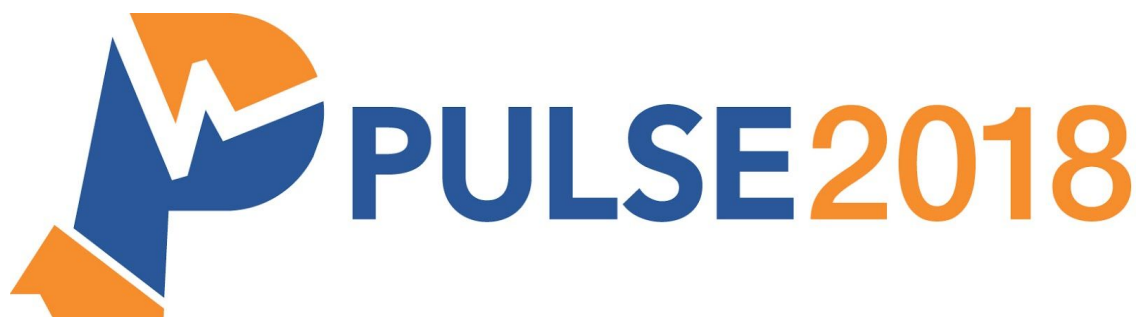


# **SPEAKER HANDBOOK**

**Executive Symposium: Taking Customer  
Success Beyond CSM**

**April 10-11, 2018  
San Mateo, CA**



Thank you for agreeing to speak at Pulse 2018. We are moving to San Mateo for this year's program and it is going to be even bigger than last year!

This Speaker Handbook is designed to give you the list of deliverables and deadlines for your presentation. It also includes a link to our presentation template and other tips to make your participation a success.

The entire Gainsight team appreciates you taking the time to share your passion and expertise at Pulse.

Don't hesitate to contact us if you have any questions.

Best regards,  
The Pulse Team  
[pulse@gainsight.com](mailto:pulse@gainsight.com)

**Pulse 2018 Program Director**  
Andrea O'Connor  
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**Pulse 2018 Speaker Contact**  
Elena Hanson  
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## Timeline of Deliverables

Below you will find the timeline for the presentation development process. We ask all speakers to work within this timeline to ensure adequate preparation and collection of presentation material. Our team is here to assist you in the development of your presentation.

Elena Hanson ([speakers@gainsightevents.com](mailto:speakers@gainsightevents.com)) is the point person for managing the timeline and production aspects of your presentation and associated materials.

Description	Due Date
<a href="#">Speaker Release Form</a> <i>Please sign &amp; return this form which gives us permission to photograph and/or video record your session</i>	Now
Complete our <a href="#">Speaker Onboarding Form</a>	Now
Send headshot for use in the Pulse 2018 mobile app <i>Prefer jpg or png files - minimum 300 dpi</i>	Now
Download the Pulse 2018 presentation <a href="#">PowerPoint template</a> or <a href="#">Keynote template</a>	Now
Speaker Prep Calls <i>Your Session Owner will schedule as needed.</i>	Week of March 12th
First presentation draft due <i>Gainsight content team will review &amp; send comments back to you for approval.</i>	March 20, 2018
Session Rehearsals <i>Virtual Rehearsals with Nick Mehta, CEO of Gainsight</i>	Week of March 19th and March 26th
Final presentation due	April 2, 2018

## Pulse 2018 Location:

San Mateo County Event Center  
1346 Saratoga Drive  
San Mateo, CA 94403

## Pulse 2018 Agenda

The detailed program and schedule of events can be found on the [Pulse 2018 website](#).

## How to Register

The Gainsight Team will take responsibility for registering you as a Speaker for Pulse 2018. Once your registration is complete, you will receive a registration confirmation email from our registration system. If you have not received a registration confirmation, please contact Elena Hanson at [speakers@gainsightevents.com](mailto:speakers@gainsightevents.com).

