Disclaimer

All strategy & actions would be subject to change based on additional knowledge gained by being employed by Abre. Much of the strategy, mission and vision would be constructed in collaboration with the existing team, and in consideration of current cultural norms.

This document was created as an example of a strategy that *could* be created by someone in the VP of Client Success position.

My personal comments/clarifications are in smaller, BLUE text.

AN ERA OF CLIENT VALUE AT ABRE

VP of Client Success Strategic Vision | Presented to the Client Experience Leadership Team

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WHAT TO EXPECT

Setting the Vision (The Why)

Introduction - An Era of Client Value

The Core Mission

The Execution Engine (The What)

Three Phases of Measurable Educational Value

Operational Rigor: Eliminating Handoff Risk

Predictive Renewal: The Client Health Score

Leadership & Governance (The Who & How)

VP Leverage: Intervening Strategically with District Leadership

The Four Pillars of Leadership

Talent Elevation and Execution Rhythm

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Client Success: A Strategic Plan

VP of Client Success Strategic Vision | Presented to Abre Leadership Team

1 Define a Unified Mission

Establish a single, aligned vision for Implementation Consultants and Client Success Managers.

2 Unveil a Framework

Present the operational rigor needed to accelerate **Time-to-Value (TTV)** and scale delivery.

3 Outline a Plan

Detail the strategy for de-risking renewals and achieving the **Net Revenue Retention (NRR)** target.

Setting the Vision (THE WHY)

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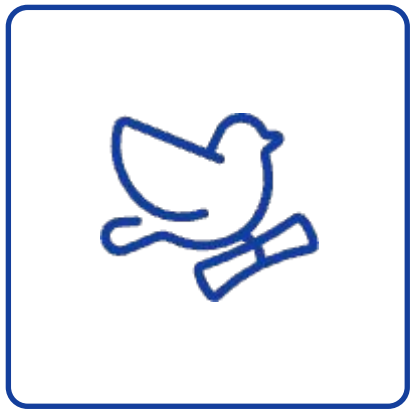
The Strategy's Two Components

This strategy converts Abre's client acquisition into a sustained, profitable growth engine, ensuring every dollar of client investment is returned as measurable educational value.



The Framework (What We Deliver)

Our Four Pillars of Leadership—building a culture of Systemic Ownership, Unbreakable Alignment, Impact Obsession, and Smart Bets.

The Culture (How We Win)

The Client Value Lifecycle—our repeatable system for accelerating TTV, eliminating handoff friction, and proving ROI.

Setting the Vision (THE WHY)

CS GUIDING MISSION & ACCOUNTABILITY

VISION STATEMENT:

- "Our commitment is to be the district executive's most trusted partner, securing long-term success by serving as the voice of the educator and be the "aha moment" for system-wide educational value."

PRIMARY GOAL (OKR):

- **Objective:**

  Cement Abre's position as the indispensable partner.

- **Key Result:**

  Increase Net Revenue Retention (NRR) for the total portfolio from Baseline % to Target % by the end of the next fiscal year.

The Execution Engine (The What)

THE CLIENT VALUE LIFECYCLE (THE JOURNEY)

Value Activation (IC Lead)

Goal: Achieve First Business Outcome (FBO) and rapid TTV. **Target:** <45 Days from Academic Year Start.

Sustained Workflow Integration (CSM Lead)

Goal: Embed Abre into the school day workflow, resulting in high **Feature Usage Saturation (FUS)** among all licensed educators and clear administrative time savings.

Strategic Value & Renewal (CSM/VP Lead)

Goal: Finalize the platform's contribution to the district's 3-5 strategic educational priorities, leading to justified renewal and expansion.

Target should be from academic year start to avoid any target achievement issues from early summer/late spring data inconsistencies.

The Execution Engine (The What)

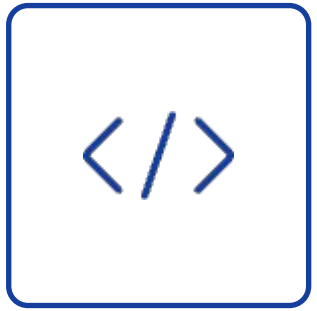
OPERATIONAL RIGOR: REDUCING SALES HANDOFF RISK

The Joint Value Blueprint (JVB): Standardizing the Handoff

This is the first step in the process that sets the stage for operational rigor.

Strategic Outcomes:

The 3-5 board-level educational objectives (The WHY)



Technical Prerequisites:

Verified SIS/SSO readiness (The HOW)

Handoff Risk Assessment:

Known political challenges and prior tech failures (The KNOWN)

The Execution Engine (The What)

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PREDICTIVE RENEWAL: THE CLIENT HEALTH SCORE

Details and quantitative definitions to be added after evaluation of current data & usage metrics, along with forecasting and benchmarking peers

Adoption

KPI: Feature Usage Saturation (FUS)

Measures the **depth of integration** into the daily workflow. A high score means a large percentage of licensed educators are consistently using the key features of the platform.

