PRACTICAL CSM
MAKING CUSTOMER SUCCESS SIMPLE

Rick Adams | Peter Armaly | Scott Morgan

Customer Success
Attitudes to Training, Certification & CPD

2020/2021

Report

Contents

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Website: https://www.custify.com/

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Website: https://www.insided.com/

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Website: https://pie-recruitment.com/

Humans are emotional, messy, brilliant, irrational and constantly evolving. Their proprietary Customer Experience Investigation™ process serves mid-market and larger companies to bring back emotional feedback from customers and employees, evaluate the in and outs of the customer journey, and what your customers get ticked off about and expect from you.

Website: https://experienceinvestigators.com/

Dasteel Consulting exists to help companies to maximize the value of their most essential asset: their customers. To do this, Dasteel Consulting provides advisory services for new chief customer officers or those working to refresh their strategy, and offers customer performance assessments that evaluate current capabilities and create roadmaps for superior customers performance. Dasteel Consulting can also provide executive advisory services to help companies to engage their top customers in completely new ways.

Website: https://www.dasteelconsulting.com/

Introduction

"The size of your dreams must always exceed your capacity to achieve them. If your dreams do not scare you, they are not big enough."

Ellen Johnson Sirleaf, Politician, 1938 - Current

Key Elements

- Training, Certification and CPD are Non-Optional
- Developing and Implement a Well-designed Training Program is Essential
- External Providers Must Play Their Part

It Takes Dedication to Master Your Vocation

No matter what your vocation is, it takes a long time – perhaps a lifetime and sometimes not even then – before we can really say we have mastered our vocation. In the words of one musician (whose name is often contested) when asked how to get to Carnegie Hall his answer came… "Practice… practice… practice!! No matter what anyone might tell you about child prodigies, no-one starts off just "knowing" their stuff. One way or another that "stuff" has to be learned.

One secret of highly successful people is that they are prepared to delay their gratification and put the time and energy into training and practicing and working hard to get good. Whilst others slope off to get a beer, or arrive late after a heavy night out, it's the ones that are consistently in early and consistently staying back late that are almost always the ones that succeed.

Similarly then, if the Company wants to have a great Customer Success team that is consistently able to deliver high quality results that show a predictable and attractive ROI from CS activities, it must be prepared to make the right investments in people, in process, in tools and in training. Without well training people following the right processes and using the right tools, no busy CS department will be able to perform to anything like its optimum level.

This survey is all about learning what the current attitudes within the Customer Success profession are towards training, certification and continuing professional development (CPD). It surveys 219 Customer Success teams across all countries, and across all company types and sizes. Whilst it cannot be described as a scientifically representative sample of the overall cohort of Customer Success Teams, we believe that it is a large enough sample size to be statistically meaningful.

What that survey shows (we believe) is a significant lack in funding for training, certification and CPD activities within the profession, stemming (it appears) from the combination of a lack of available funding together with a misplaced belief that Customer Success Management is somehow special or different to any other profession, and cannot be or even should not be "taught" but instead needs somehow to be organically "grown".

The authors of this survey disagree profoundly with this sentiment and instead propose to CS Leaders that in order to maximize the efficiency, productivity and quality of their team, a carefully planned and orchestrated campaign of training, certification and CPD that is appropriate to the needs of that particular team must be implemented and carefully managed. We believe that doing so will yield significant results in improvements to team capabilities and outputs in both the short and long term.

Its Not Just a Case of ANY Training

Just as with anything else, a well thought plan based upon carefully considered outcome requirements is going to deliver a far better result than just throwing resources such as time or money at the challenge of delivering value from training and certification activities. In particular, CS Leaders need to take care to address the primary duties and expectations of the Customer Success team. Essentially it all goes back to the vision for Customer Success, which in turn should directly reflect and help to underpin the overall corporate vision, mission and core strategies.

Before doing anything else, we strongly recommend the CS Leader to develop their organization's vision, mission and core strategies and publish them within the CS team to ensure everyone understands both what it is you are trying to achieve and how you are intending to go about achieving those things.

Ready, Steady, Go!

Planning is great but only the implementation of that planning actually yields results. A good plan will reflect the immediate, short-to-medium *and* long term needs of the organization. For *immediate* deficiencies, a CS Team might decide to "plug the gaps" through bespoke training that is aimed at the particular weaknesses that the existing team have reveled to be present.

For *short to medium term value maximization* the team should then turn to a process of formal certification that is extended to all CS workers as a "right" and even a "responsibility" for them to carry out. By the end of this second program, the CS team can boast of a uniform, standardized and provable level of competence that pervades throughout the organization. The mechanism for onboarding and up skilling new team members should also be included within this area.

For long term growth and maturity, the CS Leader should give thought to a program of ongoing *Continuing Professional Development* or CPD that enables diversification of skill and knowledge gathering to suit specific needs and desires within the team and that supports the strategic needs and direction in growth of the overall business. This CPD program should be designed both to grow the team in the necessary direction to support growing sophistication in customers' demands from the CS team *and* to reward and incentivize retention, since any investment in training necessarily come sat the risk of losing your best trained workers if you do not give them reasons to stick around.

Fine, but What's on Offer?

Good question! Up until a couple of years ago there really was very little on the market in terms of external training and very little indeed in terms of actual certification. This is now changing, and multiple training companies

now offer professional level training and certification offerings for the Customer Success professional to choose from.

...But Don't Forget the Budget!

As time goes by, and as the Customer Success profession grows, the range and variety of choices for training options is likely to increase. But already there are options for both online self-study and teacher-led classroom-based learning that incorporates certification options as an end result.

The issue really comes down to the CS Team's (and perhaps the company's) appetite and willingness to invest in its Customer Success function. The lack of training budget allocation evidenced in our Customer Success 2020/21 survey shows very clearly that this apettite *must* grow, if Customer Success Management is going to succeed as a strong and credible business function within the business as a whole.

So there we have it. For CS to get where it ought to be will take dedication and willpower on the part of all of us. We *still* need to evangelize Customer Success Management to the outside world and to make (and win) the business case for investment. We must dream big and in doing so we must explain and evangelize those dreams to others, bring them on board with us and together fight tooth and nail to ensure that Customer Success itself succeeds as the strength behind not just SaaS or even Tech but *all* companies that sell B2B products and services with sufficient complexity and or scale to justify the immense benefits of Customer Success Management services to maximize and hasten the ROI from our customers' investments in our solutions.

June 6th 2021

Rick Adams

Peter Armaly

Scott Morgan

About the Authors

Rick Adams

Rick Adams is a business owner, author, trainer and consultant, specializing in helping technology companies deliver measurable business value to their customers. Adams has over 30 years' business experience including creating, managing and ultimately selling his own Software-as-a-Service (SaaS) business and more recently founding the Practical CSM Academy, a new business providing global customer success management consulting, training and certification services for everyone from aspiring CSM new starters through to seasoned senior CS leaders.

Adams' work includes the development and delivery of a global customer success management certification program for Cisco, and the creation of the world's only published framework for customer success management called the Practical CSM Framework. His book *Practical Customer Success Management: A best practice framework for rapid generation of customer success* was published in 2019 and attracts a five star rating from Amazon.

Adams' love for technological innovation, scientific principles, and creativity has established him as one of the most respected business outcomes and Customer Success experts globally, including being named as a Top 100 Customer Success Strategist in 2020, and a Top 50 Customer Success Influencer in 2021. Having delivered training and consultancy to many hundreds of businesses and thousands of technology professionals in over 30 countries across four continents, Adams is now based in the rural west coast of Ireland where he lives with his two dogs Zeus and Teri. His current interests include helping individuals and companies develop strategic best practices in customer success management and in business outcomes focused selling.

Peter Armaly

Peter is a senior-level Marketing and Customer Success professional with extensive experience working with wide-ranging enterprise clients of both SaaS and On-Premise customer engagement models. He is the current Head of Enablement and is a strategic advisor for Oracle North America Customer Success. Peter possesses an impressive background in building Customer Success strategies and teams for a number of companies and is a recognized industry thought leader and researcher for client engagement best practices.

Peter has a passion for thinking about the future of business and how people and technology can combine in more productive ways to produce better outcomes for all stakeholders.His work as a Customer Success advisor to a number of companies, including Practical CSM, CSM Practice, and Proof Analytics, underpins his ability to stay on the edge of the discussion about the present and the future of the practice.

Peter is also a monthly contributor to the popular Oracle Marketing Cloud and the Oracle Customer Success blogs,and has been recognized a number of times as being one of the Top 100 and Top 25 Customer Success Influencers globally.

Scott Morgan

Scott is a senior-level Customer Success and Cybersecurity professional. He is experienced in working with SaaS and on-prem service models in SMB and Enterprise businesses. He currently is the Head of Customer Success Strategy at Practical CSM.

Scott is active in the customer success field, contributing to the advancement of outcome-based business and customer success. He is involved in the local business community and business incubators. Over the past 30 years, he has used the principle of outcome-based and customer success to improve sales, services, and performance for businesses nationwide.

Scott is passionate about learning and the future. He holds three graduate degrees and a myriad of certifications and an avid reader. The future of business, technology, and how we will create value for all stakeholders is a principal interest. He continues to learn and engage with thought leaders to evangelize for a better world.

About Practical CSM

Training, Certification, CPD, Consultancy in Customer Success

Practical CSM is a training and consulting company that is dedicated specifically to the world and the needs of the Customer Success profession. Founded in 2019 by CEO Rick Adams, it is co-owned by Adams and by Marek Malinowski who perform the role of Chief Operating Officer.

Practical CSM views itself as a small business with "big business" values and capabilities but yet retaining small business flexibility and agility. After many years of working in startups (including his own SaaS startup that Adams initiated and ran for 6 years before selling in 2012) and small businesses, Adams has also served his time as a "Red Badge" freelancer with Cisco Systems, where he learned many powerful lessons about how to make the move from "good" to "great" and how to take others along with you.

Practical CSM focuses its products and services around its central philosophy for Customer Success.This philosophy is published in detail in Adams's book published in 2019 entitled *Practical Customer Success Management* but could be distilled down to the concept that taken at its simplest, *Customer Success* means customers attaining value from the ongoing adoption and utilization of the products and services they purchase from us the vendors, and that *Customer Success Management* is the best practice process of maximizing that value for customers.

This very simple "business outcomes focus" is built from the ground up into all that Practical CSM does, much of which comes from its iconic *Practical CSM Framework* which is both published in the aforementioned book and also available as a separate PDF, and which feature prominently in the vast majority of Practical CSM's consultancy, training and coaching services.

Practical CSM's flagship product is its *Certified CSM Professional* program which currently extends up to Level 4 (perhaps likable to a batchelor's degree in CS) and is right now being developed up to Levels 5 and 6 (akin to Masters and Doctorates).and which can be purchased both in online self-study and in instructor-led workshop formats.

Practical CSM is keen to put its own money where its mouth is, and business customers of Practical CSM are allocated their own Customer Success Manager who is responsible for helping the customer attain maximum value from their investment in training and certification.

In June 2021, Practical CSM also announced the launch of the *Success Hub* – a vibrant and entirely free community for CS professionals of all types and levels.

PRACTICAL CSM

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For more information please visit www.practicalcsm.com.

Foreword by Jeb Dasteel

August 2021

Customer Success is about three things: people, leadership, and change. In that order. There is a lot of writing available on the principles and mechanics of Customer Success. There is also quite an inventory at a conceptional level on customer-centered businesses and customer focus. This is great, but what's often missing is how to develop our people, how to reframe leadership, and how to systematically apply change management strategies, all in the service of Customer Success.

What's so compelling about this report is its focus on people, people development, training, and certification. There is clear recognition here that you can't effectively develop Customer Success professionals by recruiting for a devotion to customers and on-the-job training.

