



Quick Guide To Customer Success

Welcome to your MongoDB Quick Guide to Customer Success.

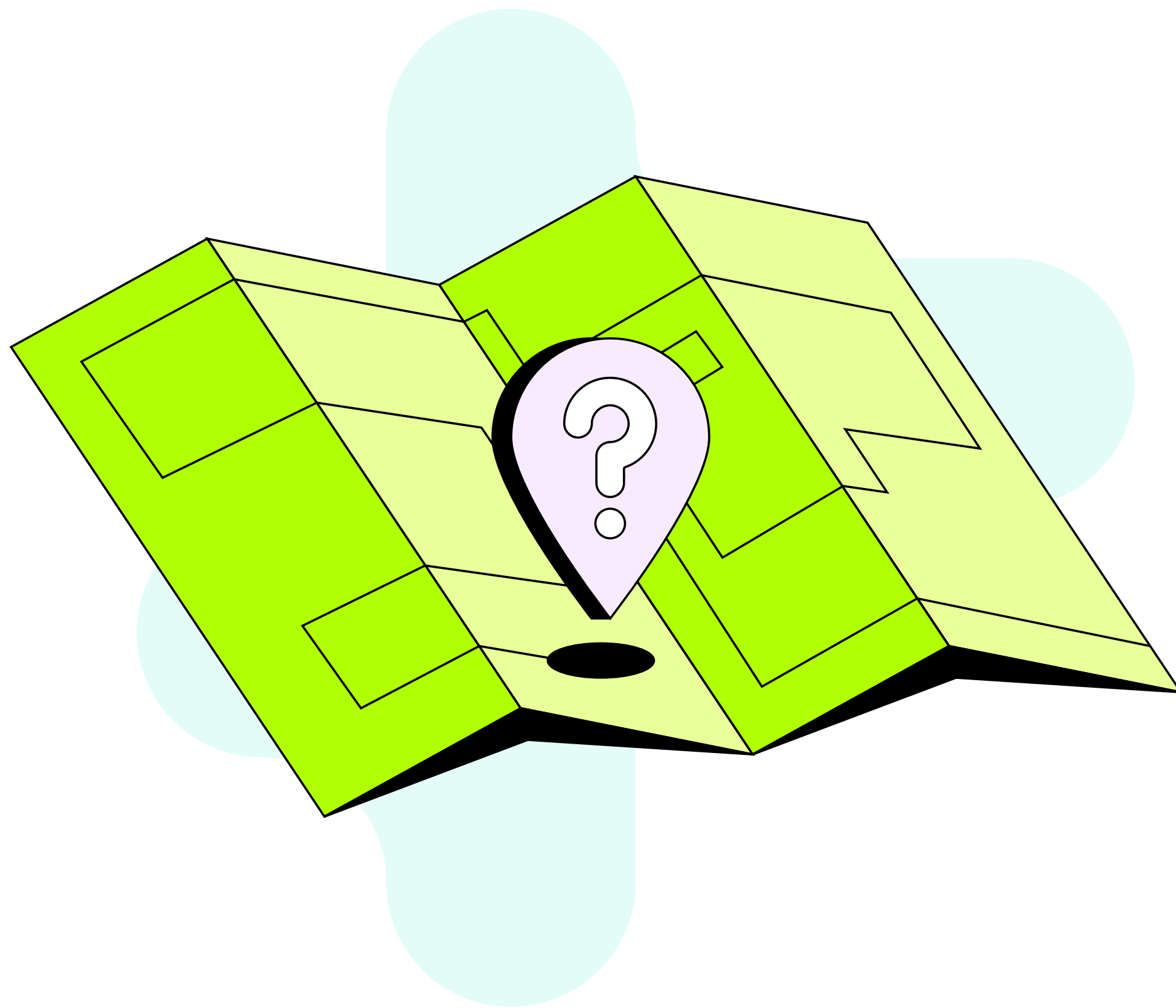


What this guide is (and what you'll get out of it)

Welcome! If you're reading this, you're likely about to get started with a new MongoDB workload – or you might have a project already underway – or maybe you're just curious about what CS at MongoDB is all about!



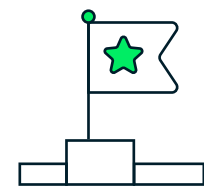
This guide is designed to help you take the **best possible path forward** with your project and make the most of your time with MongoDB's Customer Success team.



First, we'll quickly cover what Customer Success (CS) actually is, why it matters to you, and the kind of roles you'll be speaking to – along with how you can take full advantage of CS resources.

We'll then outline the 5-stage journey you can expect to take while using MongoDB for your project. We'll alert you to crucial best practices to keep in mind at each stage – as well as potential obstacles to stay ahead of.

Finally, we've got a *lot* of resources to help you fully harness the MongoDB platform and propel your project to greatness. We'll close off with a broad overview of the major resource hubs you can dig into next.



Business leader?

Here's what you'll get out of this guide:

- . A proven playbook to make sure your business goals are hit as swiftly and smoothly as possible.
- . An understanding of how your team will be set up for success.
- . A proactive look at high-level obstacles you'll want to prep your team to get ahead of.



On the technical side?

Here's what you'll get out of this guide:

- . A clear, practical guide to what you can expect as work kicks off or improvements are made.
- . Guidance on how Customer Success can support you along your MongoDB journey.
- . A vast array of resources that will help you excel with the MongoDB platform.

