

S  
U  
C  
C  
E  
S  
S



EMPOWER



N  
E  
T  
W  
O  
R  
K

erm • project risk mgmt • bcr • health & safety • rmis • claims admin • esg • iprm • compliance • policy mgmt • internal audit

**RISK** UNDER  
**ONE ROOF**

# The Customer Success Framework

**Sandi Adkins**

*Sr. Claims Manager, Schneider National*

**Kimberly Gould**

*Vice President, Risk Finance, Marriott*

**John Shaw**

*SVP Customer Success, Riskonnect*

**RISK** UNDER  
**ONE ROOF**

*Confidential*



# Agenda

- Key Initiatives (10 Min)
  - Customer Success Snapshot
  - Riskonnect Services & Support
  - Customer Health Snapshot
- Success Framework Discussion (30 Minutes)

# Riskconnect Customer Success



Jenny Nelson  
Vice President



Marci Reynolds  
Vice President



Robert Garrett  
Director



Angie Trygestad  
Director



Lindi Goodwin  
Director

## Success Management

Partner with your CSM to get the move value from our relationship.

## Services & Support

Ongoing technical support for your Riskconnect Solutions.

## Training

Training on Riskconnect applications.

## Adoption Services

Detailed analytics and advisory on how to drive adoption of Riskconnect solutions.

## Success Operations

Obsessively capturing data about customer experience for continuous improvement.





# What can we help you with?



## Riskconnect Success Portal

CREATE A CASE



VIEW CASES



RUN DASHBOARDS



MY CUSTOMER HEALTH SC...



EVENTS AND WEBINARS



KNOWLEDGE LIBRARY



SUBMIT PRODUCT IDEA



SUBMIT PORTAL IDEA

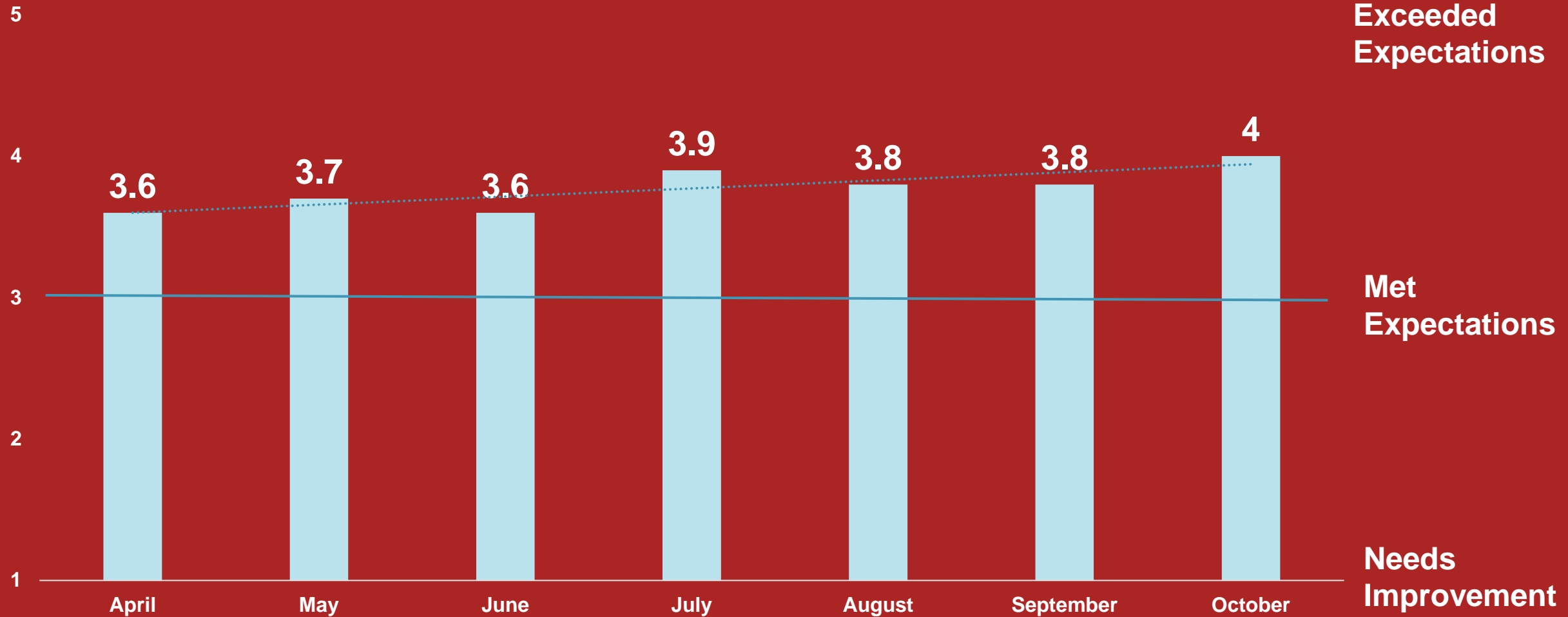


### PORTAL ANNOUNCEMENT

Learn more about Riskconnect's product roadmap. [Click here](#) to view Kathryn Carlson, our SVP of Product Management.