It's all too easy to lose sight of what Customer Success really is: people helping people successfully deploy our products, helping them attain the business outcomes they seek, enabling them to quantify business value, and creating great brand advocates as a result. When done well, Customer Success can consistently exceed expectations, in large part by the power of the subscription business model and Customer Success. These two things are inexorably related. Even organizations that don't actually sell and distribute their products as-a-service are influenced by the subscription economy. There is a reason why Customer Success has blossomed at the same time as so many businesses are moving sales and distribution to the subscription model and delivering anything-as-a-service.

In 2011 Marc Andreessen famously said that "software is eating the world." There is no question that was true then—and still is. But it's not just software. It's AI, data science, the ever-increasing speed and affordability of processing, and network efficiencies. It's also the subscription model. By extension, Customer Success is eating the world. Nearly everything can be purchased and delivered by subscription in both B2C and B2B environments. These subscriptions afford the buyer the ability to tie their business objectives and value realized to exactly what they buy, the capabilities they use, and how those capabilities affect their business

operations. This applies just as readily to buying a subscription for brushing and flossing your teeth as it does for large organizations running their supply chains and financials.

When you line up your spending to a specific business outcome, you also compel the seller to constantly innovate ways to help you realize even more outcomes. This is the hallmark of Customer Success.

All of this is entirely about people. It's our people that we engage with our customers' people, so they can be successful in their jobs and in making their companies successful. People create the value that Customer Success is ultimately about. So, the emphasis in this report on professional development, training, and certification is spot-on. Our people need to be constantly exposed to new ideas, approaches, and new technologies. Our customers readily see the value in this every day that we engage with them to deploy, adopt, and realize value from their investments.

If ever there were a perfect moment for a call to action, it's now: Train your people. Create ongoing professional development for your people. Encourage and sponsor certification programs. There is no such thing as Customer Success without People Success.

About Jeb Dasteel

Jeb Dasteel is the Owner of Dasteel Consulting and Founder of the Customer Strategy Alliance.

For 21 years, Jeb worked for Oracle, ending his career there in the role of Senior Vice President and Chief Customer Officer in September 2019. Jeb now applies the same level of drive and passion he displayed at Oracle in his own consulting business which focuses on helping businesses maximize the value from their relationships with their customers.

In addition to his consultancy practice, Jeb is also a founder of and is instrumental in running the "Customer Strategy Alliance", an organization whose mission is to help Chief Customer Officers develop and execute and world-class customer strategy.

Foreword by Jeannie Walters
August 2021

Too often, Customer Success teams are simply told to "do their best to make the customer successful." The result is each CS representative is doing things on their own - guessing at what the customer needs. Customer Success is part of the greater customer journey. Leaders need to ensure everyone in the organization understands what the customer experience promise and mission is, and what's most important to deliver it. Having goals that are vague or can be interpreted differently leads to inconsistent, frustrating customer journeys. Customer Success leaders need to define goals in clear ways so that both employees and customers understand those expectations.

In addition, Customer Success is one of the few departments interacting with customers on a regular basis. They are essential to understand the customer. Plus, they are often the first place a customer shares feedback, expresses their desired next steps, and expresses their appreciation. That type of feedback is valuable for senior leaders to know. And by knowing what the overall organizational goals, challenges and aspirations are, CS leaders can provide the right strategy for their team and actions.

Like any other profession, Customer Success management requires best practices to be understood by everyone involved in a particular organization so they can be applied in a consistent and effective way. Doing so goes a long way to ensuring minimum standards of both quality for the customer and productivity for the CS team are reached and maintained on an ongoing basis.

Detailed surveys like this one that incorporate first-hand, real-world data can go a long way towards helping CS professionals better understand where training & certification patterns, attitudes and trends currently stand, as well as how to prepare for future needs.

About Jeannie Walters, CCXP

Jeannie Walters is an industry-recognized Customer Experience Speaker, Trainer, Podcast Host, and Consultant.

For the last 12 years, Jeannie has owned and run her highly successful CX consultancy practice called "Experience Investigators". Experience Investigators specializes in qualitative, human evaluations of the real customer experience through a process called Customer Experience Investigation. Their evaluations help drive real action to provide more meaningful experiences for customers and improved results for the companies who serve them.

In addition to her consultancy practice, Jeannie is also a well-known and respected Customer Experience key note speaker and trainer, whose specialty is connecting with audiences to help them emotionally connect with those they serve.

Survey Findings

SUMMARY
Overview of the major findings presented in more detail below

ONE
Current Workload and Change Levels are Unsustainable

TWO
Lack of Experience and/or Maturity Creates Service Delivery Problems

THREE
The CS Profession Lacks Clear Expectations and Goals

FOUR
Representation at Senior Level is Critical

FIVE
Standardization is an Enabler of Professionalism

SIX
Onboarding and Adoption are Handled Differently by Larger Players

CONCLUSION
Investment is Needed in Training, Certification and CPD

Summary
of the major findings

Finding	Summary
ONE	**Title: "Current Workload and Change Levels are Unsustainable"**
	Both the total workload and the amount of change undergone by CS teams was rated high by most teams leaders. This is at least partially due to increases in both due to the CV19 pandemic, and as such may possibly reduce over time, however this high workload appears not just to be caused by change but also by scope creep, and by insufficient training and/or resourcing. High workload can lead to stress and ultimately to illness. This is therefore an important issue for CS teams to resolve."
TWO	**Title: "Lack of Experience and/or Maturity Creates Service Delivery Problems"**
	Whilst many CS teams ""feel"" like thy are efficient, effective and resposive, in reality this may not be always be the case. This is due to the relatively immature level of experience both generally within Customer Success teams and in particular caused by team leaders who have not received formal team management and leadership training or had much experience of such a role. More clearly defined objectives and the growth of maturity over time will assist with resolving this issue."
THREE	**Title: "The CS Profession lacks Clear Expectations and Goals"**
	One of the prevailing issues faced by CS teams and their leaders is the lack of clear expectations placed upon them, leading oftemtimes to difficulties in describing back to the business what exactly the CS team is delivering in terms of value and/or ROI. This is frutsrating both to the CS team itself and to senior management. Clarity around scope of expectations, a proper CS framework and clear repoting KPIs, guidelines and templates are required to overcome this issue."

Finding	Summary
FOUR	**Title: "Representation at Senior Level is Critical"**
	Because the Customer Success function is departmentally speaking the ""new kid on the block"" and because very commonly CS leaders have been promoted upwards rather than moved sideways and therefore lack manaement and leadeship training and/or experience, CS teams often find themselves under-represented at the senior leadership level. This cna have knock on consequences in terms of power and authority, budget and sponsorship levels and recognition for the work that has been completed."
FIVE	**Title: "Standardization is an Enabler of Professionalism"**
	Due no doubt to the relative newness of Customer Success Management as a profession when compared with other similar professions such as Project Management or Service Management, fewer frameworks and standardized methodologies for the delivery of CS services using tried and tested bets practices have yet been developed. However this is now changing and the CS profession now needs to start to embrace and utilize these standards to help mature its capabilities.
SIX	**Title: "Onboarding & Adoption are Handled Differently by Larger Players"**
	Two of the key aspects of Customer Success Management are onboardingand adoption. For smaller comapbie s- particularly SaaS companies who just sell one software product and where thsat product is reltively straightforward to undersatnd and use, there may be considerably less work need to be done. Yet to deliver value in these areas, considerable expertize is called for, and needs to be present if Customer Success is to succeed."

1 Current Workload and Change Levels are Unsustainable
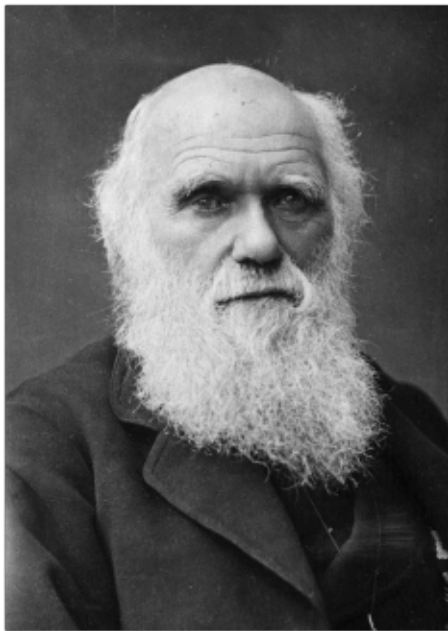
"It is not the strongest or the most intelligent who will survive but those who can best manage change."

Charles Darwin, Naturalist, 1809 - 1882

Key Elements:

- CSMs are overworked, and are required to deal with a lot of change
- A lack of industry-wide clarity over the duties of a CSM tends to exacerbate both of these issues
- To prevent burnout, CS Leaders must define the role of the CSM clearly

Workload
and Change are High for Most CSMs

What is immediately apparent from the survey results is that for the vast majority of Customer Success Teams, the overall workload they experience has become a serious problem. Workload appears to be an issue regardless of company location, company size, company ownership, or the size of the customer success team. In the survey, all of these different groupings returned an average of 9 out of 10 when responding to the question "How busy is your team?" This question, of course, attempts to address the current workload and how teams report how busy they are.

If we correlate the findings from the above question with another question in the survey, a broader trend around sustainability emerges. When all those groups returned a score of 7 or 8 out of 10 for the second question, "How rapidly is your team needing to adapt to meet changing needs?" we can safely read from the results that all or at least the vast majority of customer success teams are not just busy but also required to deal with change continually. Both workload and change are widely acknowledged as ongoing reasons for the perception that customer success teams' workloads are heavy.

When considered in combination, the exceptionally high current workload combined with the high rate of change would appear to indicate that most customer success teams will struggle to keep up if this pattern is continued onwards for any appreciable lenth of time. With new and increasing demands continually being placed upon CS teams,a "breaking point is likely to be reached in the not too distant future unless ways can be found to adapt to the increased workloads and increased change that survey respondents report that they expect to be experiencing in the future.

Impact of COVID-19 on Change and Workload

There has been a considerable amount of reporting on this topic of rapid an ongoing change. For example, McKinsey conducted a survey and research study on change in 2020 and released the findings in October of that year. In the paper called, *How COVID-19 has pushed companies over the technology tipping point—and transformed business forever*, they delved into the topic of change and how it accelerated significantly because of the pandemic. Below is a short extracted quote from the paper.

The results also indicate that along with the multi-year acceleration of digital, the crisis has brought about a sea change in executive mindsets on the role of technology in business. In our 2017 survey, nearly half of executives ranked cost savings as one of the most important priorities for their digital strategies. Now, only 10 percent view technology in the same way; in fact, more than half say they are investing in technology for competitive advantage or refocusing their entire business around digital technologies

If we take what the McKinsey authors are saying about how the executive respondents are collectively feeling about the pace of change, we can draw a couple of quick conclusions. 1) The pace of change will continue even when the pandemic is mercifully behind us as societies, and 2) the phraseology included in the quote is loaded with signals of an impending acceleration of change. Why? Because the changes that companies made in reaction to the extraordinary conditions triggered by the pandemic resulted in so much material improvement to productivity and efficiencies. Executives now view the benefits of moving more fully into the digital business world contains almost limitless opportunities for increasing their respective company's competitive advantage

Potential
Issues Arising from High Workload and Change

What effect does that have on individuals working within the CS profession and having to accommodate a fast pace of change into their workdays? How do the processes need to change? This is the other part of the subject of change that isn't explicitly called out in our survey study, but we can still apply some external research to offer some conclusions and advice.

[Workloads and lack of control of the workload is the leading cause of burnout](). Moreover, [burnout is contagious](). Whilst I have no figures for it, I have certainly anecdotally heard tales of "CSM Burnout" and stress caused by long hours and challenging workloads.

