INTRODUCTION AND BACKGROUND

THE CUSTOMER LIFECYCLE MANAGEMENT PROCESS
The success of the Creative Cloud subscription model relies on the effective use of a Customer Lifecycle Management (CLM) process. That process is critical to strengthening our relationship with the customer, and the strength of that relationship influences their decision to retain, grow, and renew their membership.

The CLM process has four key stages. This training module will concentrate on the Nurture and Educate stage.

<table>
<thead>
<tr>
<th>DEPLOYMENT</th>
<th>NURTURE &amp; EDUCATE</th>
<th>GROWTH &amp; EXPANSION</th>
<th>RENEWAL</th>
</tr>
</thead>
<tbody>
<tr>
<td>(0-60 days)</td>
<td>(60-120 days)</td>
<td>(120-210 days)</td>
<td>(275-395 days)</td>
</tr>
</tbody>
</table>

PURPOSE AND OBJECTIVES OF A NURTURE & EDUCATE CALL
The primary purpose of a Nurture & Educate call is to help the customer maximize the value of their purchase and get more use out of their Creative Cloud licenses. To achieve that target, the CSAM agent will:

- Determine if the customer has deployed all of his or her licenses (Creative Cloud for teams and Adobe Stock licenses).
- If deployment, downloads, or active usage are low, determine the cause for this and address it.
- Reinforce a relationship of trust between the CSAM agent and the customer.
- If the customer purchased through Digital River, ensure there are no billing or invoice issues.
NUMBER OF NURTURE AND EDUCATE CALLS
The number of attempts the CSAM agent will make to contact the customer depends on the size of the customer’s account.

Larger accounts (10 or more licenses): 5 call attempts and 2 emails (see email templates)
Smaller accounts (less than 10 licenses): 2 call attempts and 2 emails (see email templates)

CUSTOMER PROFILE
CSAMs will call small to mid-sized business who have purchased a new Creative Cloud for teams membership or added new licenses (“seats”) to an existing CCT license.

These customers may be enrolled in Adobe’s VIP program, either through an Adobe phone sales agent or a reseller. Some may have purchased their CCT subscription without a VIP membership (such as through Adobe.com or a phone sales agent placing their order in Hendrix). Consult your local trainer or supervisor for details on the types of leads you will contact.

The list of customers to contact will be screened so as not to include:
1. Customers of named Enterprise accounts
2. Customers identified for the VIP Migration team

The CSAMs will contact direct customers and the customers of non-managed channel partners in order to build a relationship of trust with them and ensure they have a positive experience with their subscriptions. Eventually, we will also contact customers of Managed Partners.

Continued on next page
CALL FLOW
For a high-level overview of the call process, refer to the CSAM Nurture & Educate Call Workflow Diagram. A preview is provided here for quick reference. Each of the major steps of the flow chart correspond to a section of this call guide. Refer to these sections for detailed procedures for each step.

Continued on next page
PRIORITIZING LEADS

Nurture & Educate calls will be triggered on day 62 of the post-sales cycle. Your Gainsight cockpit will notify you when these customers are to be contacted. Prioritize the sequence of customers to call according to this ranking:

1. Customers with low deployment
2. Customers with a low number of downloads
3. Customers with low active use
4. Customers with good deployment, downloads, and usage

PREPARING TO CALL

Before calling, the CSAM agent should identify some basic customer information and do some research on the customer’s deployment, downloads, and active use of their subscription. But the CSAM agent should be very careful not to reveal to the customer how much of this information they have. Telling a customer that we can see what they have downloaded and which applications they are using can damage trust and give the customer the impression we are spying on them.

Instead, the agent should use this information to prioritize their calls and to know which questions to ask when guiding the conversation. Suggested talking points are provided in this guide.

Continued on next page
STEP 3: OPEN THE CALL

When introducing yourself to the customer, be sure to make it clear that you are calling from Adobe. We do not want the customer to have the impression we are calling on behalf of their reseller (if they have one). Using the suggested scripting in this section will accomplish this.

FINDING THE CONTACT

**Tip:** To get the contact on the phone or to call you back, it is generally best not to give out too much information about the nature of the call. If the contact or the gatekeeper knows the specific reason for the call, it significantly decreases the chances of them calling you back. Notice how the scripting below intentionally leaves vague the specific purpose of the call.

