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Engaging with Customer Success to Unlock the Full Value of Euna Procurement

Eunaverse 2025

Mat Wood: Manager CS, Procurement

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About Me

- **Role:** Manager, Customer Success – Euna Procurement
- **Location:** Halifax, Nova Scotia
- **Career Journey:**
  o Grant Thornton – National Operations
  o Castle Hall – Operational Due Diligence
  o BeyondTrust – Customer Experience
  o Avanti Software – Customer Success
  o Collectors Universe – Launched Canadian Division
  o **Euna Solutions** – Customer Success

- **Focus:** Retention • Adoption • Long-term client outcomes
- **Personal:** Dad adventures!

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Euna Procurement – Customer Success Team

Misha
Customer Success Manager

Ayo A.
Customer Success Manager

Miranda
Customer Success Manager

Dorothy
Sr. Customer Success Manager

Audra
Customer Success Manager

Justin
Customer Success Manager

Ayo I.
Customer Success Manager

Claire
Customer Success Manager

Chaya
Customer Success Manager

Hafsa
Customer Success Manager

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Question:

Raise your hands if you've ever had software you weren't using to its full potential?

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How We Fit With Other Teams

Support

- Reactive Help Desk
- Solves issues as they arise
- Ticket based processes

Access via support.bonfire@eunasolutions.com

Customer Success

- Proactive Guidance & Strategy
- Drives Adoption & Long Term Value
- Your Internal Advocate at Euna

Account Management

- Helps Expansion if Needs Grow
- Ensures License/Module Alignment
- Pricing & Terms

Please coordinate with your CSM to connect with your AM

Professional Services

- Leads Implementation
- Delivers Custom Training Projects
- Time-Bound Project Based Work.

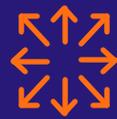*Please coordinate with your AM to connect with the Proserv team*

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The 3 Pillars of CS

Customer Success is your partner

Guide

- Share best practices & adoption tips
- Strategic initiative planning tied to your goals.
- Introduce & encourage use of new features
- Benchmark you against your peers & industry standards

Assist

- Connect you to the right resources and teams
- Facilitate escalations so issues don't stall progress
- Provide guidance for your staff
- Act as a bridge between you and other Euna departments

Advocate

- Capture and channel your feedback to product
- Push for process improvements on your behalf
- Help tell your success stories internally & externally
- Represent your needs during roadmap & strategy conversations

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Executive Business Reviews

- Structured quarterly check-ins

- Review usage, adoption, and ROI

- Align on goals & upcoming priorities

- Capture feedback to influence roadmap

- *"What **business goals** does our product help you accomplish?"*

- *"Are there **any roadblocks** preventing you from achieving your goals?"*

Introductions (5 mins)
- Meet the Team
- Confirming Contacts & Roles

System Overview (3 mins)
- System Setup
- Usage Statistics

Goals & Objectives (10 mins)
- Outcomes review
- Looking ahead to future goals

Customer Experience Discussion (20 mins)
- Successes
- Challenges

Company Highlights (5 mins)
- Euna Roadmap
- Customer & Industry Events

Success Plan (7 mins)
- Objective and Success Plan summary

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Monthly Highlights & Updates

- Share new features & roadmap opportunities (like beta tests)

- Provide practical tips & tricks to save time

- Customer resources

- Keep your team informed & connected

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Why Engage Early

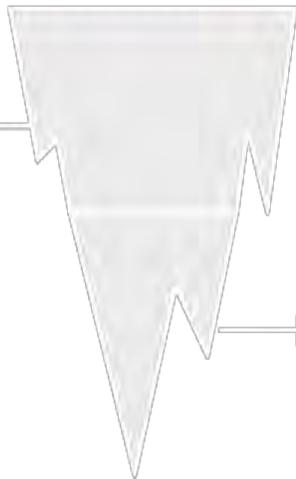## Addressing Problems Early Prevents Larger Issues.

Visible Problems

Small, apparent issues.

Underlying Causes

Hidden reasons behind visible problems.