Customer Success in a nutshell

Customer Success is a complementary service that comes with being a MongoDB customer.

Our *only* job in Customer Success is to help you get the absolute most out of MongoDB – so you can build better, build faster, and smash your business goals.

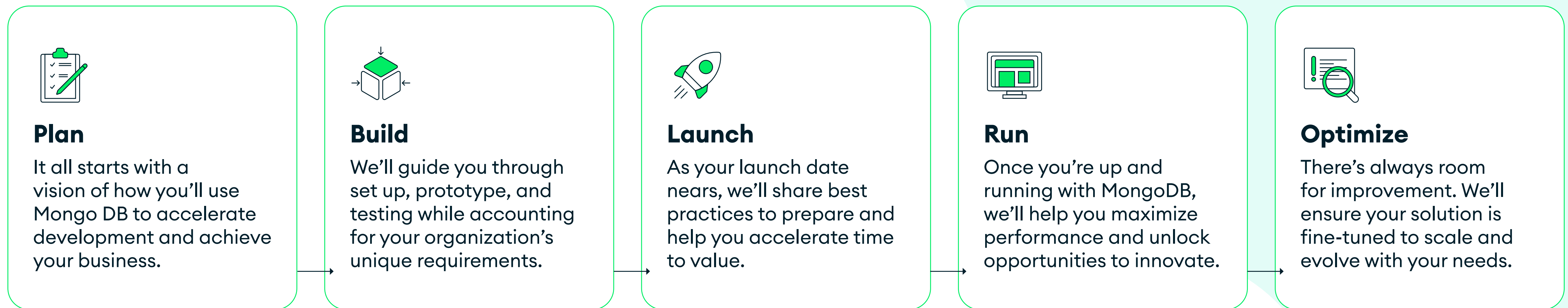
Soon, you'll be working alongside your **Customer Success Team**. They'll be there for you as your always-on partners and guides that'll help you plan, build, launch, maintain, and optimize your project as it takes shape.

Let's break down your forthcoming journey with MongoDB and how you can use Customer Success to make the most of every stage.



Your journey with Customer Success

Your journey at a glance



This is the shape of the *typical* journey you'll take – but your Customer Success team will work with you to make sure every stage is tailored to your exact needs.

Let's go over some things you'll want to keep in mind for each part of the journey ahead.



Stage 1: Plan

Defining your vision

The Plan stage is where you'll build a solid foundation for your project. You'll start by working with your Customer Success team to articulate desired outcomes, potential use cases, and application users. You'll align on mission-critical information like success metrics, milestones, blockers, and more. You'll also get guidance on creating the best possible schema design – a crucial pillar of your project's success.

We'll also help you with enablement planning based on your MongoDB experience level to get everyone up to speed.

The result of all of this is your **MongoDB Success Plan** – a foundational document that reflects your team's vision and keeps your project on track.

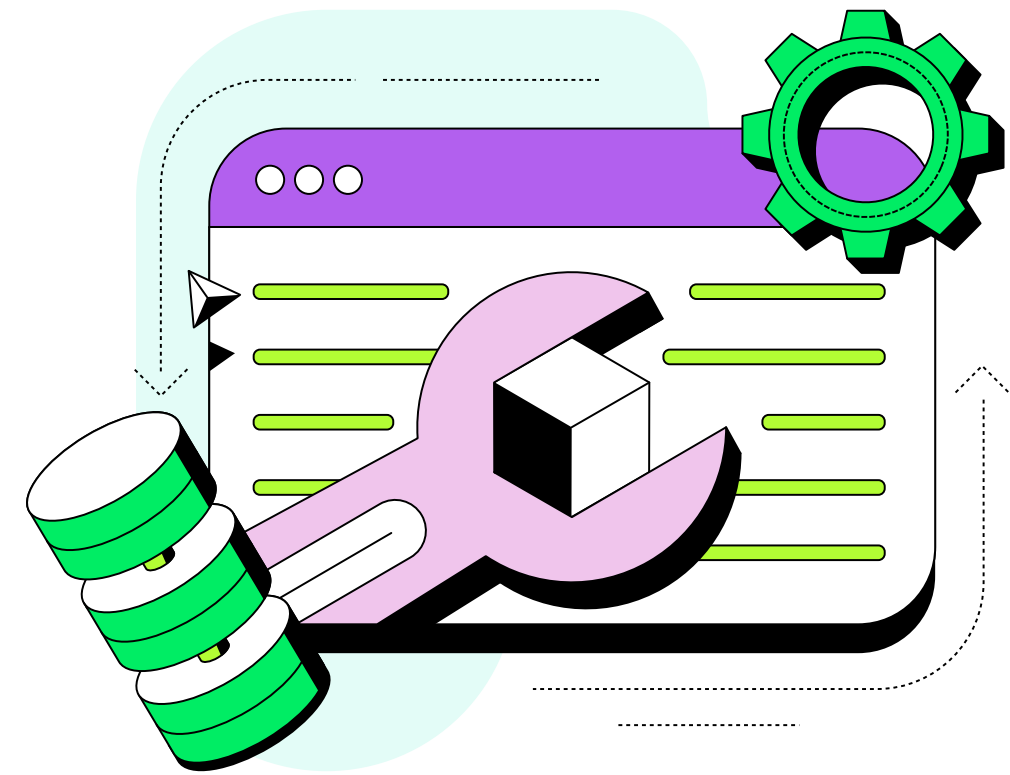


✓ Best practice tips

- Have your team brush up on [MongoDB basics](#) before planning begins.
- As you plan, think in terms of *outcomes*. Are there any desired metrics you can build around? Any upcoming events you'd like to prepare for?
- Schedule in sessions with your Customer Success team to get laser-focused on planning, schema design, and scope.
- With your project in mind, look at the [MongoDB Solutions Library](#) to see how other companies accomplished similar things.