Workload
Increases Caused by Scope Creep

The accepted norm appears anecdotally and colloquially as "scope creep," which is how a project's scope seems to inadvertently, and almost unconsciously, grow the longer the project exists. To apply that in the world of Customer Success, think of the organization's mission as the project. Scope creep of the Customer Success mission is a widespread phenomenon and can be summed as the reality in which we see too many Customer Success organizations allowing more tasks to be continually added to the ever-growing "To Do" list for CSMs.

One of the more egregious and obvious examples of piling on an additional task is the expectation for CSMs to accept responsibility for chasing down NPS detractors while not building the internal cross-organizational processes to facilitate the smooth flow of information, or

ensuring accountability for creating the corrective measures that are required to address the issue correctly. While scope creep might work well for one-offs and work for a short period, it obviously increases workloads to the point of failure and beyond in the long term. Many stories abound anecdotally of individual "burnout" within Customer Success individuals and even complete teams getting more or less overstressed and burned out due to heavy workloads. These heavy workloads placed upon CSMs without the necessary planning for the successful management of them [may negatively affect the customer experience, which can in turn impact a company's revenue.](#)

A contributory factor to the above may be the relative newness of the Customer Success Manager role. This newness means that both the individuals in the CSM role and the organizational leaders face a relative dearth of knowledge about how much workload might be considered "the right amount" compared with other roles where such workload considerations have been thought about and dealt with for decades.

Another contributory factor might be the relative lack of power and authority in the senior decision making team that represents the interests of the Customer Success organization (which itself is a subject which we discuss in more detail elsewhere in this report). It becomes easier to throw additional tasks to the "newcomer" than it is to try to get a more politically astute or influential leader, or someone more seasoned as a business leader, to agree that their team should take on that additional task instead. So in this way, the most common scenario sees CSMs burdened with additional tasks to a greater degree than their counterparts in other functions such as Sales, Product, or Marketing.

Workload

Increases Caused by Lack of Training and/or Resources

What is particularly concerning is how this pattern of heavy workloads might feed into other practices, such as lack of training, lack of systems & processes, and lack of tools. Without these things, the CSM's job becomes substantially arduous and more complicated. It also takes a considerably longer time, impacting productivity which in turn increases workload levels and thus the cycle repeats.

High Workload and Stress

Stress is a particular issue in many 21st Century white collar roles. [Heavy workload is one of the most significant causes of work-related stress](). It is both a legal and (we believe) moral responsibility of all businesses to assess the risk of ill health arising from work-related stress and do all that can be done within reason to reduce or even eliminate that risk. Therefore, workload is an important (though by no means the only) aspect of Customer Success management that should be proactively monitored and controlled by senior decision makers. In conclusion, CS Teams must find ways to reduce existing workloads and deal with additional stress caused by excessive exposure to change.

2 Lack of Experience and/or Maturity Creates Service Delivery Problems

> "Quality in a service or product is not what you put into it. It's what the client gets out of it"
>
> Peter Drucker, Management Consultant, 1909 - 2005

Key Elements:

- CS teams feel they are efficient, effective, and responsive.
- CS teams in most SMBs are immature and lack experience
- CS teams are challenged to be in line with the business strategy.
- To improve CS teams:
  - Align with business strategy
  - Have a training budget of 4% of the CS teams wages
  - Proactive CSMs provide better results

Efficiency Appears High

Maturity Appears Low

Most Customer Success Teams reported reasonably high levels of efficiency, effectiveness, and responsiveness, with survey responses to relevant questions to this within the survey hovering around the 7 out of 10 mark. However, at the same time, except for the very largest, publicly quoted companies, CS Teams reported a lower than desirable score for team experience and team maturity, with each coming in at just 5 out of 10 on average, and this is coupled with only a similarly mediocre score for systems and processes – in this case even from the very largest of companies.

Interestingly, there is a correlation between efficiency, effectiveness, and responsiveness on the one hand and experience and maturity on the other hand. We would expect that a higher level of experience and maturity within the team would tend to show correspondingly higher levels for efficiency, effectiveness, and responsiveness. The pattern we see however is that efficiency, effectiveness, and responsiveness are scored around the "OK" mark whilst experience and maturity come in considerably lower.

High Reported Efficiency due to High Workload?

My assumption here is that because the workload is very high, teams are reporting higher than actual scores for efficiency, effectiveness, and responsiveness, not allowing for the fact that in reality, it is only by undergoing burdensome workloads that the CS Teams are able to cope. Or, to put it another way, instead of relying upon experience and maturity to deliver efficiency, effectiveness, and responsiveness, CS Teams may be relying on increased workload to deliver the same level of result. Related to that, a [Harvard Business Review article](#) by Michael Mankins in 2017 touched on the differences between efficiency and productivity, and it's succinctly laid out below.

Efficiency is about doing the same with less

Productivity is about doing more with the same

Which type of measurable activity would you rather see your team involved in?

What are we Being Efficient or Productive At?

Another possibility is that the CS Teams are confusing efficiency, effectiveness, and responsiveness with the ability to execute against the terms of the organizational mission. Meaning, they might be busy but it's possible they are busy with the wrong things. Spending time on reactive situations might offer reasons for thinking that good work is being accomplished. Just consider why the term "rockstar" is so prevalent in Customer Success – it may be because a CSM is good at "saving" a customer, usually by coordinating the resolution of a product problem. But it does not usually come near to addressing the expectations of what is articulated in a well thought out and comprehensive Customer Success mission statement.

The Importance of Clearly Defined Objectives

A best practice for Customer Success missions is to clarify for people how the organization intends to accomplish its goals within its span of control and align with the overall corporate objectives. Typically, companies like to help employees understand the large strategic plan by saying that they want to increase market share by w percent, grow revenue by x percent, retain y percent of existing customers, and increase the satisfaction of those customers by z percent, to name a few. Customer Success would construct its mission and models to address those goals through processes, people, and technology to align with those strategic goals. When individuals within Customer Success are unclear about the organization's mission, they perhaps equate escalation management or product configuration for customers as core capabilities and responsibilities of the organization (both reactive tasks). They may feel they are accomplishing these to a high degree of quality and importance, and hence they might report in this survey that they are efficient, effective, and responsive. Better ways to spend the precious time of CSMs would however be on proactive tasks including customer research, planning, providing content for customers that helps to move them forward in their success plan, etc. Those are the kinds of tasks that improve a Customer Success organization's overall efficiencies, effectiveness, and responsiveness.

Higher levels of efficiency, effectiveness, and responsiveness could therefore be viewed as the result or outcome of focusing efforts on making a proactive impact on the customer's business and improving the maturity and deepening the experience of the individuals within the CS team itself. This is the lower part of the metaphorical iceberg that CS leaders need to consider in a much more strategic way. Paying closer attention to how proactive work can improve the overall team's efficiencies, effectiveness, and responsiveness can result in the ability of the organization to make a more significant outsize impact on their own company's fortunes. But this sort of wisdom usually comes from experience and maturity.

How to Grow Maturity Levels?

Both experience and maturity take time, and we would naturally assume that greater maturity is organically developed as experience increases. However, there are a couple of other considerations that I believe need to be borne in mind. Firstly, in many roles and particularly in more junior ones, there is a fair amount of repetition of relatively straightforward tasks. Once a fairly straightforward task has been mastered, there may be little more maturity or wisdom to be gained from more exposure to this task. So it might be the case that for some CSMs who have a greater amount of more repetitive and less creative or less complex tasks to perform, growth in experience and maturity either flattens out or stops entirely after a relatively short period in the role. An example of this might be the "low touch" CSM who manages hundreds or even thousands of customers and who therefore has relatively little time to spend on any one customer. In these types of situations particularly (as indeed in all others as well), formal training and certification must be deployed to "plug the gaps" in direct on-the-job experiential learning.

Two further issues that might stand in the way of dealing with increasing experience and maturity effectively are small or non-existent budgets for proper formal training, and heavy workloads (see elsewhere in this report for more discussion on these points). Heavy workloads leave little or no time in which training activities can take place. Small budgets for training hinder education. With this as an existing pattern, mature and strong leadership must break out of any current unproductive groove and set things onto a new and better footing. Ideally, this leadership should come from the top and come with authority and budget to enable positive action to be taken.

3 The CS Profession Lacks Clear Expectations and Goals

"Begin with the end in mind."

Stephen R Covey, Author, 1932 - 2012

Key Elements:

- CS teams have a clear scope of work
- CS teams do not have clear expectations
- CS teams do not follow a framework
- CS leaders have a difficult time clearly describing the value of CSMs

What Should the Primary Responsibilities of Customer Success Be?

The survey revealed a wide variety of survey responses around each Customer Success Team's primary responsibilities. Some teams report very few primary responsibilities, and other teams report a much broader amount. Whilst this does correlate to some extent with the size of the CS Team (and by implication the size and age of the company as a whole) and larger and more mature organizations may have greater numbers of additional and more specialist teams to draw upon than one might typically find in smaller, newer companies, this does not, in my opinion, provide the entire answer.

Focus should be on Customer Business Outcomes

My own belief is that many companies have not fully adjusted to the "new world" where business relationships are outcomes-led rather than products-led and where Customer Success has become a "must have" element within the overall solution that is sold to the customer. Said a little differently, customers do not buy a product anymore and instead they "buy" an outcome. Expectations have changed considerably since the days when customers understood they would buy a product and still need to buy services (or do it themselves) to extract value from the product eventually. These days, customers expect the vendor to provide both the technology and the means for value realization. This ups the ante in the new digital business world, but this Customer-First philosophy or culture and the essential nature of Customer Success services as primary parts of the overall proposition to the customer, have not quite hit home yet. It's still not well-understood within the entirety of the vendor company. Many companies *will* learn this lesson, just as soon as their customers start voting with their feet and moving to competitors who already have such a philosophy and culture in place and are executing and producing measurable results that validate the story.

How Well do We Know Our Customers' Needs?

Before you walk away thinking that, well, that does not apply to my company, bear in mind that according to [research from Hubspot](#), an astonishingly high 42% of companies do not even survey their customers or collect feedback. That is a lot of companies that have no idea what their customers are thinking about the provider's products and services. That is a lot of self-inflicted silence. In today's digital business world, it exposes the short-sightedness of business leaders who fail to see that the old product-focused world of securing and growing market share is falling away. And, as stated above, this absence of a strategic sense of the customer's criticality to a company's prospects can become an existential crisis if competitors become more visibly able to deliver what those customers want. Customers respond to and will reward those companies that are aligned with their goals, and a customer's goals cannot be inferred simply because they purchase a subscription. How many times have you regretted subscribing to a product after you learned that the value wasn't what you had expected or it was too difficult to attain? Taken to the macro level of a B2B business, the consequences of inattention to customers can be catastrophic. Inattention slowly erodes the ability for a company to innovate in ways that can secure its future. By starving itself of customer insights, a company shuts off the most important data source and relies instead on the knowledge of its own people who are not users of the products and services in scenarios that the company envisions.

The Need for a Systematic or Framework Based Approach

But catastrophe can be averted through an intentional strategy that ties directly into the core value proposition of Customer Success. At its essence, Customer Success needs to be about the execution of a service to a wide array of customers and that focuses completely on helping those customers achieve their desired business outcomes. To do that requires a systematic approach, one that clearly describes the why, the what, and the how so that all participants, both internally and externally, understand the potential value of the model for both customers and providers. Only in this way can a high percentage of customers benefit from the service and for economies of scale to kick in.

Adopting a professional standard such as the Practical CSM [Framework greatly simplifies this process of building out such a systematic approach](). The framework sets out what tasks or activities the CSM is responsible for, and therefore it is relatively straightforward to determine from this what the primary responsibilities of the CS Team should be.