<table>
<thead>
<tr>
<th>OUTCOME</th>
<th>ACTION</th>
</tr>
</thead>
</table>
| CSAM agent is directed to customer’s voicemail | **SUGGESTED CALL SCRIPTING**
  “Mr/Ms Customer, this is [insert name] calling from Adobe. This is regarding your Creative Cloud for teams subscription. Please call me back at [insert name].” |
| CSAM agent gets a gatekeeper on the phone     | **SUGGESTED CALL SCRIPTING**
  “This is [insert name] calling from Adobe. This is regarding his/her Creative Cloud for teams license. May I speak to him/her please?” |
| CSAM agent gets the desired customer contact on the phone | Once you are speaking to the contact, use this opportunity to remind the customer that you are their Customer Success Account Manager.
  **SUGGESTED CALL SCRIPTING**
  “Good morning/afternoon, Mr/Ms Customer. This is [insert name], your Customer Success Account Manager from Adobe. How are you today?” |

*Continued on next page*
<table>
<thead>
<tr>
<th>IF...</th>
<th>THEN...</th>
</tr>
</thead>
<tbody>
<tr>
<td>The customer has not yet deployed all of their licenses</td>
<td>Determine why the customer has not yet deployed all of their licenses. The most important goal is to get your customer to deploy 100% of their purchased licenses. Without doing so, they are unlikely to grow or renew their order. If they have not deployed due to technical reasons, provide them with the Advanced Technical Support number for their region and strongly encourage them to call it for deployment assistance.</td>
</tr>
</tbody>
</table>
### IF...

The customer has deployed their licenses but downloads or usage is low

### THEN...

1. If you are not doing so already, attempt to speak with the head of the creative end-users, such as the Marketing Manager or Creative Director. Speaking to an IT Manager about usage will not increase usage; you must speak to the manager of the end-users.

2. Once you are speaking to the creative manager, determine why the end-users are not downloading or using the software.

**IMPORTANT:** Asking about downloads or usage must be done so as not to give the impression that we track these things, otherwise it may make the customer uncomfortable. The objective is to use a leading question to get the customer to talk about their downloads and usage. One way to do that is this:

**Suggested Scripting:** “Mr./Ms. Customer, may I ask which applications your team is using and what they do with them?”

3. Depending on what the manager tells you, point out the key benefits they may be missing. Some options include:

**Creative Cloud Libraries, CreativeSync, and Collaboration**
- Links desktop and mobile apps
- Share creative assets and tools including images, shapes, colors, text styles, and settings across all team members and devices

**1-on-1 Expert Support Services**
- Two one-on-one sessions per team member per year
- Live “how-to” training by phone; not just installation help

**Integration with Adobe Stock and Typekit**
- **Stock:** Over 60 million royalty-free, high-quality graphics, photos, and videos
- **Typekit:** Find exactly the right font for your designs.
- Access both through the Creative Cloud desktop interface.

**Creative Community: Behance and Portfolio**
- Access both through the Creative Cloud desktop interface.
- Get inspiration from others
- Showcase your work
- Connect with a larger creative community
### IF…

<table>
<thead>
<tr>
<th>Deployments, downloads, and usage are all good</th>
<th>THEN…</th>
</tr>
</thead>
<tbody>
<tr>
<td>1. Use this call to keep in contact with the customer and check on their satisfaction with Creative Cloud for teams.</td>
<td></td>
</tr>
<tr>
<td>2. Ask about the customer’s satisfaction. <strong>Suggested Scripting:</strong> “Have you been happy with your Creative Cloud licenses so far?” Listen to the customer’s response and address any concerns they may have.</td>
<td></td>
</tr>
<tr>
<td>3. Remind the customer about Expert Services, if needed. <strong>Suggested Scripting:</strong> “If your team needs any help using the latest features, don’t forget about our dedicated one-on-one expert support sessions, where a specialist will walk your team through how to use anything they might be unfamiliar with.”</td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>The customer’s order was processed through Digital River</th>
<th>THEN…</th>
</tr>
</thead>
<tbody>
<tr>
<td>1. Determine if the customer has paid their invoice yet.</td>
<td></td>
</tr>
<tr>
<td>2. If not, ask the customer if they have received their invoice and if they have any questions about it.</td>
<td></td>
</tr>
<tr>
<td>3. Politely remind them to make their payment to Digital River, not Adobe.</td>
<td></td>
</tr>
</tbody>
</table>

*Continued on next page*
STEP 4: CLOSE THE CALL

SUGGESTED CALL SCRIPTING

Mr./Ms. Customer, I’d like to thank you for your business. As your personal Customer Success Account Manager, if there is anything I can do to help you get more out of your membership, please call me at [insert phone number] and you can just ask for me, [insert your name]. Have a great day.”