✗ Try to avoid

- Undervaluing the planning and schema design phase. This stage is absolutely *crucial* (trust us, we have the stats).
- Overly complex architecture – this tends to slow down development and add unnecessary costs. Keep it simple!
- Setting ambiguous goals. Your CS team will work with you to identify those key success metrics that lead to concrete results.
- Unsupported integrations, drivers, and components. These often add operational overhead and risk.



Stage 2: Build

Laying the groundwork

The Build phase is all about setup, prototyping, and testing. This is when you'll ensure your use cases are supported according to your requirements for performance, scalability, and security.

You won't have to go it alone – your Customer Success team will be there to point you to documentation and best practices for configuring, testing, setting up alerts, and more.

They'll ensure you can get ahead of any challenges, loop in any relevant resources, and ultimately get *maximum* value from MongoDB. When help is needed beyond basic best practices documentation, they'll know which SMEs to engage and how to bring them in for hands-on support.

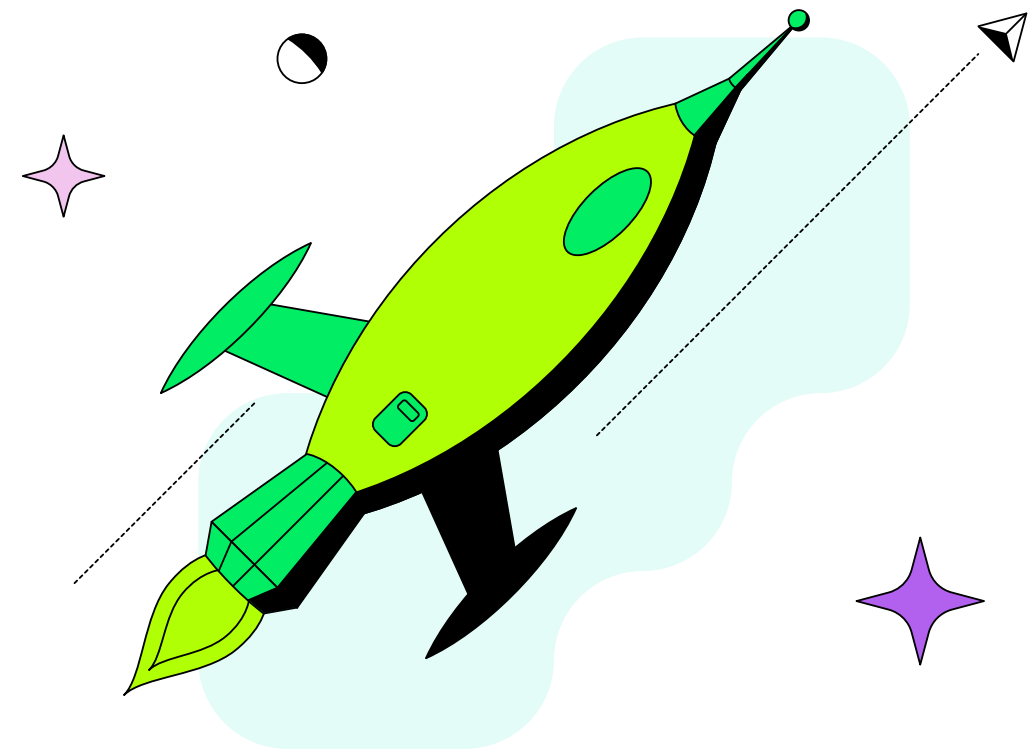


✓ Best practice tips

- Carve out the time to really focus on those best practices and testing. This kind of preparation before go-live often leads to *significant* downstream benefits.
- Check out our [Comprehensive Guide to Data Modeling](#).
- Take a look at this [Intro to Data Modeling webinar](#).
- Work with your CS team to schedule a schema design review.

✗ Try to avoid

- These common schema design pitfalls.
- Rushing through data modeling and testing – that's where scalability and performance issues take root.
- Ignoring query execution stats. Bad indexing might not cause much trouble initially, but as workloads hit production, it can cause some serious performance issues.