## Track Information

- Track Name: **Customer Success Beyond CSM**
- Day: Tuesday, April 10th and Wednesday, April 11th
- Track Leader:
  - Name: Mike Berger
  - Email: [mberger@gainsight.com](mailto:mberger@gainsight.com)
  - Cell: 650-425-0791

## Track Agenda

Day	Time	Session
Tues 4/10	11:15 AM - 11:30 AM	<b>Why Customer Success is More Powerful Than Just CSM Alone</b> Laura Sweetman, ServiceSource Mike Berger, Gainsight
Tues 4/10	11:30 AM - 12:00 PM	<b>BCG Findings on Customer Success Benchmarks</b>

		Meinrad Heuberger, Boston Consulting Group Phillip Anderson, Boston Consulting Group Scott Golden, Gainsight
Tues 4/10	12:15 PM - 12:45 PM	<b>Are You Getting the Results You Want Out of Customer Success?</b> David Hwang, ServiceSource
Tues 4/10	1:00 PM - 1:45 PM	<b>Scaling Customer Success Through Channel Partners</b> Shawn Santos, ServiceSource Ed Daly, Cisco Simon Tucker, Anaplan Guilherme Lopes, Resultados Digitals
Tues 4/10	2:00 PM - 2:45 PM	<b>Great Debate: Who Owns the Recurring Revenue Number, Sales or CSM?</b> Ben Jennings, ServiceSource Mark Friedman, Genesys Stephanie Brener, Box Rachel Kjos, JAMF
Tues 4/10	3:00 PM - 3:45 PM	<b>The Customer Growth Stack: How Successful Customers Drive Exponential Growth</b> Josh Horstmann, SBI Carlos Gonzalez, Ceridian Addy Clark, FinancialForce Susan Berg, SAP Concur
Wed 4/11	11:05 AM - 11:20 AM	<b>ServiceSource Keynote</b> Ben Jennings, ServiceSource
Wed 4/11	11:20 AM - 11:50 AM	<b>Evolution of Services: Optimizing for Customer Success and Business Performance</b> Lucy Norris, Genesys Paul Feicht, GHX Laryssa D'Alama, Resultados Digitals Saood Shah, Gainsight
Wed 4/11	12:15 PM - 12:45 PM	<b>Customer Success Around the Globe Lunch &amp; Learn</b> Dan Steinman, Gainsight Lilian Klemz, Resultados Digitals

		Hiroko Otsu, Success Lab Inc. Christina Georgoulaki, Typeform
Wed 4/11	12:50 PM - 1:35 PM	<b>CS = CO+CX: Why Your CX Strategy MUST Deliver Customer Outcomes</b> Steve Bernstein, Waypoint Group Paul Herdman, NICE InContact Roelf Kuitse, Imprivata Omer Rabin, WalkMe
Wed 4/11	1:50 PM - 2:35 PM	<b>Use CS Operations to Build Jet Packs for Your CSMs, Saving them Time and Effort</b> Kim Cervenka, SAP Concur Seth Wylie, InsightSquared Richard Hodges, Genesys Samee Lieber-Dembo
Wed 4/11	2:50 PM - 3:35 PM	<b>Partnering with IT for Long Term Success</b> Ian Murray, Cisco Ricardo Craft, ServiceSource Karl Mosgofian, Gainsight

## Tech Checks

There will not be any formal tech checks scheduled for Pulse, but you are more than welcome to drop by your session room to take a look at your stage and setup.

## Presentation Template

We have created two presentation templates for Pulse 2018, one for PowerPoint and one for Keynote. These templates match the overall design and look you'll see throughout the event this year. Depending on your preference, please work in one of these two templates.

Download the PowerPoint presentation template [here](#).

Download the Keynote presentation template [here](#).

## Mindset

- **Tear up every talk** you've done on your topic and start fresh. With the experience you have, what would you present TODAY...and how?
- **Prepare.** We know you're an expert, but we want you to prepare for this talk/topic in this moment in time. Have enough familiarity with the content for minimal reliance on notes.
- **Find your WHY.** Why are you doing this talk or participating in this panel? Maybe you want to raise the profile of you and your company. Okay. But see if you can identify a meaningful purpose at a deeper level for you. That clarity of purpose will make you and your talk more connected and engaging.
- **Get real.** This is a business conference. We get that, but we want authenticity, candor and vulnerability to be a part of every talk. Why? Because emotionally connected talks deliver a better experience to audiences.
- **Deliver at least Two "Uppercuts"** (big standalone takeaways) **and one "Juke"** (hey, I didn't expect that!).
- **Don't over-promote your company:** There's no better way to under-promote your company than to use your session to sell.

## Structure and format

- At the start, find out who is in your audience and see where you can tie examples or portions of your talk to issues that might relate to audience members.
- The most compelling talks are comprised of a relatable problem and a non-obvious solution (props [@unicorn](#)).
- Use real-life examples. If it's appropriate for your topic, consider sessions that feel like "working sessions" or "workshops" where you're teaching while the audience is "doing" right along with you.

