How to Create Playbooks

Gainsight helps innovative companies protect and nurture their most valuable asset - their customers - with the power of our award-winning platform. With our Customer Success Solution, you can gain deeper insights into customer behavior, operationalize the customer lifecycle, and coordinate actions and results across teams.

This article supports Gainsight NXT, the next evolution of the Customer Success platform. New and upgraded customers are deployed on Gainsight NXT.

If you have not upgraded and are using Gainsight Salesforce Edition, you can find supporting documentation here.

Not sure what your team is using? Click here.

This article walks you through how to create Playbooks, along with some examples of when Playbooks could be used.

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**Playbook Overview**

Playbooks are a collection of pre-defined tasks with relative dates. Playbooks help level the playing field for your whole CSM team and get everyone on the same page. They help ensure best practices are followed across the board, and provide a system for reviewing and revising the practices based on lessons learned and evolving needs. Playbooks can be used to standardize the process a user follows when a call to action is fired, or when an event occurs. Playbooks can be used to effectively answer questions such as:

- How should I handle a poor NPS score from a customer?
- How do I address a decline in usage activity from a customer instance?
- What do I need to do to prepare for a Quarterly Business Review with a customer?

Download our Playbook Workbook to map out which Playbooks you would like to implement in Gainsight.

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**Playbook Levels**

The playbook page has three tabs, Global, Company, and Relationship. You can create a Playbook at Global, Company, or Relationship levels. When you create a Playbook at the Global level, the playbook is automatically created even on Company and Relationship level. However, when you create a Playbook on Company or Relationship, the playbook remains limited only to that entity and is not applicable to other entities.
Playbook Templates

Gainsight provides you few out of the box templates. You can use these as-is, or edit them as needed, and apply them to CTAs manually or via the rules engine.

Create a Playbook

To create a new playbook:

1. Navigate to Administration > Workflow > Playbook.

2. Click + PLAYBOOK, on the Global tab. The Create Playbook window is displayed. This playbook will be applicable to both the Company and Relationships.

3. Enter the following details in the Create Playbook window:
   a. Select a type of CTA for which this playbook will be applicable, in the CTA Type field.
   b. Enter a name in the Name field.
   c. (Optional) Enter description in the Comments field.

4. Click SAVE.

This Playbook is created on the Company and Relationship pages also as you have created from GLOBAL tab. If you create a Playbook from either Company or Relationship tab, you can see this only in the respective pages.
Once you create a playbook, you can add tasks to the playbook.

Add Task(s)

Before you start building out Playbook tasks, we recommend that you assess whether they're helpful or necessary to include for your CSMs. A few tips to consider:

- Tasks should either be helpful reminders for CSMs which they might otherwise forget to complete, or that the business wants to ensure compliance with for a particular process. If any task doesn't meet at least one of these criteria, do not add it to the Playbook.
- If two tasks are likely to be completed at the same time, add them as one task.

To add a task to a playbook:

1. Click + TASK for the required Playbook. The Create New Playbook Task window is displayed.
2. Enter the following details:
   - **Name**: Enter a name for the task.
   - **Owner**: Enter the name of the Task owner and select one from the available values.
   - **Type**: Select either Standard Task or Email Task. For more information, refer Email Tasks.
   - **Due Date**: The due date by which the task has to be completed. This field has a + [number] Days section attached. Select an appropriate option from the due date and add a numeric value in the [number] Days section. For more information on due dates, refer to Managing Due Dates. Due Date is calculated as follows:
     - If you select **Assign Date** value, the Due date is equal to the date on which the task was created plus number of days entered in [number] Days section.
     - If you select **CTA Due Date**, Due Date is calculated as number of days lesser then the CTA Due Date, mentioned in the [number] Days section.
   - **Weekends**: This field has the following three options. Select an appropriate option from:
     - **Skip all weekends**: If selected, this will skip all weekends, if any, while calculating the due date. For example, if a task’s assign date is 8th Nov, 2018 (Thu) and the due date is set as Assign Date + 10 Days, the task’s due date after skipping 2 weekends will be 22nd Nov, 2018 (Thu).
     - **Skip weekend if due on a weekend**: If selected, while calculating the due date, this will skip weekends if the due date falls on weekends. For example, if a task’s assign date is 8th Nov, 2018 and the due date is set as Assign Date + 10 Days, the task’s due date after skipping 18th (Sun) and 19th (Mon) will be 20th Nov, 2018 (Tue).
     - **Do not skip weekend**: If selected, while calculating the due date, this will not skip weekends even if the due date falls on weekends. For example, if a task’s assign date is 8th Nov, 2018 (Thu) and the due date is set as Assign Date + 10 Days, the task’s due date will be 18th Nov, 2018 (Sun).
   - **Status**: The status of the task created.
• **Priority**: The priority of the task created.
• **Description**: The description of the task being created.