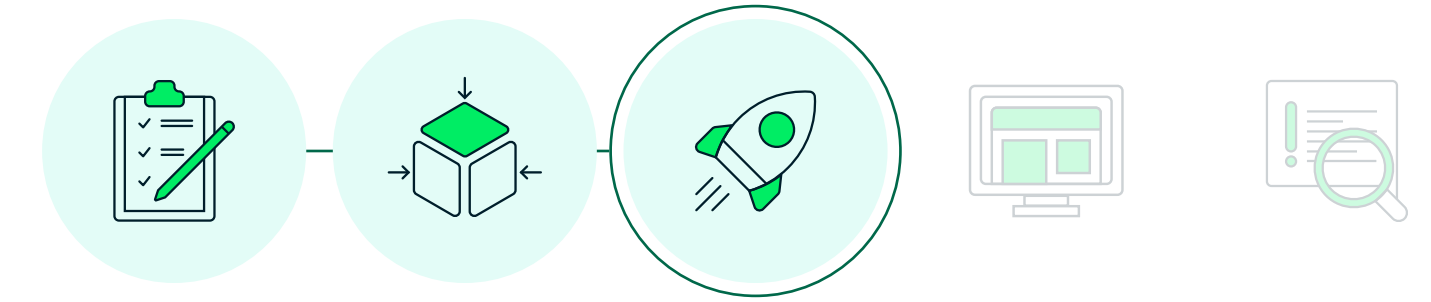
Stage 3: Launch

Getting up and running

Launch approaches! As we get closer to the big day, your Customer Success team will help provide guidance, resources, and examples to make sure that your staging and production environments are deployed to perfection.

We'll make sure that you're equipped with best practices for security, scalability, monitoring, backup, and rollbacks – so your project thrives without a hitch.

This is also where your team begins exploring intuitive new ways to work with data, bringing those ambitious project goals closer to realization.

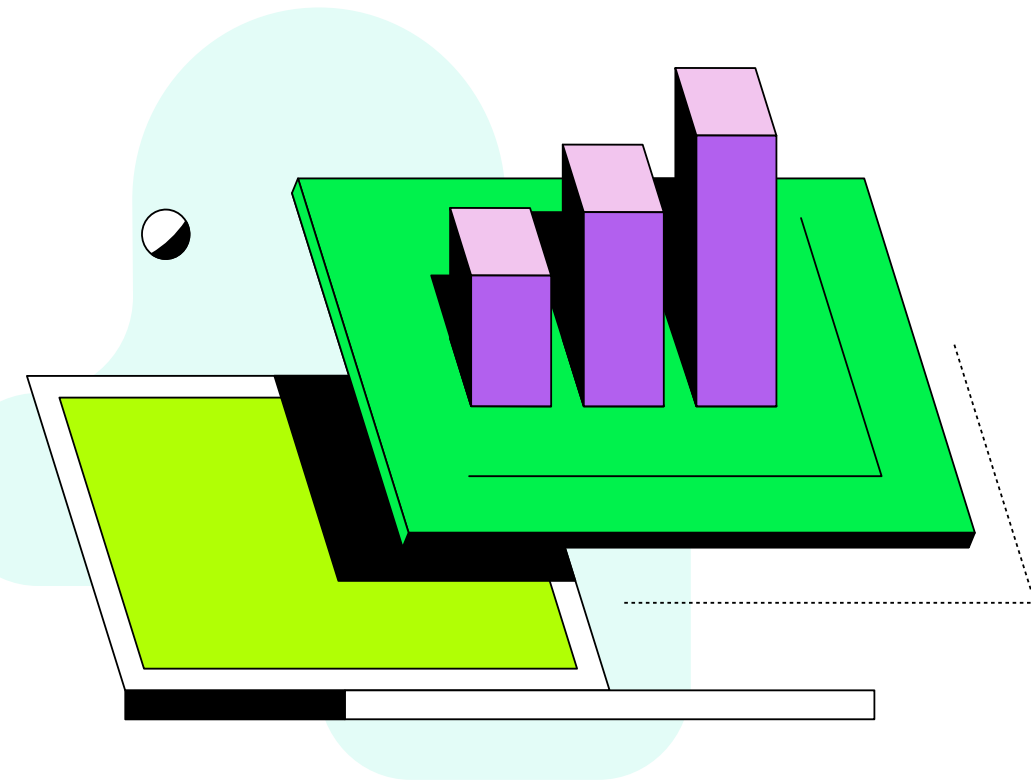
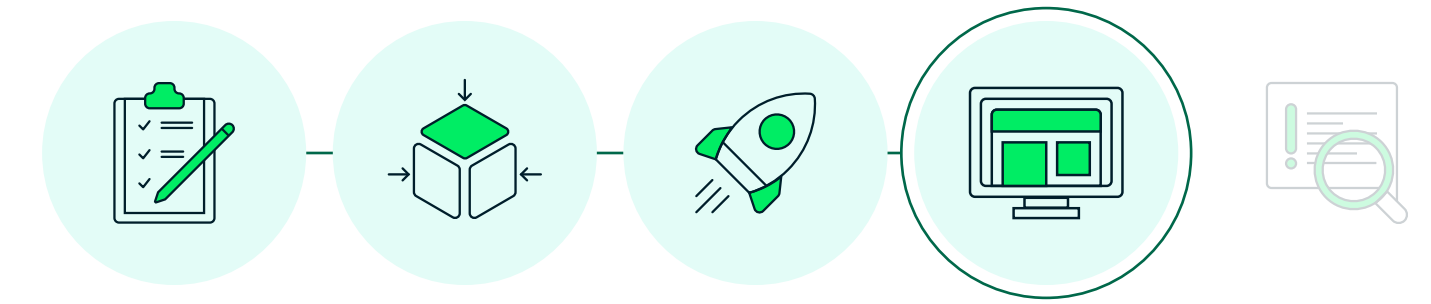


✓ Best practice tips

- Consult our dedicated [Launch Readiness Checklist](#) to make sure you're in the best possible position to launch.
- Work with CS in the pre-launch phase to ensure everything goes smoothly and you're set up for success.
- If your application is mission-critical, consider a proactive pre-launch support case for your go-live cutover.