## Content

- Be sure your content matches the title and description of your talk in the conference program. If not, talk to your speaker coordinator and find a way to get these in sync.
- People like drama. Take a problem or a big question, and then tell a story about it.
- Be controversial and provocative, but back it up.
- Here are a few templates for an arc for your talk (hat tip [@randfishkin](#)):
  - Make your presentation a narrative story the whole way through, with lessons along the way and content, evidence, examples, and use cases to punctuate.
  - Tell a powerful story in the beginning—break for a list of tactics—then return to the story in the end.
  - Make a list starting and ending with your two strongest points.
  - Use an emotional or funny analogy that ties your content together.
- Give practical, actionable advice and takeaways: Minimum two actionable things audience members can deploy in their own work the day after Pulse.

- Use current, real-life examples, particularly those that are relevant to your audience; be flexible and adapt where you can to who shows up.
- Remember that you may be in deep detail on your specific angle on a topic or your specific industry/sector. Pay attention to this possibility, and be sure to abstract your points to something more universal/relatable to your audience.
- The Pareto Principle applies. 80% of the value in your talk will come from 20% of your talk. Edit well and make space for your most critical points.

## Visuals

- Use a professional designer. No joke.
- Make 1-2 points max per slide. Minimum font size of 25pt in Powerpoint
- More slides faster, create animations and dynamism
- Vary slide cadence
- Match slides to your tone, emotion, and content
- Use the slides to amplify not distract from you
- Feature real-life examples of your points: dashboards, scorecards, screenshots
- Keep fonts and colors consistent but not monotonous
- Use authentic imagery. Avoid obvious stock photography
- Bleed photos to slide edges for maximum visual impact. No 1990s style powerpoint collages.
- Show your twitter handle and conference hashtag (#pulse2018) on slides

## Delivery and Presence

- Again, be authentic, vulnerable, empathetic, and relatable.
- Talk about at least one *real* failure/miss and what you learned.
- Bring your best energy, leave everything on the field.
- Avoid repetitive motion; move intentionally.
- Stick around if you can after the session to field more questions.
- Leave space for improvisation based on how the session goes; people like the experience of seeing you react to something on the fly.
- Humor, charisma, and passion matter. Balance authentic emotion or rigor. If you're usually high energy, low substance, push yourself the other way and vice versa.

## Audience Engagement

- Use Slido for real-time audience feedback.
- Engage your audience in an issue in other ways: search something on their phones, brainstorm ideas to a problem/issue you offer, involve them.
- Tell audience how you want questions: as you go, at the end? Allow 20-25% of your session time for questions.
- Repeat audience questions.



- Answer the EXACT question that is asked. Practice active listening during Q&A: “What I heard you ask is....”
- Give quick answers to questions to allow for more questions.

## Specifics for Panels

- Moderators:
  - Great panels depend on great moderators. It’s your job to keep reading the energy of the panel, find opportunities to raise up a weak or dull panel. Bring empathy and timing. Interject when you raise the bar and be quiet when things are going well without you.
  - Pump up the audience about the speakers, topic, etc.
  - Listen and react from presence vs. rote/script.
  - Engender civil conflict and disagreement; moderator ought not “over-respect” the panelists.
  - Consider a “debate” format with one or more topics and an understanding that different panel members have different perspectives.
  - Catch speakers on tangents and bring them back.
- Speakers
  - Stick to brief answers for more back and forth across the panel.
  - Don’t agree with someone at length. Say “plus one” or nothing. Jump in when you have a *different* view from the prior speaker.
- Both
  - Listen consciously: Both moderator and panelists can find chances for real-time reactions to things that are said.
  - Avoid “Dry panels”—predictable and repetitive practices where one question is asked, speakers respond in same order. Vary questions, vary order, ask targeted questions that are perfect for each individual speaker.

## AV Set-up

Each breakout room will be equipped with the following items:

- Master computer to run your presentation.  
*Please do not plan to run your presentation off of your own computer. We will have the presentations pre-loaded on the master computer.*
  - If you plan to use notes, please have them printed out.
- Stage
- Projector & screen

- Confidence Monitor
- Podium
- Sound equipment and microphones
  - 1 lavalier mic, 4 handheld mics, and a podium mic
- Speaker Timer
- Slide Advancer
- Audience QA and live polling available through [Slido](#).

If you need any other AV equipment not listed above, please let us know.

We will have technical support in each breakout room to ensure your presentation runs smoothly.