Every CSM Should be Able to Define Their Own Role

Whilst I do believe that I see a little less of it than I used to, I do still see conversations on social media platforms that ask the question "what is Customer Success?" or "what is Customer Success management?" and I still see answers that suggest all sorts of things, including that it is still too early to say what it is and it really hasn't been given sufficient time to mature into something that is readily definable as yet. This is most definitely and profoundly not the case and indeed never has been the case. Of course this is not to say that as a profession Customer Success management continues to grow, evolve, mature, and adapt to new and changing needs, as patently this absolutely does happen and will continue to happen. But that's the same for all professions!

Here is a simple test you can try out for yourself. Any CSM (and especially any CS leader) who cannot on demand and without hesitation tell you both "what" the terms Customer Success and Customer Success Management refer to, and what a CSM does and what value they add for both their own company and for customers, needs to attend a Customer Success Foundations training course ASAP. Expressions such as "it's too complicated to explain" or "I don't think it's possible to put it into words" are not allowed. It is not too complicated to explain, and it most definitely is possible to put into words that pretty much anyone at all (including those with no business background) should be able to grasp immediately. So go ahead and ask yourself these questions, and see what answers you can immediately come up with, and if you're feeling brave, maybe try these questions out on a few of your colleagues too!

4 Representation at Senior Level is Critical

"Leadership and learning are indispensable to each other."

John F Kennedy, Politician, 1917 - 1963

Key elements:

- CS leadership is new and lacks resources
- CS does not often have the attention of the whole organization
- CS leadership get to build the business and leadership skills

Customer

Success Has Unique Challenges

Customer Success is a challenging organization in which to be a leader. In fact, it's difficult to identify another leadership role that presents as many hurdles to success. It's true that sales leaders are responsible for hitting revenue targets and are often held accountable when their achievements fall short. The business world shrugs and says, that's the way it is. But at least leaders in sales organizations have standard processes that have been repeated and copied countless times and have proven to be successful the world over for many decades. Thousands of business books share best practices and advice for sales leaders, and more are published annually. An entire consulting industry was built and operates globally to address the thirst of sales professionals to learn how to improve the way they can lead people and teams to achieve against ever-greater revenue targets.

Let's do a little test: Type in "sales leadership books" in Google and see the number that is returned. We see 217,000,000. Now type in "customer success leadership books" and see what you get. If you're like us, you'll see a minute fraction of that sales number. There are many Customer Success books but precious few about being a leader in such an organization. Can Customer Success leaders just adopt and adapt lessons learned from other organizations, like Sales? Sure they can but not completely. Read on to learn more.

Why Customer Success Leaders Have it Hard

Primarily it's because of the relative newness of Customer Success as a functional area of business. Despite it being a formal functional area for over a decade in many companies, it's still viewed as nascent and immature with respect to its processes and the refinement of the roles that are included in its models, especially when compared to more tenured organizations elsewhere in the company. This is a valid point of view. All one needs to do is cast an eye over at Accounts Payable for a study in contrast. No one questions its purpose or whether it is structured to make the most sense relative to the community of customers. There is no ongoing and simmering – sometimes raging – debate about the very foundational principles and practices of accounting departments.

Anyone who has been even marginally involved in the Customer Success community over the last 10 years can attest to the evolving nature of the collective conversation about how organizations should be structured, the customer engagement models that should be developed and deployed and how those should be maintained and refined. All this is what we should expect when new business models come along and are seen by many as disruptions to the status quo. The very nature of Customer Success is to be the group held responsible for helping customers achieve their desired business objectives. To do that, they must turn around and confront and cajole their peer vendor organizations into pitching in and do their part. This often creates tension.

Tension rises to the top

By representing customers' business interests, Customer Success often inadvertently, unintentionally, and perhaps inelegantly bumps up against the mission and the priorities of the other organizations whose services they need not just to enlist but also to orchestrate. This is what happens when outside forces put pressure on companies. It causes stress and tension, and it doesn't take long before the senior leadership team gets involved, often reluctantly. No one likes outsiders coming in and telling you what you need to do, especially when it's not something that is overtly described in your own mission and strategy. But that's where many Customer Success organizations and leaders find themselves today. Customer Success leaders are thrust into situations where they are required to articulate why their teams' work is vital to the company and why their organizations need to be viewed in a far more strategic light than the current reality. This is a very steep hill to climb for individual Customer Success leaders some of whom may lack sufficient business leadership experience.

Ill-Prepared

Customer Success Leaders.

When you consider the environment we just outlined, which in the end is really a story about externally-forced (i.e. customer-driven) business transformation, Customer Success Leaders perform admirably in unique and less than optimum conditions. What hobbles them are a couple of things.

1. The need to build awareness and win allies to the notion of the criticality of Customer Success to the company's fortunes. The only role that can do this is the leader of Customer Success. This requires some advanced skills in corporate strategy, polished messaging, direct customer experience, diplomacy, and people leadership.

2. The need to close an identifiable and significant gap in the experience of the individual leaders. This gap should be thought of as a lack of "Tier One" management experience. Why Tier One? Tier one management experience is gained by being in positions where there is close exposure to being part of a company-wide effort to champion a new initiative and to be able to build effective business arguments, grounded in facts, for why the initiative should be invested in and funded, so it can be built and can effectively achieve the goals the executive team has prescribed.

This means that the ill-prepared Customer Success Leader is forced into a role of needing to represent, and indeed oftentimes fight for, not just their own needs and interests but those of the entire function or department they represent. This is unique to Customer Success leaders because, again, the relative newness of the organization compared to peer organizations means that senior executives do not know what they don't know.

For example, from the survey, the average spend per employee on team training is just $150 per year or less. That figure stands out and communicates loudly that Customer Success is being budgeted for only a very small amount of training. This would not make it past the financing team's initial draft of a budget in any other department. It's easy to fault the senior executive team for failing to fund Customer Success in the manner required to fulfill its mission. But the reality is this: If Customer Success leaders were more highly skilled in the language and strategies for building effective organizations, they would have a better chance of receiving their investment.

Sympathy for the Top

Life at the top is very different from even one rung down the ladder. At the top tier, the focus is not just on one department's responsibilities but also on the company's success as a whole. People who make it to this executive level tend to be strong-willed and highly motivated individuals who are heavily motivated by, and indeed strongly rewarded for, the business's overall success. They cannot, or at least should not, be seen as leaning too much towards investing in organizations that cannot articulate and prove how they will contribute to the key objectives of the entire company. Usually, this boils down to revenue. It would be advantageous if Customer Success leaders were to come sooner to realize that they need to become far more comfortable in speaking the language of revenue impact. Having that comfort will increase the odds of gaining an audience with executives who control the investment decisions.

Dealing with such strong willed senior leaders can be very difficult for those unfamiliar with them. It may require a different approach and a different set of skills than stakeholder management techniques that might work lower down within the organization. At this level, hearts and minds are won based upon business outcomes. Business vision/mission and business strategy combined with an understanding of the "art of the possible" in terms of investment in essential components such as process development, recruitment and training, software systems, playbooks and so on (i.e. the process, people and tools that combine to create capabilities).

Building the Outward-Facing Business Case for CS

An understanding of how to build, present and defend watertight business cases that utilize meaningful business and financial data to underline key points is essential. The "Customer Success Corner" needs to be fought for, both in robust arguments around the boardroom table and in provable and meaningful data in the reporting. Budgets, authority, control, responsibilities, and even collaborative access to data and other assets and resources must be argued for, and those arguments must be won if the Customer Success organization is going to succeed as well as it could, should and indeed must.

Currently the focus within Customer Success Management has been too "internal", rather than outward facing. More attention needs to be placed on how Customer Success Management as a function answers the challenges of the business as a whole and helps it to achieve its vision and business outcomes. Proper Customer Success strategizing and planning must take place at the most senior levels within the company, and with the sanction, participation and buy-in of the senior leadership team. For this to happen, Customer Success leaders need to be better-prepared in their leadership capacity.

5 Standardization is an Enabler of Professionalism
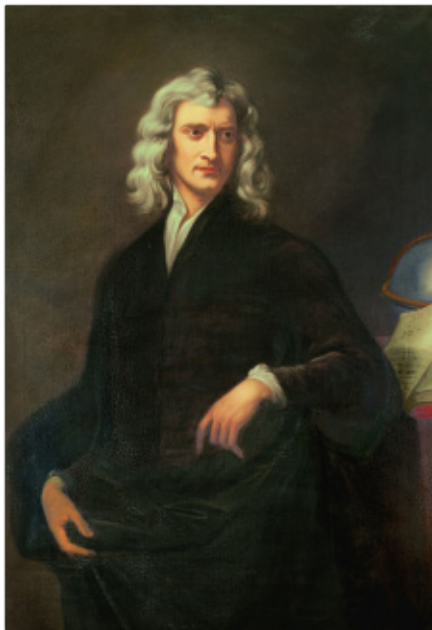
"If I have seen further than others, it is by standing upon the shoulders of giants."

Sir Isaac Newton, Scientist, 1642 - 1727

Key Elements:

- CS certification establishes a framework and improves performance
- Employer supported Professional Development improves employee retention
- Employers do not find it essential to provide professional development

Certification
and CPD Standards are Essential for CS Maturity

Why would business executives view Customer Success Management as a functional area in which it is perfectly reasonable for the employees to meet their role expectations without proper preparation? Does that sound like a preposterous question? Perhaps, but the data from our survey seems to show that to be the case.

When one considers all the other professional departments that are typical in today's businesses, whether it is accountancy, human resources, operations, software development, service management, product support, project management, sales, or anything else, there is a stark contrast in how the people in those organizations are set up for success versus how (it seems) most companies view the need for proper training of Customer Success Managers.

Most business leaders look at those other groups as being functional areas in which the employees should expect to spend a fair amount of their time undergoing intensive training, in the beginning, to get appropriately upskilled to perform to expectations in the role. Then to undergo periodic and ongoing continuous professional development to keep their knowledge and skills up to date and to improve upon them as they gravitate upwards in their career path. A 2020 LinkedIn research study of such leaders from 1500 companies showed that 33% of them anticipated an increase in spending for learning and development for their company's employees. Yet, the data from our survey does not reflect that optimism for CS.

Why should Customer Success Management be thought of any differently? The answer of course is that it should not. But the data from our survey on current spending on training indicates that currently companies are underinvesting in education and training for the vast majority of Customer Success organizations.

The Risk
to Business of an Undertrained Workforce

There is risk to business when customer-facing employees are not properly prepared and equipped to perform well in their positions. [The Wharton Business School concluded the following based on research they conducted in 2012.](#) "Customer service standouts tend to have extensive employee training and talent management programs." You might say, fine, but that's for customer service - what about customer success? There isn't much difference in how the standout firms invest in both functional areas and what difference tends to tilt away from Customer Success. Meaning, companies invest even less in customer success as a functional area, in particular, than they do in the broader category called customer service (which would include support, consulting services, and customer success). This problem will only exacerbate in the years ahead as revenue attribution measurement improves and Customer Success continues to rise in importance as a critical revenue impacting function on par with peer organizations like Sales and Marketing.

This is why the topic of training should be an issue of genuine concern for senior business executives. Suppose you want your company to have a reputation for service excellence. In that case, you need to invest in ensuring that your customers' experience is dependable, credible, professional, and meaningful (that it systematically and programmatically resolves business challenges). That might be achievable entirely through automation, entirely through people, or through a combination. Most companies today are operating with a combination of people and automation. So if people are a component of the service and the service needs to be excellent, a critical imperative exists for effective training. That ability to excel becomes a measurable impact on the health of a business when employees are well-trained.

Train Your CSMs... or Lose Your Good Ones!