Value

KPI: Strategic Outcome Status

Measures the platform's alignment with the **executive ROI.** This is based on the status (Green/Yellow/Red) of the 3-5 strategic educational goals documented in the **Joint Value Blueprint (JVB)**.

Engagement/Risk

KPI: Executive Sponsor Score (ESS)

Measures the strength of the **Trusted Partnership.** This metric tracks the decision maker contact frequency, number of contacts, attendance at key Quarterly Reviews (QBRs), and the overall tenor of the renewal conversation.

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The Execution Engine (The What)

VP LEVERAGE: INTERVENING STRATEGICALLY

1

Primary Schedule

Targeted **Executive Risk & Value Alignment Sessions (ERVAS)**, delivered mid-year (Q2/Q3) to all high value districts. Primary goal is to be to help districts quantify & prove cost savings through data, making a renewal a financial imperative.

2

Trigger

Accounts flagged as **Yellow or Red** by the **Client Health Score** (specifically low ESS or low FUS) and all Enterprise-level priority accounts.

VP presence reinforces the **Trusted Partnership** vision by shifting the conversation from "what is wrong" to "how Abre provides value."

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Leadership & Governance

THE FOUR PILLARS OF LEADERSHIP: OUR CULTURE OF ACCOUNTABILITY

Systemic Ownership

Root Cause Rigor. We own the problem until the technical or process gap is closed. Our managers spend time in the **agent desktop (the gemba)**, observing firsthand friction.

Unbreakable Alignment

Partnership Orchestration. We are the bridge across all matrixed partners (Sales, Product, Technical Services). We act as chief translators.

Impact Obsession

Measurable Results. Every project, meeting, and action should have a **validated Key Result (KR)** tied to a financial or strategic outcome.

Smart Bets & Risk Mitigation

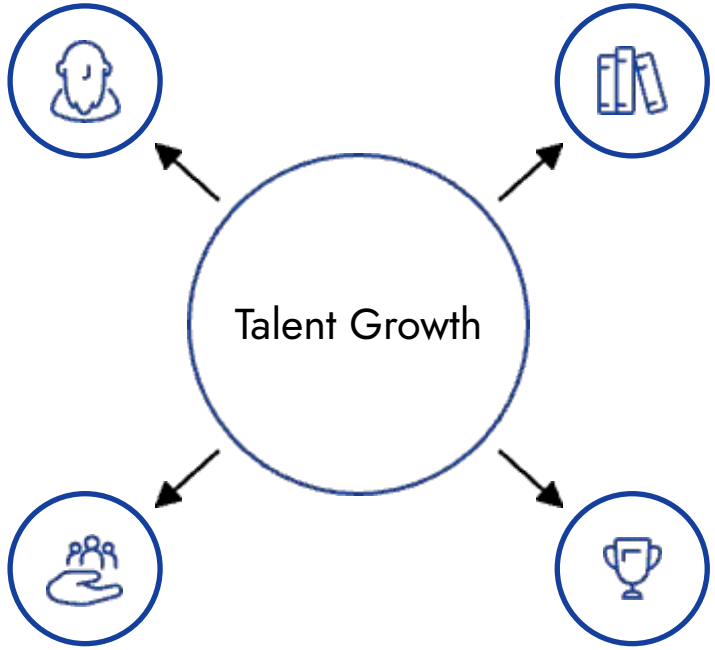
Innovation & Stability. We encourage entrepreneurial thinking, and taking risks, while rigorously protecting core stability.

Leadership & Governance

TALENT ELEVATION & EXECUTION RHYTHM

Cross-Functional Mentorship:

Formal program pairing high-potential CSMs/ICs with senior leaders from **Product, Sales, or Technical Services** to break down silos and gain the strategic context needed for **Unbreakable Alignment**.



Personal Learning Objectives:

Continuous growth is a **measurable accountability**. Managers must set quarterly goals focused on **Technical Depth** (e.g., SIS integration expertise), **Strategic Breadth** (e.g., district budget cycles), or **People Leadership** (e.g., mentorship completion).

Performance Management:

Performance is reviewed quarterly, tied directly to achieving quantifiable KR targets and team **KPIs**. The process is transparent and metric-based on a "no surprises-approach". The CSM also receives regular career coaching conversations in order to plan next steps in their career.

Quarterly Pillar Awards:

Visible recognition for individuals who exemplify the traits of the four pillars, reinforcing the desired culture and rewarding impact.

Leadership & Governance