THE PROACTIVE POST-SALE PLAYBOOK

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A Step-by-Step Guide to Build Trust, Drive Adoption & Reduce Churn

Introduction

This playbook helps Customer Success, Enablement, and Post-Sales teams shift from reactive support to proactive partnership.
When you consistently deliver non-asked outputs — unexpected but deeply helpful resources — you:

- Build stronger relationships with champions
- Reduce the friction of adoption
- Make expansion and renewal conversations easier

"Start with one. Just one non-asked output that makes your customer say: damn, that was helpful."

How to Use This Worksheet

This guide is designed to be practical, repeatable, and fast to execute. You don't need a full enablement team to get started — just a bias toward action.

1. **Work Through It Sequentially**: Each step builds on the last — start with one customer or use case.
2. **Use It As a Launchpad**: Treat it like a briefing doc. Use the templates to brainstorm and execute one proactive action per customer.
3. **Share & Scale**: Once you've delivered a few NOWs (Non-Asked Outputs), you can templatize them to share with your team or reuse across accounts.
4. **Return Often**: Make this your go-to guide anytime you're:

- Kicking off a new customer
- Trying to revive a quiet account
- Preparing for a renewal or QBR

Step 1: Identify the "Moment That Matters"

Objective:
Pinpoint where your customer is most likely to get stuck, feel overwhelmed, or delay adoption.

Action:
- Review your sales notes, call recordings, or CS handoff briefs.
- Ask: What initiative is the customer trying to achieve?
- Identify the first key workflow or milestone they must hit.

Worksheet:

Initiative/Pain Point	Workflow at Risk	Owner (Customer)	Deadline

Step 2: Create a Non-Asked Output (NOW)

Objective:
Design a resource or deliverable the customer didn't ask for — but will love.

Action:
Choose your NOW format:
- A starter template
- A guided walkthrough (e.g. Loom video, iorad tutorial)
- A mini strategy brief ("Here's how 3 companies like yours did it")
- A metrics snapshot or early insights

Template:

Customer Initiative	Type of Output	Format	CTA/Next Step

Step 3: Deliver It Thoughtfully

Objectives

Deliver your NOW with empathy and clarity — no strings attached.

Message Template:

"Hey [Name], I know you're juggling a lot as you roll out [X]. Based on what you shared, I went ahead and pulled this together — might save you a few hours. Let me know if it's helpful or if we should tweak it."

Attach or link your output and include a light suggestion for what to do next.

Step 4: Track the Impact

Objective:

Measure which NOWs resonate so you can build a library and scale.

Metrics to monitor:

- Did they respond or thank you?
- Did they share it internally?
- Did they complete the suggested next step?
- Did you unlock a new stakeholder or use case?

Tracker:

Customer	NOW Sent	Response	Impact	Follow-up

BONUS: 10 Non-Asked Outputs You Can Build Today

1. Pre-filled training plan for their onboarding
2. Custom adoption checklist for their top use case
3. 3-minute Loom: "Here's how I'd use this for [their scenario]"
4. Template: ROI calculator based on their goals
5. One-pager: How their peers used your product to hit similar metrics
6. Early win report: Initial usage insights + tips
7. PDF: "5 Mistakes to Avoid When Rolling Out [Your Tool]"
8. Prebuilt dashboard layout or view
9. Email draft they can send to internal stakeholders
10. Personalized AI prompt library based on their role