Moreover and an additional layer of worry for executives is the following. There is a well-documented correlation between employee retention and the investment that companies make in their professional development. LinkedIn published a recent study called [Workplace Learning Report](#), and it reported that 94% of employees would stay longer in companies willing to invest in their professional development. That's a shockingly high number. Or is it? We need only think of our own needs within our role. Do we not seek to be the best? Do we not desire to be as well-prepared as we can be to achieve against the expectations for our role? Of course, we do.

Why is this Mismatch Occuring?

So why then the mismatch between how companies invest in training for their traditional business functional areas versus how they invest in it for Customer Success? The reason why, to date, this has not been the case could be due to the relative newness of the profession. It might seem like a long time, but Customer Success Management has only been a widely acknowledged and formal business function for just a little over a decade. Until now, best practices and professional standards have not been widely available or agreed upon. This is partly because they were still being developed, refined, and decided upon. Does that come as surprise? It should not if one considers that Customer Success was born from the evolution of the cloud-driven business models.

Because of the well-known paradigm shift of relationship control from supplier to customer, the imperative for vendors/suppliers to do more to retain customers became quickly apparent to business leaders. So they established a functional team to drive the customers towards realizing enough value that they would decide to renew their subscription. While

that made sense, up until the last few years, the very foundational principles of Customer Success were hotly debated.

It's hard to develop standards for operational best practices and measurements of success when it's still undetermined what the foundational goals need to be for a business function. Should Customer Success focus more on driving customer retention? Should it focus more on growing the investment of customers over time? Or, should it focus more on the basics of getting the customer successfully onboarded and established on the path towards a deepening of product adoption? From the ongoing debate, it appeared that executives wanted it all.

[The latest research from the Technology and Services Industry Association (TSIA) shows below,](#) it seems that the business world is finally aligning more around having its Customer Success organizations focus their missions around keeping customers on the platform/product (Retention) and helping them achieve their desired business outcomes (Adoption) and less on having them focus on growing the customer over time (Expansion).

The Truth is:

Customer Will Not Renew Unless They See Value

All focus areas are essential and depending on the company's specific needs well within the realm of control and influence of Customer Success – there is no disputing that – but much of the debate has subsided and come to agree on a single defining fact. Customers will not renew if they do not realize value from their investment.

As the debate has settled more and more, developing operating models that incorporate a foundation has become possible. There are best practices similar in principle to those seen in other long-established and standard business functional areas (like the organizations cited earlier). This has opened the door for the establishment of frameworks for how a Customer Success Management model should operate with customers (for example, in the form of the *Practical CSM Framework*) and for the consideration of professional standards (for example, in the form of *the Certified Customer Success Management Professional* - CCSMP). By deploying the former framework within the Customer Success organization and applying the latter through either self-study or instructor-led training and certification process, Customer Success organizations can realize considerable benefits in efficiency and effectiveness whilst simultaneously providing a mechanism for both internal measurement and external ratification or validation of the capability levels of both individual team members and of the teams as a whole.

External
Certification of Customer Success Capabilities

We are talking about infusing your Customer Success Management practice with more science through investment in training, developing an operating model framework, and establishing the ability to measure progress through benchmarking. But there is one more to factor in.

Third-party verification of knowledge and skills has been around for thousands of hundreds of years. It has been a method seen in apprentice programs, universities, and certification bodies worldwide to ensure and validate that those holding these credentials can do what they say. This system has worked well and continues to perform well in the modern world. Prometric, a test administration company, argues that "Clients, patients, and partners quickly assume confidence in the competency and proficiency of professionals who are both participants in their trade organization and recipients of industry certifications."
That's the foundational principle of education by certification, like Practical CSM or university. It shows several attributes the person holds and can demonstrate.

- Perseverance
- Dedication
- Commitment
- Time Management

These attributes are included in any business's ideal employee profile. They are included because it is essential to know employees are dedicated to their work and persevere to deliver the outcome. Also, when the training content is parallel and pertinent to their job description, you know they know something of value for the role objectives and are skilled concerning the job. Customer Success Management certifications communicate to the market that the employee is better well-prepared for their role in customer success.

Why are CS Certification Not Yet Commonly Employed?

Despite all this commentary about certifications, by analyzing the data in the survey we have found that businesses do not consider certifications a high priority. This may be because they are overburdened and do not have the extra time to certify their employees. Or it could be that they are unaware that certifications in Customer Success Management even exist.

We see in the data that education and knowledge of best practices are considered very important values to have in customer success. We also see that CSMs that are educated and possess the proper skill set usually tend to operate more proactively and are able to provide and drive better outcomes for customers (and, therefore, for the company providing the solution). We also see that without the support and encouragement of business leaders, it is difficult for CSMs to appreciate the importance of certification in ensuring that those values - education and knowledge of best practices - are culturally systemic in an organization and decide to pursue certification.

We anticipate that as Customer Success continues to spread in popularity – again, because of its inherent value for realizing value for customers in the cloud-based business world – executives' understanding and appreciation of its mission criticality for companies will grow in parallel. As a result, we believe that CSMs' desire for certification will become executives' desire too. Business leaders will want their people tested and validated. That is why we expect to see significant growth in the willingness of business leaders for external validation of the skills of Customer Success Managers. It will become an increasing concern of business leaders that by not supporting the certification for employees, it could lead to their decision to leave. Customer Success is a new industry and is proliferating. As it continues and as industries mature - especially around the cloud - certifications will become more important as a differentiator for companies to build confidence with customers and retain their best employees.

6 Onboarding and Adoption are Handled Differently by Larger Players

> "Live as if you were to die tomorrow. Learn as if you were to live forever."
>
> Mahatma Gandhi, Politician, 1869 - 1948

Key Elements:

- Post sales skills of onboarding and adoption are required
- CSMs require Sales skills to farm the account
- Overburdened onboarding teams do poorly
- Prioritization is an important skill to know
- Cross training improves flexibility and performance
- Large does not necessarily mean bureaucratic
- Expertise is important to deliver customer value

The Essential Importance of Customer Onboarding

Client/Customer onboarding is in some ways the most important phase during the lifetime of the vendor-client partnership because it is at the cusp of a weighty moment of juxtaposition. Let's discuss one side of that juxtaposition first.

During the sales phase - certainly on the vendor side and even sometimes on the customer side - different people lead and participate in the discussions and negotiations. This is a necessary fact of life due to the complexity still existent in the world of enterprise software sales. Check out this David Skok article in which he details that complexity and how it affects the calculation of customer acquisition cost (CAC). You can see below his high level depiction of how he sees the sales process for enterprise software sales.

Why is it so complex? Depending on the product's complexity itself, how potentially mission-critical it is meant to be for customers, and how sophisticated the vendor's sales process is, the roles and depth of knowledge of individuals can vary significantly. One thing is consistent from vendor to vendor though. That is, specific skills are required to effectively attract and secure potential buyers into engaging and learning more about products and solutions, and then eventually deciding to buy. Additionally, the process above does not factor in the marketing effort and the other roles involved in that part of the sales process. The specialized sales skills of marketing and sales differ from the ones that are later required to work with customers after they buy. Those skills and the people who need to demonstrate them are meant to focus on ensuring that customers can make effective use of what they purchased, enough so that they make a later decision to renew the financial arrangement.

The Importance of Post-Sales Skills and Roles

The other side of that juxtaposition presents different challenges, a different prism through which complexity needs to be observed and addressed, and a different set of skills and behaviors. The after sales skills take the stage once the deal is completed. New actors enter the scene with some foundational knowledge of the product (on the customer side) and some foundational knowledge of the customer's business objectives (on the vendor side).

For the new actors, it can be a challenging period of learning and a great deal of deciding whether they will be successful in positioning themselves as resources that the new client can trust. This depends on how well the customer intel was documented leading up to the close of the deal. It is up to these new actors to work together to ensure that the promises and dreams that led up to the signed deal can start the journey to fulfillment. It is a period of relative unknown and, if poorly handled, can set the wrong tone for what remains of the journey.

Onboarding is the first opportunity for both sides of the vendor-client partnership to establish a positive tone for the post-sales phases of the journey without money being seen as a critical factor or question mark. It is the phase when the product takes center stage. It is also when the vendor has their first concrete chance to demonstrate their product competence and credibility, when the customer should see the first example of value, and when they can be rewarded for their enthusiasm about the product and their purchase decision. [Getting onboarding right increases the likelihood that the calculation of a customer's lifetime value (LTV) will rise](), which is, as we know, a reliable indicator of mutual benefit.

Onboarding

may Suffer when Teams are Overburdened

When we consider all that information and the recap of the delicate period known as onboarding (again, it's delicate because of that weighty moment of juxtaposition described above), we believe that companies need to be much more careful with how they focus their attention on this phase. Let us consider first how smaller teams are typically deployed during onboarding. When we look at team size and responsibilities, we see smaller teams performing many different activities. This does make sense since members of smaller teams tend to need to wear more hats, where hat represents a set of tasks together with some degree of effort and resources for an objective to be accomplished. Often, though, the tasks compete for resources. The competition for resources can lead to constraints, which introduces a topic for another time (how to always be right-sizing your teams). When there are resource constraints, trade-offs are employed, leading to lesser outcomes in one for the sake of improved outcomes in another. This exercise of trading one outcome off against another can work in the short-term but never really works as a longer-term or even medium-term strategy. Too much stretching creates too many opportunities for work to go unfinished. Constraints can create scenarios in which onboarding, for example, is compromised and takes a back seat to a competing task that requires a focus on driving renewals or focusing on the latest critical issue that requires attention. Smaller teams feel this constant tug of war very acutely and often lack the ability to spread the work among the body (they look around and see no one can help) because all the members are experiencing similar constraints.

Prioritization
is a Critical Management Skill

Prioritization of resources is important. To do this properly, it is necessary to determine the relative importance of each activity. This requires a deep appreciation for the amount of effort required for each activity and the impact on customers. In other words, how would the customer perceive the successful achievement of the task and how would they perceive it being slowed down or postponed? It also needs to be asked during the customer journey, which activities provide long term value and short term value? What activities can be entrusted to others on the team, including the task of designing and implementing process automation or the development of a community? Assessment exercises like this help because they activate good leaders into making the decisions that enable the team to serve customers better.

Larger Teams and the Benefits of Cross-Training

Larger teams have a distinct advantage over smaller ones when it comes to onboarding, and we can see that from the survey results. While teams of all sizes reported the same level of busyness, smaller teams reported lower levels of experience and maturity. This makes sense because larger teams tend to have been around longer and have figured certain things out when it comes to process, technologies, and the development of requisite skills for their teams. For example, larger teams typically have their functions segmented. One function will be responsible for onboarding customers. Another will be responsible for driving product adoption with customers, and yet another will focus on working with customers to renew the commercial arrangement. With each role cross-trained in the skills of the other, it can make for an agile team that has the potential for doing even more. But only if leaders view their teams as a unit even though they have specialized talent and focus areas. This means they should always be working to develop the secondary skills of individuals and not just because it's a great way to demonstrate organizational agility.

It is also a smart way to elevate the overall customer engagement strategy in individuals' minds, which is a key factor in driving a broader corporate-wide strategy for continuous improvement and ongoing transformation. By the more easily tackled task of arranging cross-training, leaders can expose CSMs to other phases of the customer journey, building a stronger appreciation for the customer's experience. Seen in that way, cross-training is an easy way for leaders to facilitate the building of a customer-centric culture. And this is, as we all should know, what all companies should be striving to do. Probably the best guidance on that approach is contained in [this article from Bain & Co.](#) in which they share their extensive research on the topic of how functional and emotional elements combine to drive customer loyalty.

