-through-rate, lead source, sales calls, emails, meetings) Quota attainment 	<ul style="list-style-type: none"> MQL to SQL rate MQL to Opportunity 	<ul style="list-style-type: none"> SQL to Opportunity rate 	<ul style="list-style-type: none"> Opportunity to close Average deal size Quota attainment 	<ul style="list-style-type: none"> Churn rate Customer satisfaction Customer engagement Net Promoter Score (NPS) Customer feedback 	<ul style="list-style-type: none"> Training outcomes 	<ul style="list-style-type: none"> First business impact Ongoing business impact Recurring Revenue (MRR, ARR) Health score Contract length 	<ul style="list-style-type: none"> Growth of business impact Upsell and/or cross-sell rate Scale internal capabilities 	<ul style="list-style-type: none"> Churn rate Customer feedback
PRIMARY OWNER		Marketing	Sales Development	Sales	Sales	Customer success	Customer success	Customer success	Customer success