4. Click **SAVE**.

5. Optionally, repeat Steps 1 to 4 to add multiple tasks to the playbook.

**See Also:**

- [Managing Task Dependencies](#)

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**Email Tasks**

In the **Type** field, when you select **Email**, you are prompted to select a Journey Orchestrator email template to associate with the Task, and to map any tokens in the template. From the **Cockpit > Task detail view**, end users (CSMs) can modify the template, select a recipient, and send the email. When you click the Reset icon, the latest content from Email Template will be imported here (Playbook task), and existing tokens will be reset. However, the latest content will not be reflected in the existing CTAs (where a Playbook containing this Email Template is used).

To configure Email Type Task:

1. Select **Email** in the **Type** field. The **Email Template** field is displayed.
2. Select an Email template from the **Email Template** field.
3. Click the Map Tokens icon. The **Map Email Tokens** window is displayed.
4. Click **MAP** to perform token mapping.

For more information on configuring Email Tasks, see [Configure Email Tasks to Send from Cockpit](#).
Playbook Task Order

In Playbooks, you can drag and drop the tasks to change their display order. Additionally, in Administration > Workflow > Tasks, Admins can decide whether tasks should display in Cockpit based on the Playbook order, or based on Due Date. This option applies to all Playbooks, and is not configurable per Playbook.

Sync Playbook Tasks to Salesforce

Gainsight NXT in Salesforce CRM

Content in this section supports Gainsight NXT customers logging in from the Salesforce CRM. To learn more about Gainsight NXT in Salesforce, click here.

Click here to expand for more information on how to Sync Playbook Tasks to Salesforce

If the Salesforce connection is established in your org using Salesforce Connector, you can see the sync icon that allows you to automatically sync the playbook tasks with Salesforce. You can click the Sync icon at Playbook level to enable sync to Salesforce to all of the associated tasks. Alternatively, you can switch OFF the Sync at the playbook level, and switch ON the Sync at the individual task level, based on your requirement.

Managing Task Dependencies

You can assign a task’s due date based on another task’s due date or close date. In the following image, a Renewal CTA is present. This CTA has two tasks. Renewal Reminder Call Task, which needs the CSM to call customer 15 days before renewal date. So its due date is 15 days prior to CTA due date. The second task Second Renewal Reminder Call asks CSM to call customer 7 days prior to renewal date. So this task’s due date is set as 7 days after Task 1 is completed. Due dates of the tasks are as follows in this example:

1. Renewal Reminder Call: Renewal CTA - 15 days
2. Second Renewal Reminder Call: Renewal Reminder Call + 7 days

In this example, the **Second Renewal Reminder Call** Task is dependent on the **Renewal Reminder Call** task. Second task cannot be performed unless the first task is completed. In the **Due date** field for **Second Renewal Reminder Call** task, you must select **Task Due Date + 7 days**. So, the next field **Task**, allows you to select the dependent task. Here you can select the **Renewal Reminder Call** task. This setting ensures that **Second Renewal Reminder Call** task's due date is set as 7 days after completion of **Renewal Reminder Call** Task.

**Note:** Gainsight recommends Playbook owners to test any new Playbooks, or changes to existing Playbooks, to ensure understanding of the impact of due date dependencies on the CSM's workflow. For example, create a test CTA and apply your Playbook to the CTA. Then communicate with your CSM team about how the new due date dependencies work for that Playbook.

### Managing Due Dates

You are provided with CTA due date, Task due date, and Task close date options that you can use in case of task dependencies.
Assign Date: Date of assignment of a task

CTA due date: The date when a CTA is due

Task due date: The date when a task is due

Task close date: The date when a task is closed

None: If there is no due date, or you want to allow the CSM to select it in Cockpit.

Report on Playbooks

It's not possible to export Playbooks from Gainsight, however, you can build a report on Playbooks. In the Report Builder, create a report on the "Playbook" object. After you build your report, you can export to Excel or display it on a dashboard.

You may want to include the following fields in your "Playbook" report: d name, description, CTA Type, Entity Type, Task count, and Used count.