Larger

teams do not always equate to heavy and plodding bureaucracy

Outsiders often think of larger organizations as being too bureaucratic and slow. While that may once have been the case, the way modern businesses operate has improved in terms of efficiencies, and the way business leaders look at the size of teams within large organizations is no different. Shareholders and venture capitalists have little appetite today for slow growth. This is increasing pressure on business leaders to constantly look at operational efficiency as a key goal for their companies. Lean teams are the name of the game, whether it is in small, medium, or large companies, and McKinsey touched on this topic in this article. This equates to onboarding because, as we can see from the survey, larger teams (a reported variable that correlates to the larger companies to which they are attached) enjoy more mature processes and more mature efficiencies. This should challenge the still too prevalent opinion that size breeds slowness and an inability to be agile. It's not always the case.

The Need for Expertise

We hope so far that you've been able to see that onboarding is a critical phase – maybe the most vital – and that from what we can see from the survey, companies are too often giving it less of the attention and investment that it needs. One thing we haven't discussed though is how the notion of *customer experience* needs to be considered and the overweight we should assign to its improvement on the level of expertise that customers receive from vendors.

It may seem counter-intuitive, given the multiple actors involved in that onboarding-adoption-renewal journey depicted earlier, but the segmentation of duties actually allows for a superior customer experience. The reason is because of the more consistent application of expertise during each segment. Before you react and say that customers want "one throat to choke" – a detestable term - try to think about the time you needed to install, get fixed, or purchase something you knew very little about. If you are the average person, you likely hired someone. Just think about home repairs. According to [this article from MoneyCrashers](#) (with embedded links to solid research), between worrying about getting killed, destroying your house, or violating local bylaws, most people opt to hire experts to do the job.

Back in our world of high tech, the need for expertise should not be discounted. With customer experience coming increasingly to the forefront of how competition outcomes and how reputations are determined, it would be foolhardy to imagine getting away with looking at the onboarding phase as less than a critical period. Business executives and product managers might like to think of their products as intuitive, easy to install, and offer a rapid time to value, but the reality is almost always different. Customers, especially in the onboarding phase, are heavily reliant on the vendor to provide the expert guidance they need to succeed in some form of delivery. Whether it is a sophisticated and comprehensive self-serve process with rich content that is relevant and meaningful or whether it is a human CSM delivering the same but in a more personalized

manner. Customers need help because they are trying to navigate a critical period of basic learning during which the seeds of innovation can be planted.

It is important to prioritize the importance of each activity. Cross train so there is backup when needed. Have a team size sufficient to accomplish your goals and objectives. Small teams can make a significant impact when priorities are set and clear. Large teams can do the same, especially when specialized, which often results in better service and a more optimal customer experience. This picture we painted is customer success.

Conclusion
Investment is needed in Training, Certification and CPD
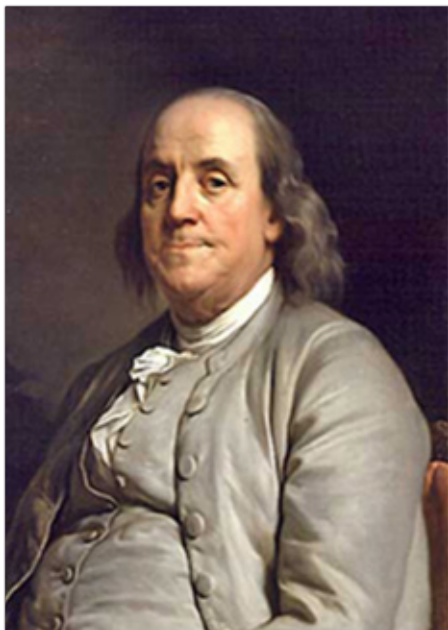
"An investment in knowledge always pays the best interest."

Benjamin Franklin, Politician, 1706 - 1790

Key Elements:

- Training spend is well below industry standards
- False beliefs and poor management leads to lower training investment
- Training spend of 4% salary increases corporate success

Current Spending on Training CSMs is Low

With certain notable exceptions, the overall average annual per team member spend on training was reported as just $0-150. Quite obviously, this amount is unjustifiably tiny compared with the spending on training for any other professional team. For example, PPS International's highly acclaimed annual leadership training survey for 2019 showed an average spend per head on leadership training of $986. It showed that this was not only an increase over previous years but that it also reflected an increase in the number of hours of training that each team member received. For another example, the Association for Talent Development state that the average organization spent $2,020 per salesperson on sales training in 2020.

Is there any logical and defendable reason why companies should be spending $1,000 to $2,000 per head on leadership training or sales training, but only $0 to $150 per head on Customer Success Management training? I would argue strongly that there is not. Customer Success Management is every bit as important to ongoing business success as Sales and Leadership. Every bit as complicated a subject to learn, and therefore should be considered directly comparable to these two other examples, especially within a SaaS company where there really is no excuse for not putting Customer Success first as a top priority for ongoing investment.

CS Training Budgets are Not Being Allocated

What I believe has happened is that early stage startups without the managerial and business leadership experience of more established companies have simply not budgeted for or recognized the need for training for their CS Teams. The arrival of COVID-19 in March 2020 exacerbated this situation, with many companies finding their budgets being squeezed to reduce "unnecessary expenditure," and often, one of the first things to go in this type of situation is the training budget. For other companies, COVID-19 has quite simply found them run ragged with excessive workload pressures as the CS Teams try to keep up with the demand from customers for personal interventions, re-organizations, and flexible arrangements due to their own shake-ups caused by the COVID-19 virus.

With the backdrop as it now is of heavy workloads combined with continuing pressure from increasing rates of change, treating training as an "unnecessary expenditure" is no longer sustainable for most companies. To maintain the CS Team's current levels of knowledge and experience, let alone grow them to meet the additional and ever-changing demands being placed upon them all the time, CS Teams will have to invest substantially in training and development.

Additionally, early stage startups without the managerial and business leadership experience of more established companies are not measuring KPIs related to training. They, therefore, have a more challenging time justifying expenditure on training where the ROI is unknown, compared with other expenditure that is being measured and where the ROI can be shown.

The notable exceptions to the meager budgets for training are the handful of big Public Limited Companies (PLC), or publicly traded as they are known as in North America, that responded to the survey. These larger organizations more readily understand the value of "doing it right" and no doubt go in with the expectation of having to provide a reasonable budget

for the training and ongoing development of their CS function. In addition, they understand better how to measure learning to appreciate its value to the business.

False Beliefs and Lack of Managerial Experience Lead to Low Investment in Training

One pattern that frankly surprised me when I first encountered it, is a pattern amongst many (though by no means all) CS leaders of belief that "Because Customer Success is done differently here, we have little or nothing to learn from generic training." This lack of understanding or wisdom in CS leaders astounds me to this day. Yet, the sentiment is still prevalent among many CS leaders, who appear to be of the opinion that Customer Success is "special" and "different" from any other profession or role in that it cannot be taught in a standard way. This attitude is patently ridiculous.

Yes, of course, every CS team is unique, and yes, of course, there are aspects of a specific CSM's role that need to be coached and mentored rather than taught. Still, the fact remains that just like every other job known to humankind, the vast majority of a CSM's role can be documented and taught in a typical classroom situation. There is nothing mystical or magical about Customer Success Management. The deployment of a high quality generic framework, such as the Practical CSM Framework, will provide a massive contribution in terms of both quality and productivity for most CS teams. The Pareto Principle (also known as "the 80/20 rule") can be followed to customize whatever aspects of the generic framework, systems, process, and training are required to meet the unique and specific needs of a particular CSM or CS team. I make no apologies for saying that dropping this immature belief amongst CSMs and (worse) CS leaders is an essential stepping stone to evolving higher quality CS Services. Where users are adequately trained, qualified and certified, and where customers can feel confident that the help and advice

they are receiving from their suppliers' CSMs is based upon acknowledged and published best practices.

In reality, attaining a certification has been proven to provide four benefits: Firstly, it enables greater internal peace of mind because certified professionals tend to adhere to professional standards. Secondly, it delivers confidence to customers that their help and assistance are of adequate quality and relevant to their needs. Thirdly, it increases productivity because certified team members tend to use their advanced knowledge and skills to perform their role to a higher standard. Finally, it leads to [more satisfied employees who are less likely to churn](#).

Increased Spending in
Training Leads to Increased Corporate Success

Is an increased spend per head of Customer Success management likely to yield a measurably positive result for the company, and if so, how much spending on training is "enough"? An in depth study undertaken in the 90s by [the American Society for Training and Development (ASTD)](#) proved a very real and direct correlation between spend per head on training and shareholder value, with companies with less than average spend per head on training reporting roughly only half as much value returned to shareholders as companies with more than the average spend.

With the backdrop as it now is of heavy workloads combined with continuing pressure from increasing rates of change, treating training as an "unnecessary expenditure" is no longer sustainable for most companies. To maintain the CS Team's current levels of knowledge and experience, let alone grow them to meet the additional and ever-changing demands being placed upon them all the time, CS Teams will have to invest substantially in training and development. Our suggestion for "how much" would be between 2% to 4% of salary. 2% of compensation is the average spend per head on training found by the [ATSD in its research](#) (see paragraph above). We would suggest 2% a bare minimum spend to enable teams to maintain an "average" capability. Even then, this assumes maintenance, not growth, which may not be achievable if the start point is not sufficiently high. 4% of salary would provide the ability for lagging teams to catch up to the mean.

According to IBM "Top performing companies recognize not only the importance of their people but also the need to provide the right skills to enable their people." In their recent research, IBM found that "71% of CEOs identified human capital as a key source of sustained economic value." Their research also clearly identified a strong and direct link between employees who receive the training they need to perform their job effectively and overall corporate performance, as shown in the table below:

Fig 1. Source: IBM Smarter Workforce 2013 Training and Tenure Report

Bigger Training Budgets = Higher Performing Companies

Companies that are committed to training and advancing the skills of employees are often better off in the long run. Forbes reports that CEOs committed to customer success grow 6 times more than companies with CEOs who are not committed to customer. Companies that adequately train their employees retain their employees 3 times longer than those with little to no training. Training and focus clearly show their advantages, yet employers often choose other priorities over training.

Our survey pointed to a similar result with respect to CSMs. CSMs often did not get much training in the field of Customer Success. That employers prioritized training in the lower quadrant. Not necessarily because they thought training was unnecessary. The survey numbers for a knowledgeable CSM were high. Training was a lower priority due to all the other activities a CSM had to accomplish in their day.

The concept that CSMs receive training (upskill and new learning) is very important to the business. Improving skills in the attributes that make an ideal customer success manager increases the customer's lifetime value by improving the relationships, driving outcomes, and delivering renewals and upsells, all of which are metrics that the CS profession is measured on. Taking care of clients and helping them to attain their outcomes are of the highest priority. How do we create the time for training to drive success with our clients? That is a good question. For the past 20 years, I have followed the 80/20 rule. This is how I spent my time and efforts and averaged over time. Not every day is so busy one cannot learn something. On the average year, 20% of my time is spent on learning. That is about 4 hrs per week. Suppose we use the figure of 4-6 hrs per week. It would take around 12 weeks to attain full Certified CSM Professional certification from PracticalCSM. Every team leader needs to find the right balance for their team and encourage and reward their team to drive the types of training engagement necessary within team members.

We Must Not Get Complacent

From the survey data, we saw that the investment made in training for customer success corresponded to the size of the CS team. This is logical and means that we should apply an obvious rule in this case - the larger the organization, the more money is spent on training. While it's not necessarily a simple exponential calculation, we can infer that the size of a customer success organization typically tracks closely to larger budgets and revenue of the company they belong to. But as a 2019 US research study by [The Industry Report shows](#), it's not always the case, and occasionally education investment doesn't rise at the same rate as employment. One of their findings of training expenditures was that "Average training expenditures for large companies decreased from $19.7 million in 2018 to $17.7 million in 2019. The number for midsize companies dipped $400,000 to $1.7 million in 2019. Small companies barely increased from $355,731 to $367,490." This while we know that US employment grew each of those two years for companies in those classifications.