✗ Try to avoid

- Approaching launch as a one-and-done. Make sure you set up a post-launch lookback with your CSM to ensure everything looks good!
- Under-communicating with your MongoDB team. We're here to help!
- Undervaluing the best practices that your CS team equips you with at this stage. Done right, they'll allow you to get ahead of unexpected hiccups.



Stage 4: Run

Setting a healthy baseline

A successful launch is just the beginning...

At this point, you're up and running. Now, your Customer Success Team will help you understand how to monitor internal performance and initial feedback from your own users, accelerating your time-to-value.

You'll analyze data access patterns and discover insights about the experience you're creating in a persistent feedback loop: analyze, tweak, repeat.

✓ Best practice tips

- Work with CS to relentlessly answer two crucial questions: Is your workload healthy? Are you on track to hit expected goals?
- Check out this guide to [Questions You Should Be Asking Your Data](#).
- Consider how your queries are performing against real-world load and leveraging the [MongoDB Performance Advisor](#) for potential improvements.

✗ Try to avoid

- Getting complacent with any issues that pop up in the first few months – they can hugely bog down your project's momentum down the line.
- Using hardware scale to compensate for performance challenges that a better indexing strategy could solve.
- Over-indexing on indexes. We have automated tools to help you identify *potential* indexes, but that doesn't mean you should implement them all.



Stage 5: Optimize

Seizing every opportunity

Because of the hard work we've done together in Stages 1-4, your team is in a prime position to scale with ease, iterate without headaches, and realize the maximum possible value from MongoDB.

From this point on, your CS team will help you seize opportunities for performance and/or cost optimization. That includes syncing up with your team to make sure MongoDB is accelerating your specific business needs, and that your users are getting better and better at squeezing max value out of their environment – as well as the new features that we're frequently rolling out.

We'll also collaborate with you on "health checks" and put you in touch with the right resources (like MongoDB Technical Support or Professional Services) to make sure your app is fully on track to excel.

✓ Best practice tips

- Read this [5 Best Practices For Performance Optimization Guide](#) as a start to normalize a healthy set of optimizing habits.
- Check out this [Performance Optimization Tutorial](#) for more practical info.
- Recognize that as your application iterates, some behaviors and access patterns may change. Maintaining workload health really is an ongoing effort.

✗ Try to avoid

- Missing checkpoints with your Customer Success Team! As new MongoDB features are rolled out, we'll help you understand how you can take full advantage of them.
- Optimizing in a vacuum. Reach out to us – we can (and will!) help you optimize effectively.
- *Only* optimizing in response to internal cost pressures. Crunch time optimizations often lead to mistakes.

A summary of how we help

Here's an at-a-glance recap of how your CS team helps you at crucial milestones, but remember you can also turn to them at *any* stage of your journey for whatever kind of help you need.