REQUEST TDD

# Case Survey Trends



# Customer Health Score 3-year Trend



# The Perfect Five Club

Customer	Success Manager	Account Exec	Services & Support
1. Sustainable Cane Sugar Refinery Operation	Tyler Mullins	Scott Miller	
2. Leading Operator & Franchisor of Full-Service Restaurants	Nicole Romani	Blake Legate	Tim Fusco
3. Large Integrated Pediatric Health System	Chris Pratt	Derek Rich	Joy Carlton
4. 150-Bed Regional Medical Center	Chris Pratt	Derek Rich	
5. Fortune 500 Financial Institution	Maren Crisanti	Leslie Mosely	Wes Loflin
6. Global Provider of Integrated Energy Systems	Tyler Mullins	Scott Miller	
7. Fortune 500 Data Storage Company	Paula Muncy	Scott Miller	
8. Comprehensive Vegetation Management Company	Wayne Bernier	Chris Holland	Alicja Jastrzebski
9. Renowned Network of Acute-Care and Teaching Hospitals	Chris Pratt	Derek Rich	Jemal Davis
10. A County Government in Florida	Jani Polk	Andrew Baird	
11. National Leader in Home Hospice, Health & Personal Care	Chris Pratt	Derek Rich	
12. Energy-Related Holding Company	Wayne Bernier	Beth Fitzpatrick	

 *Technical Support provided across the Customer Care and Success Services team.*



# The Perfect Five Club

Customer	Success Manager	Account Exec	Services & Support
13. Transportation & Logistics Provider	Wayne Bernier	Leslie Mosley	Jemal Davis
14. Operator of Delivery Kitchens, Logistics & Proximity Hubs	Wayne Bernier	Adam Dirkes	
15. Privately Held U.S. Based LTL Carrier	Paula Muncy	Beth Fitzpatrick	
16. Large Natural Gas and Electric Company	Chris Fisher	Mike Kelley	
17. Fortune 500 U.S. based Airline	Debra Lyerson	Scott Miller	
18. Fortune 100 Multinational Conglomerate	Wayne Bernier	Mike Kelley	Betsy St. Germain
19. UK Based Rail Freight and Logistics Company	Liz Moses	Derek McGee	Elif Ozkol
20. Global Public Transport Operator	Suzan Curda	Chris Holland	
21. Fortune 1000 Mfg. of Electrical & Electronic Products	Suzan Curda	Scott Miler	Gitika Haran
22. Property & Casualty Insurance Provider	Sue Sikora	Sue Sikora	Joshua Kaufman
23. Fortune 500 U.S. Based Investment & Insurance Company	Susan Curda	Stuart Purdy	
24. Premier Maritime Claims Adjusting Firm	Keith Wisniewski	Mike Kelly	Erik Halaj



*Technical Support provided across the Customer Care and Success Services team.*



# The Perfect Five Club

Customer	Success Manager	Account Exec	Services & Support
25. A Florida County Public Transit Authority	Chris Fisher	Beth Fitzpatrick	
26. Casino & Motel Operator	Chris Fisher	Chris Holland	
27. Federally Recognized Indian Tribe Casino Support Org.	Debra Lyerson	Blake Legate	Thomas Bruce
28. U.K. Based Building Society	Ilka McHugh	James Hall	
29. County Government in California	Lisa McDaniel	Adam Dirkes	
30. Tennessee Based Correction & Detentions Org.	Chris Fisher	Mike Kelly	
31. Fortune 500 Membership Based Wholesale Club	Jani Polk	Blake Legate	Shil Patel
32. A City Government in Arizona	Stacy Long	Adam Dirkes	Yash Rajababoo
33. American Convenience Store Chain	Jani Polk	Mike Kelly	
34. Fortune 500 US Based Airline (A Second One)	Katie Burke	Beth Fitzpatrick	Joshua Kaufman
35. Privately Owned Construction Aggregate Company	Tyler Mullins	Beth Fitzpatrick	
36. Fortune 500 Premier Claims Services Providers	Katie Burke	Stuart Purdy	Ryan Swanson



*Technical Support provided across the Customer Care and Success Services team.*



# Success Framework Discussion

# Success Framework



- ✓ **Success Plan:** What are YOU trying to achieve in your organization?
- ✓ **Adoption Assessments:** Are your system users supporting that goal?
- ✓ **Value Roadmap:** What is next up in our plan to drive success?
- ✓ **Health Model:** Is everything working together properly to achieve that success plan?

# SPECIAL GUESTS!!



**Sandra Adkins**  
*Senior Claims Manager, Schneider*



**RISK** UNDER  
**ONE ROOF**



# SPECIAL GUESTS!!



**Kimberly Gould**

*VP, Claims Finance, Marriott International*



**RISK** UNDER  
ONE **ROOF**



# Success Framework



- ✓ **Success Plan:** What are YOU trying to achieve in your organization?
- ✓ **Adoption Assessments:** Are your system users supporting that goal?
- ✓ **Value Roadmap:** What is next up in our plan to drive success?
- ✓ **Health Model:** Is everything working together properly to achieve that success plan?



# Connect with us.



**Kimberly Gould**

**e: enter your email**

**t: enter your telephone**

**w: enter your website**

 **LI name**

 **Twitter @**

 **Podcast name**



**Sandra Adkins**

**e: enter your email**

**t: enter your telephone**

**w: enter your website**

 **LI name**

 **Twitter @**

 **Podcast name**



**John Shaw**

**e: john.shaw@riskconnect.com**

**t: 610-909-2643**

**w: www.Riskconnect.com**

 **johnryanshaw**

 **Twitter @ Johnryanshaw**

S  
U  
C  
C  
E  
S  
S



EMPOWER



N  
E  
T  
W  
O  
R  
K

erm • project risk mgmt • bcr • health & safety • rmis • claims admin • esg • iprm • compliance • policy mgmt • internal audit

**RISK** UNDER  
**ONE ROOF**