Additionally, there is something more nuanced at play in this particular question about how spending tracks to the size of the CS team. Since larger companies typically provide more solutions to the market, it makes sense then that the customer success organization would take on more responsibility for customers that purchase more than one solution.

Business leaders look for efficiencies where they present themselves, and scaling customer success by increasing the Customer Success Manager (CSM) to account ratio is a common tactic. Those CSMs bearing increased ratios - depending on the level of engagement (low, high, etc.) – can end up serving customers with a broad range of focus, need, expectations, and skills. That spells complexity for customer success. And, of course, complexity complicates the effort to train and educate CSMs to the level required to serve such customers. So even though some companies may invest more in training, ee can see it is not at sufficient levels when we correlate the high value in the responses to the question, "How complex or difficult to implement or drive value from is the typical solution you sell?"

and with the low value in the responses to the question, "Which of the following types of training have you provided your team with in the last 12 months?"

Companies recognize the complexity and acknowledge that it is a challenge for customers to receive the value they need from solutions (which calls into question the ability of CSMs to deliver what customers need). While at the same time, they are providing low levels of training opportunities for the CSMs. Increased revenue for companies is often accompanied by more complicated ways to operate and necessitates a deeper plan for enabling teams across the customer lifecycle to operate efficiently.

Survey Results

Survey Results

1 Survey Format and Questions

The Attitudes to Training, Certification, & CPD 2020/21 Survey was conducted over six months between October 2020 and March 2021. Only Customer Success Leaders/Department Heads were invited to participate, although there was no checking of role or position, so in essence anyone could have responded. In total we received 219 survey responses, all of which were complete and appeared legitimate. Responses came from all over the world, and from a wide variety of company types and sizes, allowing us to subdivide response information by a number of categories (more details later). In order to attract survey responses we advertised via our own newsletter and social media posts, and in addition we partnered with nine other "sponsor" companies who helped us by publicizing thechannels in addition to ours. Thank you to our sponsors ClientSuccess, Totango, Gainsight, Insided, PIE, CSM Practice, Custify, Oracle and Churn Zero for their kind assistance, which we very much appreciate.

There were no selection or rejection criteria except for the application of common sense, but in the event all responses were included within the data used in the analysis. All respondents were requested to include their first name, last name, and email address, and this may have helped to deter any inaccurate or rogue responses, none of which were received SFAWK.

The survey contained 40 questions, of which seven questions were related purely to classification and the remaining 33 questions actually formed the substance of the analysis. The responses to these 33 questions were divided into three equal sections, each therefore containing eleven data points for analysis per section. The three sections for analysis were "Scope of Capability", where the CS team's current capabilities were analyzed, "Scope of Needs", where the requirements placed upon the CS teams was reviewed, and finally "Training Activity" where we looked at the investments currently being made in training, certification and CPD.

Because the survey process was entirely online and automated, and because we also wanted to limit the answer possibilities to just a small number of options, it was important to provide simple questions that could be answered by selecting a response from the options shown. This approach did have its limitations, but given the budget and resources available to us, it was the only sensible approach to take. We took care in devising the questions to make each question clear and simple to understand, and not to be ambiguous or interpretable in more than one way. Care was also taken to ensure that response options both did not overlap (potentially causing confusion as to which option to select) and provided comprehensive coverage (to make sure there was an appropriate response shown for every CS leader to select). Overall we believe we performed reasonably well, but lessons were learned and will be applied to question and response designs for future surveys.

Overleaf we have re-created the Survey Questionnaire as the CS Leader would have seen it as they completed the survey online.

Customer Success Leadership Survey

Instructions

Work your way through the questions, providing your responses in the format requested. All questions are mandatory and must be answered. For MNCs you can elect to answer for your region or group only. **ALL YOUR ANSWERS ARE COMPLETELY CONFIDENTIA**L, your responses will not be shared with any third party.

| SECTION ONE: About Your Company | 0% |

Q1 Where is your company's Head Office?*
Please select one (only) option from the range shown

- USA
- Canada
- South/Central America
- UK
- Ireland
- India
- Other - EMEA
- Asia-PAC

Q2 Where does your company operate?*
Please select all options that apply to you

- USA
- Canada
- South/Central America
- UK
- Ireland
- India
- Other - EMEA
- Asia-PAC

Q3 What is the annual turnover of your company in US$?*
Please select one (only) option from the range shown

- $0 to $500k
- $500k to $1m
- $1m to $5m
- $5m to $10m
- $10m to $100m
- $100m to $500M
- $500m to $1BN
- Over $1BN

Q4 Which of the following best describes your company's ownership?*
Please select one (only) option from the range shown

- Privately owned with no external investment
- Privately owned with Angel or VC seed funding
- Privately owned with VC Series A Funding
- Privately owned with VC Series B Funding
- Privately owned with VC Series C or higher Funding
- Publically traded
- Other / Don't Know

Q5 Which of the following best describes what your company sells?*
Please select all options that apply to you

Your own software (SaaS)

Your own software (non-renewing)

Other software (SaaS)

Other software (non-renewing)

Managed Services (contract)

Managed Services (non-renewing)

Professional Services (contract)

Professional Services (non-renewing)

IT hardware

Other services

Other products

Q6 What is the typical value of an average purchase?*
Please select one (only) option from the range shown

$0 to $1k

$1k to $5k

$5k to $20k

$20k to $50k

$50k to $150k

$150k to $500k

$500k to $1m

Over $1m

Varies, but typically under $100k

Varies, but typically over $100k

Q7 What percentage of an average purchase is typically for renewable services?*
Please select one (only) option from the range shown

None

Up to 25%

25 to 50%

50 to 75%

75 to 100%

100%

Don't Know

Q8 How complex or difficult to implement or drive value from is the typical solution you sell?*
Please select one (only) option from the range shown

Very simple to implement or drive value from

Reasonably simple to implement or drive value from

Somewhat complex to implement or drive value from

Very complex to implement or drive value from

It varies a lot from customer to customer

Don't Know

SECTION TWO: About Your Team

20%

This section is all about your Customer Success team. Answering these questions helps us to understand a little bit about your team's size, make-up, activities and the way you work.

Q9 How many Customer Success Managers are in your team (dedicated full time or FTE)?*
Please select one (only) option from the range shown

None

1

2 to 5

6 to 10

11 to 20

21 to 40

41 to 100

101 to 500

501 or more

Q10 Aside from dedicated Customer Success Managers, how many other customer facing professionals are at least partially involved in some Customer Success Management activities (eg onboarding, training, support, etc)?
Please select one (only) option from the range shown

None
1
2 to 5
6 to 10
11 to 20
21 to 40
41 to 100
101 to 500
501 or more

Q11 What is the level of Customer Success Management experience of your team?

Please select one (only) option from the range shown

Up to 6mths	%	6mths to 1yr	%	1 to 2 yrs	%	5yrs +	%

The counter should indicate 100% -> Your total is currently 0%

Q12 How would you describe the level of maturity of your Customer Success function as a whole?*
Please select one (only) option from the range shown

Very New - little to no infrastructure and best practices in place
Fairly New - some basic infrastructure and best practices in place
Average - standard infrastructure and best practices in place
Above Average - good quality infrastructure and best practices in place
Mature - high quality infrastructure and best practices in place
Don't Know

Q13 Which of the following activities is your team PRIMARILY responsible for?*
Please select all options that apply to you

> Installation and/or Implementation
>
> Customer Onboarding
>
> Customer Adoption
>
> Customer Training
>
> Customer Product Support
>
> Customer Service Support
>
> Customer Value Realization
>
> Customer Renewals
>
> Customer Pilots and /or Trials
>
> Customer Advocacy
>
> Customer Experience

Q14 Which of the following activities is your team involved in but NOT PRIMARILY responsible for?*
Please select all options that apply to you

> Installation and/or Implementation
>
> Customer Onboarding
>
> Customer Adoption
>
> Customer Training
>
> Customer Product Support
>
> Customer Service Support
>
> Customer Value Realization
>
> Customer Renewals
>
> Customer Pilots and /or Trials
>
> Customer Advocacy
>
> Customer Experience

SECTION THREE: Current Training Activities

40%

Congratulations you are nearly half way through! In this section we'd like you to describe your current activities in terms of training, certification and CPD.

Q15 Which of the following best describes your Customer Success team's new recruit onboarding process?*
Please select one (only) option from the range shown

> No standard process is used
>
> The new recruit is asked to plan and manage their own induction needs and to request help from others as needed
>
> The new recruit is coached/mentored by the team leader
>
> The new recruit is assigned to be coached/mentored by an existing team member
>
> The new recruit goes through a carefully thought out induction training and coaching program
>
> Other / Don't Know

Q16 How much do you spend on training (per team member, per annum) in US$?*
Please select one (only) option from the range shown

> Less than $100
>
> $100 to $250
>
> $250 to $500
>
> $500 to $750
>
> $750 to $1,000
>
> $1,000 to $1,500
>
> More than $1,500

Q17 Which of the following types of training have you provided your team with in the last 12 months?*
Please select all options that apply to you

> Classroom workshops up to 1 day in duration led by an external trainer (virtual or face-to-face)
>
> Classroom workshops over 1 day in duration led by an external trainer (virtual or face-to-face)
>
> Classroom workshops up to 1 day in duration led by yourself or a team member (virtual or face-to-face)
>
> Classroom workshops over 1 day in duration led by yourself or a team member (virtual or face-to-face)
>
> Books or other written materials published outside of your own organization
>
> Books or other written materials published within your own organization
>
> Online self-study training programs
>
> Formal coaching/mentoring sessions within a program (team based)
>
> Formal coaching/mentoring sessions within a program (one-to-one)
>
> Informal or ad hoc coaching/mentoring sessions (team based)
>
> Informal or ad hoc coaching/mentoring sessions (one-to-one)

Q18 How do you decide what types of training to provide your team with?*
Please select one (only) option from the range shown

> The CS Leader decides with no input from the team
>
> The CS Leader decides after discussion with or input from team members
>
> The decision is made by negotiation with the team members
>
> The decision is primarily made by external authorities (eg HR or Training functions)
>
> The decision is made by negotiation between the Team Leader and external authorities (eg HR or Training functions)
>
> Other / Don't Know

Q19 Which of the following factors contribute to your training provisioning decisions, and by how much?

Please select Low, Medium or High for each item).

Expressed needs or desires of the team members*	Low
Requirements determined by the CS Leader*	Low
Available time of team members for training activities *	Low
Available budget for training activities*	Low
Requirements from HR, Training or other Functions *	Low
Other*	Low

Q20 How do you encourage proactive knowledge and skills development in your team members?*
Please select all options that apply to you

> Financial incentives (individual)
>
> Financial incentives (team)
>
> Praise and acknowledgement (in private)
>
> Praise and acknowledgement (in front of team)
>
> Formal targets discussed, agreed and reviewed in annual reviews
>
> Informal targets discussed, agreed and reviewed outside of annual reviews
>
> Other

SECTION FOUR: Potential Training Requirements	60%

Well done, you are well over halfway... plus many of the questions in this section are very quick and easy to complete! This section provides us with information about your potential training, certification and CPD requirements.