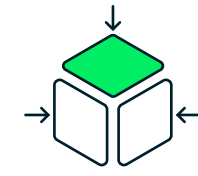
Plan

Product discovery

Services overview

Success planning

Project engagement



Build

Best practices

Design strategy

Architecture review

Testing guidance



Launch

Product readiness

Risk mitigation

Go-live lookback

Enablement workshops



Run

Solution monitoring

Health assessment

Product updates

Business reviews



Optimize

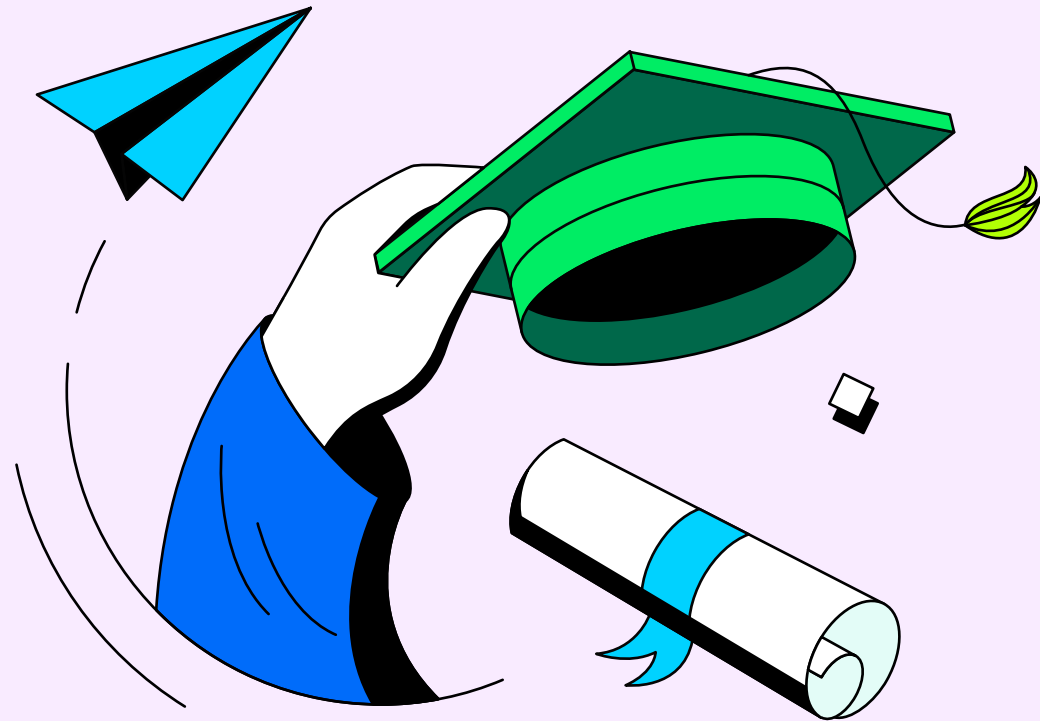
MongoDB advocacy

Feature evaluation

Value analysis

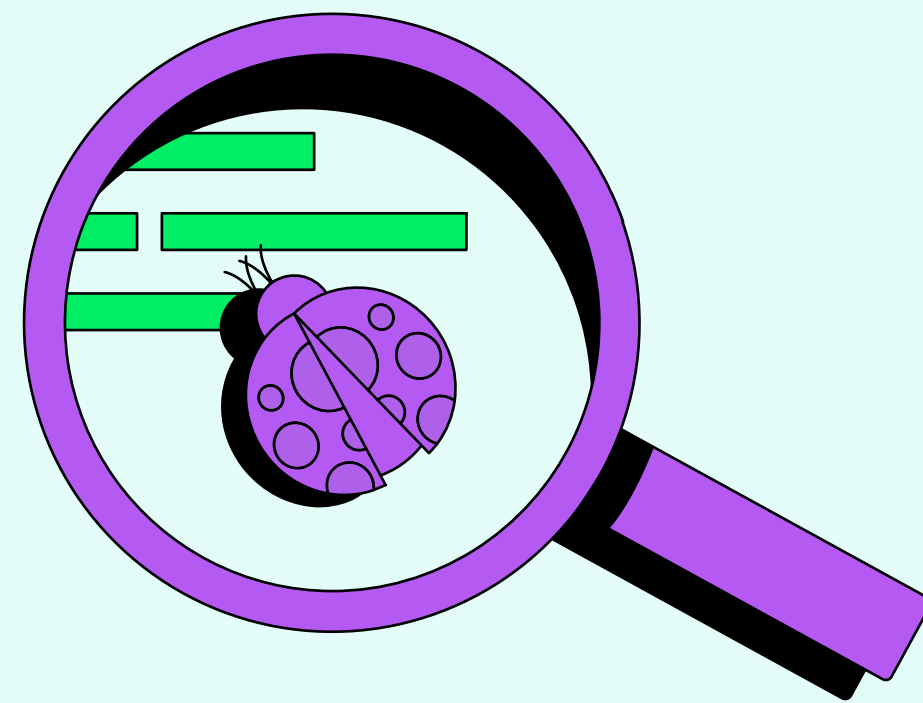
Roadmap planning

Quick resources to set you up for next steps



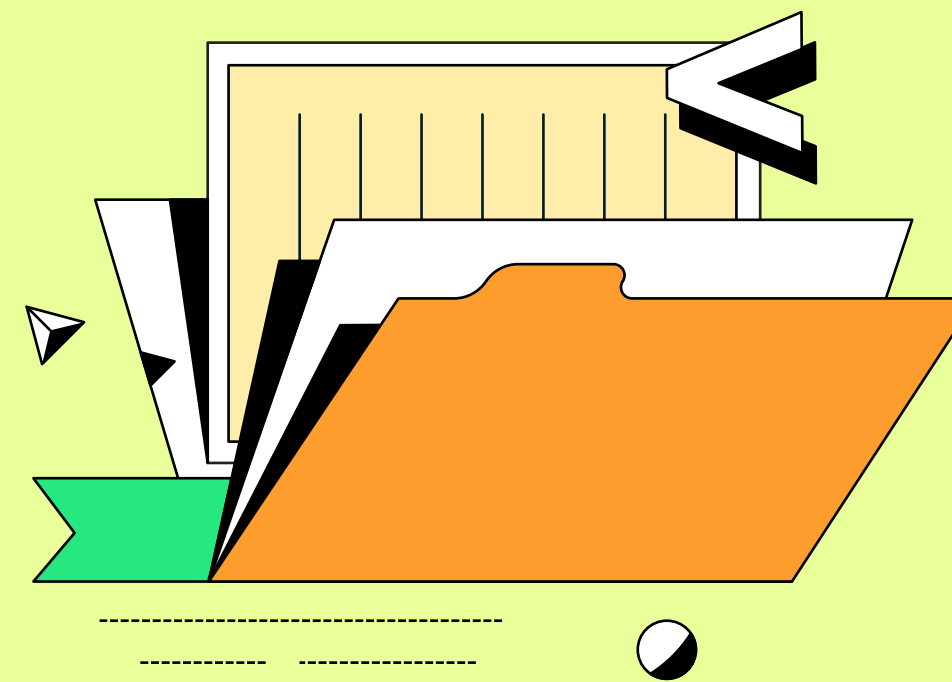
MongoDB University

[Check out our curated Onboarding Learning Path here.](#)