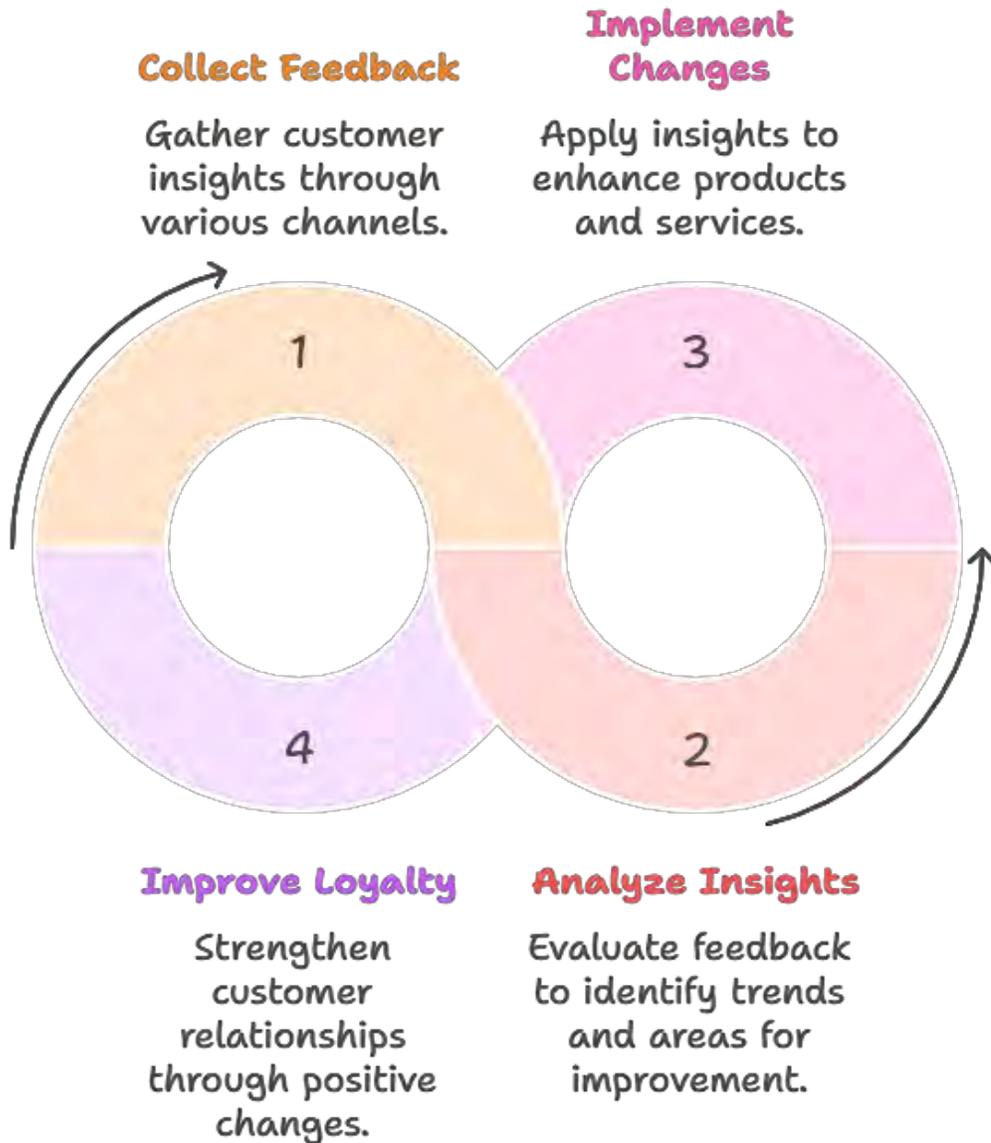**Hidden Consequences**

Unseen effects of unresolved issues.

- **Problems don't age well**
- **Small concerns are solved quickly**
- **Faster fixes = less frustration**
- **Early conversations strengthen partnerships**

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Question

What would make your experience with Customer Success even more valuable in the next 6–12 months?

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The Feedback Cycle

Collect Feedback

Gather customer insights through various channels.

1

Implement Changes

Apply insights to enhance products and services.

3

Improve Loyalty

Strengthen customer relationships through positive changes.

4

Analyze Insights

Evaluate feedback to identify trends and areas for improvement.

2

Made with Napkin

Feedback is Gold

- **All feedback is valuable**
- **Positive ---> Reinforces work**
- **Constructive ---> Drives improvements**
- **Your voice ---> Shapes product & services**

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Resources Available to You

- Euna Academy
- Knowledge Base
- Webinars
  - o Next session Sept 11th – Euna Procurement best practices
- Support: support.bonfire@eunasolutions.com

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Let's Stay Connected!

- I want to hear from you!
  - o Email: mat.wood@eunasolutions.com
  - o Phone: 1(844) 226-3862 ext. 144

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Thank you!

Let's reach for the stars!