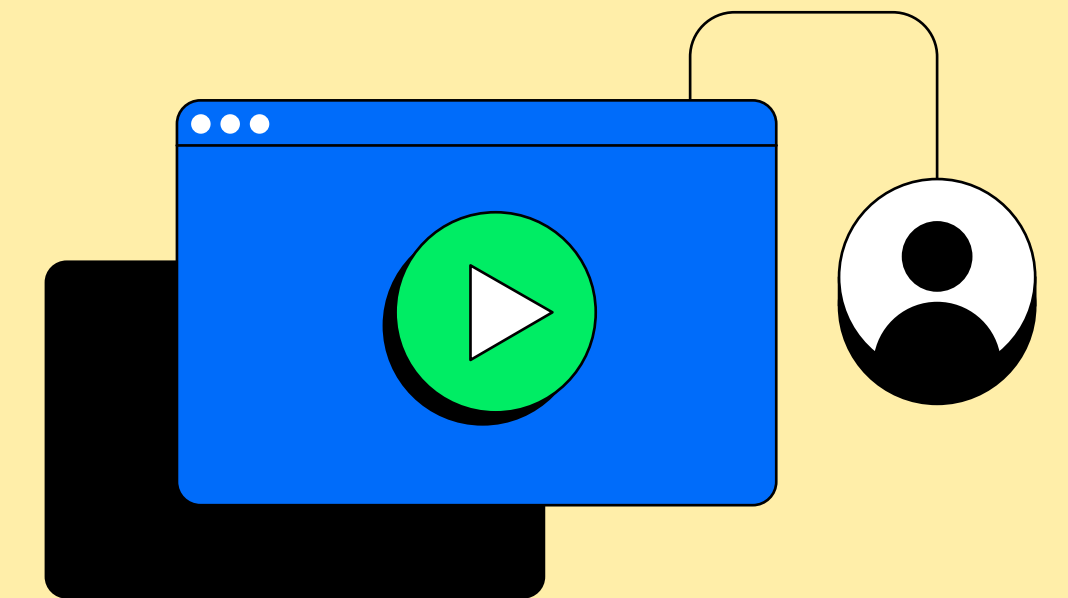
MongoDB Developer Center

[Browse all the MongoDB documentation you'll ever need here.](#)



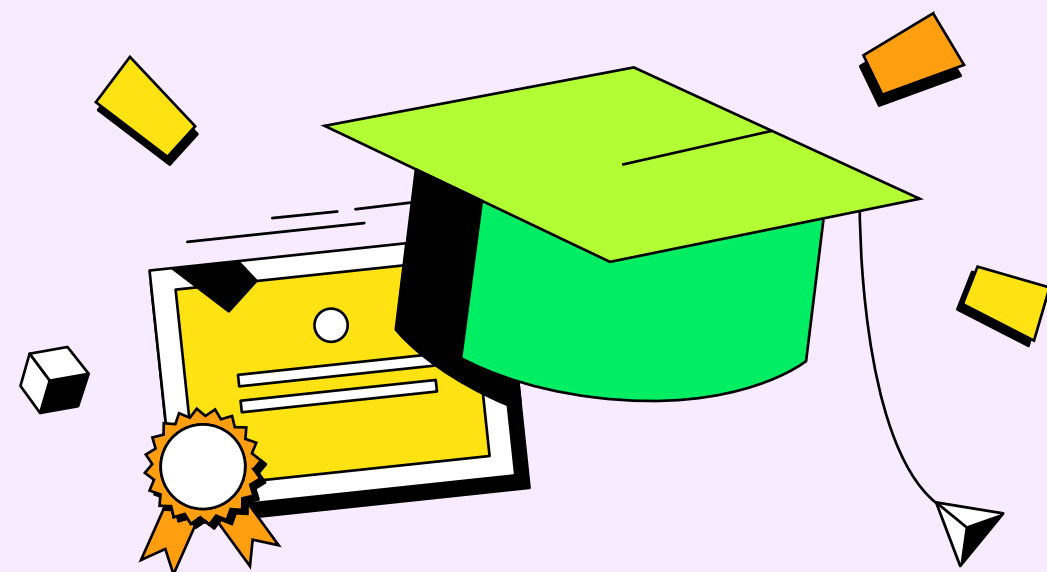
MongoDB Documentation

[Visit our MongoDB Developer Center for deeper technical resources.](#)



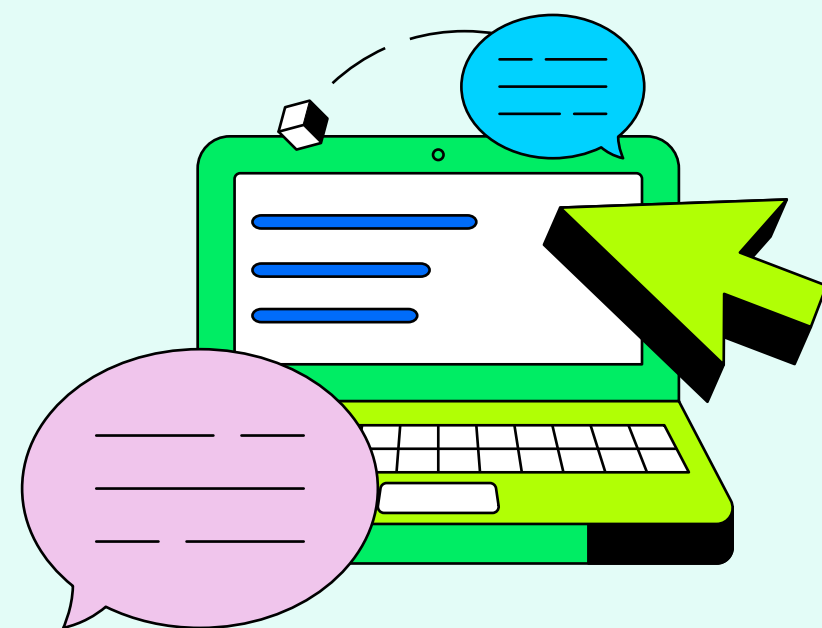
Webinars

[Browse our library of helpful webinars and videos here.](#)



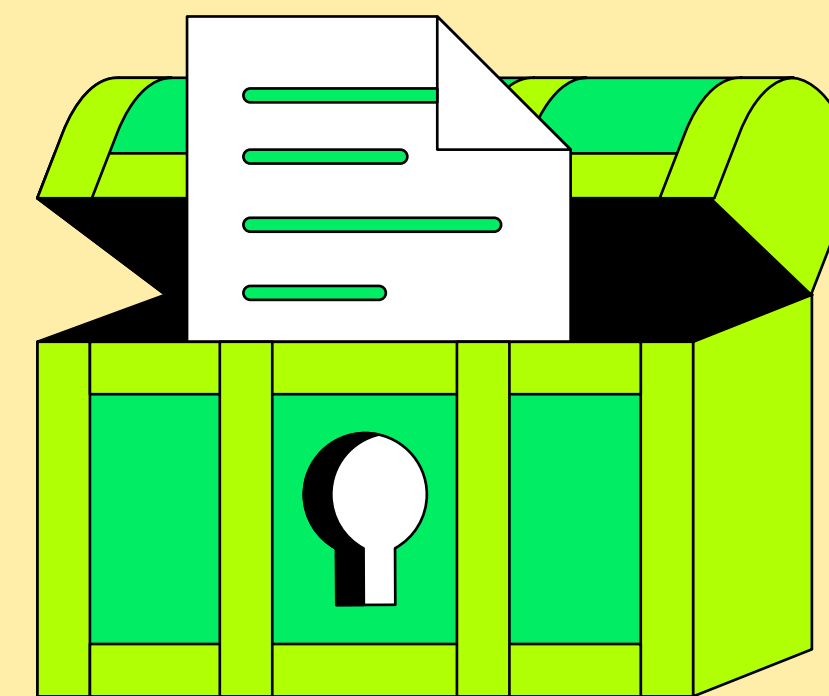
MongoDB Certifications

Get your team officially MongoDB certified here.



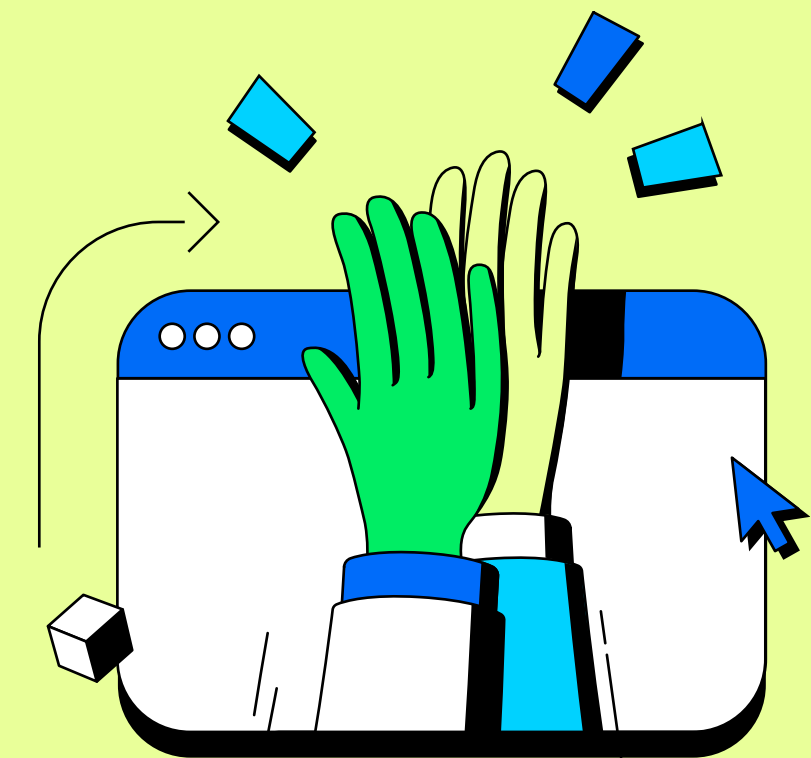
Community Forums

Join the conversation with other MongoDB users in our community forms.



AI App Resources

Learn about how we help you build AI-powered apps here.



Customer Success HQ

Want to learn more about Customer Success? Visit us here.

Meet your other supporting teams

Quick Guide to Technical Services



Learn about:

- ✔ How Technical Services helps keep your project running smoothly
- ✔ Best practices for opening and resolving cases
- ✔ A breakdown of different subscription types

Quick Guide to Professional Services



Learn about:

- ✔ How you can enlist MongoDB's expert teams through Professional Services
- ✔ The wide range of service options available to you
- ✔ Helpful resources



We're here to help!

Questions?

Reach out to us at Customer Success at contact-cs@mongodb.com