Q21 On a scale of 1 to 10, how busy is your team overall?
Please rate your response from 1 (very low) to 10 (very high)

★ ★ ★ ★ ★ ★ ★ ★ ★ ★

Q22 On a scale of 1 to 10, how effective is your team overall?
Please rate your response from 1 (very low) to 10 (very high)

★ ★ ★ ★ ★ ★ ★ ★ ★ ★

Q23 On a scale of 1 to 10, how efficient is your team overall?
Please rate your response from 1 (very low) to 10 (very high)

★ ★ ★ ★ ★ ★ ★ ★ ★ ★

Q24 On a scale of 1 to 10, how fast is your team growing in terms of size?
Please rate your response from 1 (very low) to 10 (very high)

★ ★ ★ ★ ★ ★ ★ ★ ★ ★

Q25 On a scale of 1 to 10, how rapidly is your team needing to adapt to meet changing needs?
Please rate your response from 1 (very low) to 10 (very high)

★ ★ ★ ★ ★ ★ ★ ★ ★ ★

Q26 On a scale of 1 to 10, how mature is the support for your team in terms of systems, processes, tools, frameworks, playbooks, etc?
Please rate your response from 1 (very low) to 10 (very high)

★ ★ ★ ★ ★ ★ ★ ★ ★ ★

Q27 Please rate the relative importance of these core subject areas for your team

Please select Low, Medium or High for each item).

Customer Success Management functions and best practices *	Low ⌄
The products, services and solutions your company sells *	Low ⌄
The industry or functional area your customers come from *	Low ⌄
Soft skills and personal development*	Low ⌄
Your company's tools, systems and processes*	Low ⌄
Other*	Low ⌄

Q28 How uniform (or standardized) is each of your team member's approach to delivering Customer Success?*
Please select one (only) option from the range shown

> No uniformity or standardization at all
>
> A small amount of uniformity or standardization for some aspects of the work
>
> A reasonable amount of uniformity or standardization for most of the work
>
> A large amount of uniformity or standardization for most of the work
>
> A large amount of uniformity or standardization for all of the work
>
> Other / I Don't Know

Q29 How many replacement team members do you estimate you will need to recruit for over the next 12 months (ie replacements for staff members that leave)?*
Please select one (only) option from the range shown

> None
>
> 1 to 3 new recruits
>
> 4 to 6 new recruits
>
> 7 to 10 new recruits
>
> 11 or more new recruits
>
> Don't Know

Q30 How many additional team members do you estimate you will need to recruit for over the next 12 months (ie not including replacements for staff members that leave)?
Please select one (only) option from the range shown

> None
>
> 1 to 3 new recruits
>
> 4 to 6 new recruits
>
> 7 to 10 new recruits
>
> 11 or more new recruits
>
> Don't Know

Q31 How do you usually develop a team member to prepare them for a new or additional specific task or role?*
Please select one (only) option from the range shown

> We do not do any training or development of this nature
>
> Ask them to determine their needs and work on their own to develop their knowledge and skills
>
> Ask them to determine their needs and you then provide the training to develop their knowledge and skills
>
> You determine their needs and then provide the training to develop their knowledge and skills
>
> Other / Don't Know

Q32 How do you develop a team member to prepare them for a management/leadership role?*
Please select one (only) option from the range shown

> We do not do any training or development of this nature
>
> Ask them to determine their needs and work on their own to develop their knowledge and skills
>
> Ask them to determine their needs and you then provide the training to develop their knowledge and skills
>
> You determine their needs and then provide the training to develop their knowledge and skills
>
> Other / Don't Know

Q33 How long on average do you retain your Customer Success Manager team members for?*
Please select one (only) option from the range shown

> Less than a year
>
> 1 to 2 years
>
> 3 to 5 years
>
> 5 to 10 years
>
> Over 10 years
>
> Don't Know

Q34 How much on average does it cost to recruit a new team member (including recruitment costs, training costs, reduced productivity costs, your own time, etc)?
Please select one (only) option from the range shown

Less than $1k

$1k to $5k

$5k to $10k

$10k to $20k

$20k to $30k

Over $30k

Don't Know

Q35 Do you conduct exit interviews when a team member leaves, and if so why do they leave?*
Please select all options that apply to you

No exit interview is conducted

Redundancy - reducing staff count

Dissatisfaction on the part of the employee

Dissatisfaction on the part of the employer

Personal reasons (eg relocation to another area)

Move to a more senior/better paid role elsewhere

Other

SECTION FIVE: Training Strategy and Management

80%

This is the final section. In this section we want you to tell us about your planning, strategy and decision making for training, certification and CPD.

Q36 How important to you is the ability to benchmark and prove your CSMs' capabilities through independent certification?*
Please select one (only) option from the range shown

Of no importance at all

Slightly important

Reasonably important

Very important

Essential

Don't Know

Q37 How important to you is the ability to identify and respond to your team members' knowledge and skill gaps?*
Please select one (only) option from the range shown

Of no importance at all

Slightly important

Reasonably important

Very important

Essential

Don't Know

Q38 How is your training budget and/or spending determined?*
Please select one (only) option from the range shown

An annual per staff member or team budget is allocated and cannot be amended or added to

Training spending is requested on an ad hoc, as-needed basis

An annual per staff member or team budget is allocated and additional training sending is requested on an ad hoc, as-needed basis

There is no budget for or spending on training

Other / I Don't Know

Q39 How do you measure and report on training activities?*
Please select all options that apply to you

No standard process is used

Team members are expected (but not required) to track and record their own training activities and report on them if/when asked to do so

Team members are formally required to track and record their own training activities and report on them if/when asked to do so

All training is recorded in a centralized HR (or similar) management system

No measurement and/or reporting takes place

Other / Don't Know

Q40 How do you currently measure and report on team member training?*
Please select all options that apply to you

No measuring or reporting takes place

Staff members are asked to evaluate the effectiveness of the training they undergo

Trainers are asked to evaluate the effectiveness of the training they provide

"Before and After" knowledge and/ or capability analyses are conducted

"Before and After" performance and/ or productivity analyses are conducted

Customers are surveyed

Other / Don't Know

SECTION SIX: Your Chance to Have a Say

100%

2 Overall Survey Responses

Scope of Capability

The scope of capability provides a dynamic understanding of the reality in which Customer Success teams currently work. It measures overall effectiveness at the things CS Teams do, whilst taking practical "size" and "scope" issues into consideration. Of interest to us was to understand both the overall breadth and depth of activities that CS teams are asked to perform and the levels of competence and confidence that are displayed for these activities. In addition we also wanted to understand the rate of change being experience by CS teams and to examine whether this was in itself having an impact on CS Team capability.

The following survey response data was analyzed:

- **Average Deal Sizes Supported**

- **Levels of Change Experienced**

- **Levels of Workload Experienced**

- **Systems & Processes Currently Implemented and Available**

- **Team Experience Levels**

- **Team Maturity Levels**

- **Team Responsiveness Levels**

- **Team Effectiveness Levels**

- **Team Efficiency Levels**

- **Team Measurement & Reporting Capabilities**

- **Individual Measurement & Reporting Capabilities**

Overleaf we show the overall responses from all 219 survey respondents for the "Scope of Capability" section of the Survey.

Scope of Capability
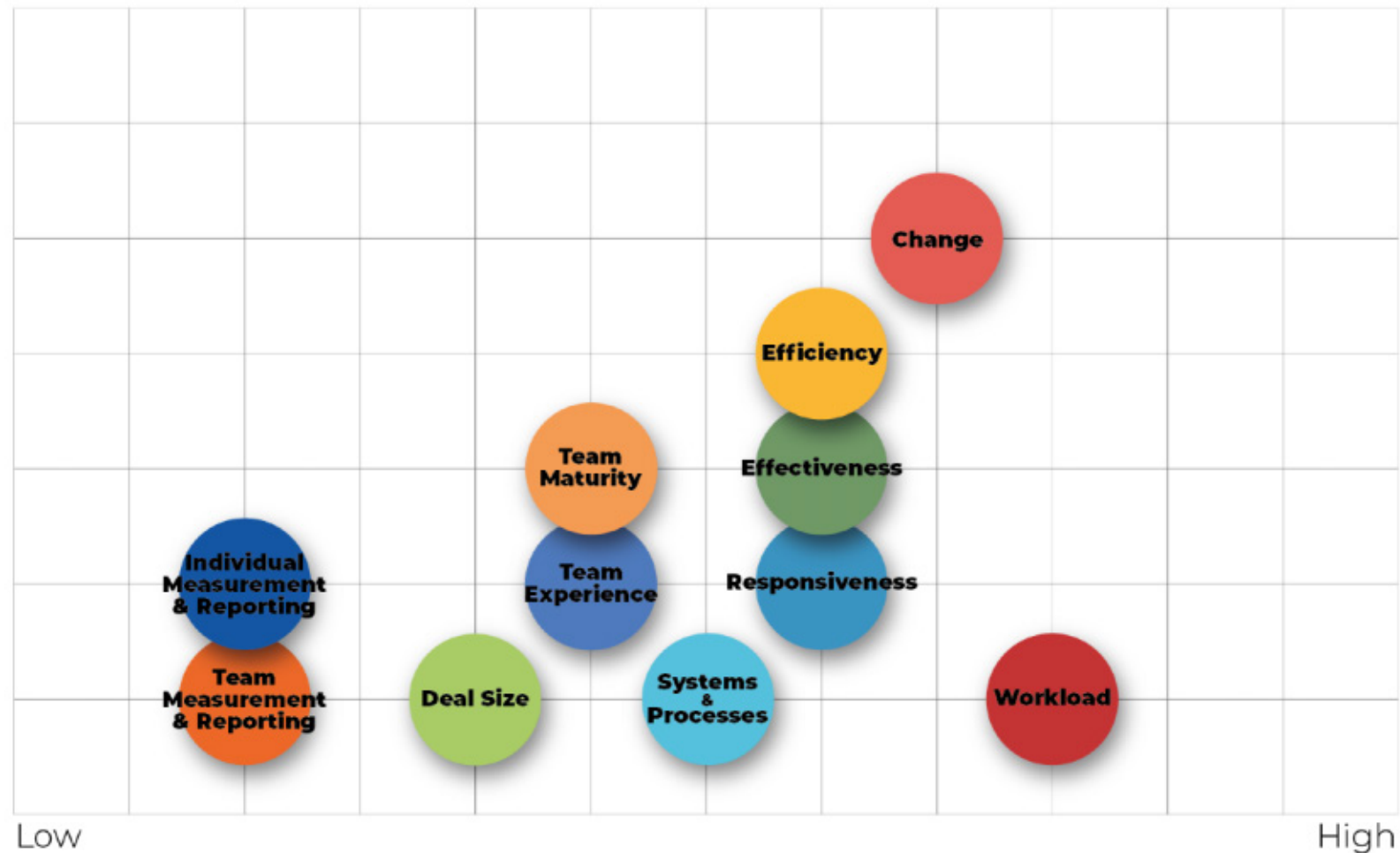
Scope of Needs

The scope of needs focused upon two aspects. Firstly we looked at the demands placed upon the CS Team – both individually and overall as an entire load. We wanted to understand the range and diversity of activities within these demands and what (if any) impact this might have on efficiency, effectiveness and quality of service. Secondly we asked about the direction of travel, and looked at your situation from the perspective of the journey you are going on to complete your mission and fulfil your vision as the CS Team within a wider company with its own strategic vision and strategies.

The following survey response data was analyzed:

- **Product Range**

- **Areas of Importance**

- **Renewable Contracts**

- **Replacement Recruitment**

- **Product Complexity**

- **Additional Recruitment**

- **Primary Responsibilities**

- **Retention**

- **Additional Responsibilities**

- **Recruitment Costs**

- **Growth**

Overleaf we show the overall responses from all 219 survey respondents for the "Scope of Needs" section of the Survey.

Scope of Needs

Low   High

Bubbles on chart: Retention, Recruitment Costs, Areas of Importance, Additional Recruitment, Growth, Replacement Recruitment, Additional Responsibilities, Product Range, Primary Responsibilities, Product Complexity, Renewable Contracts
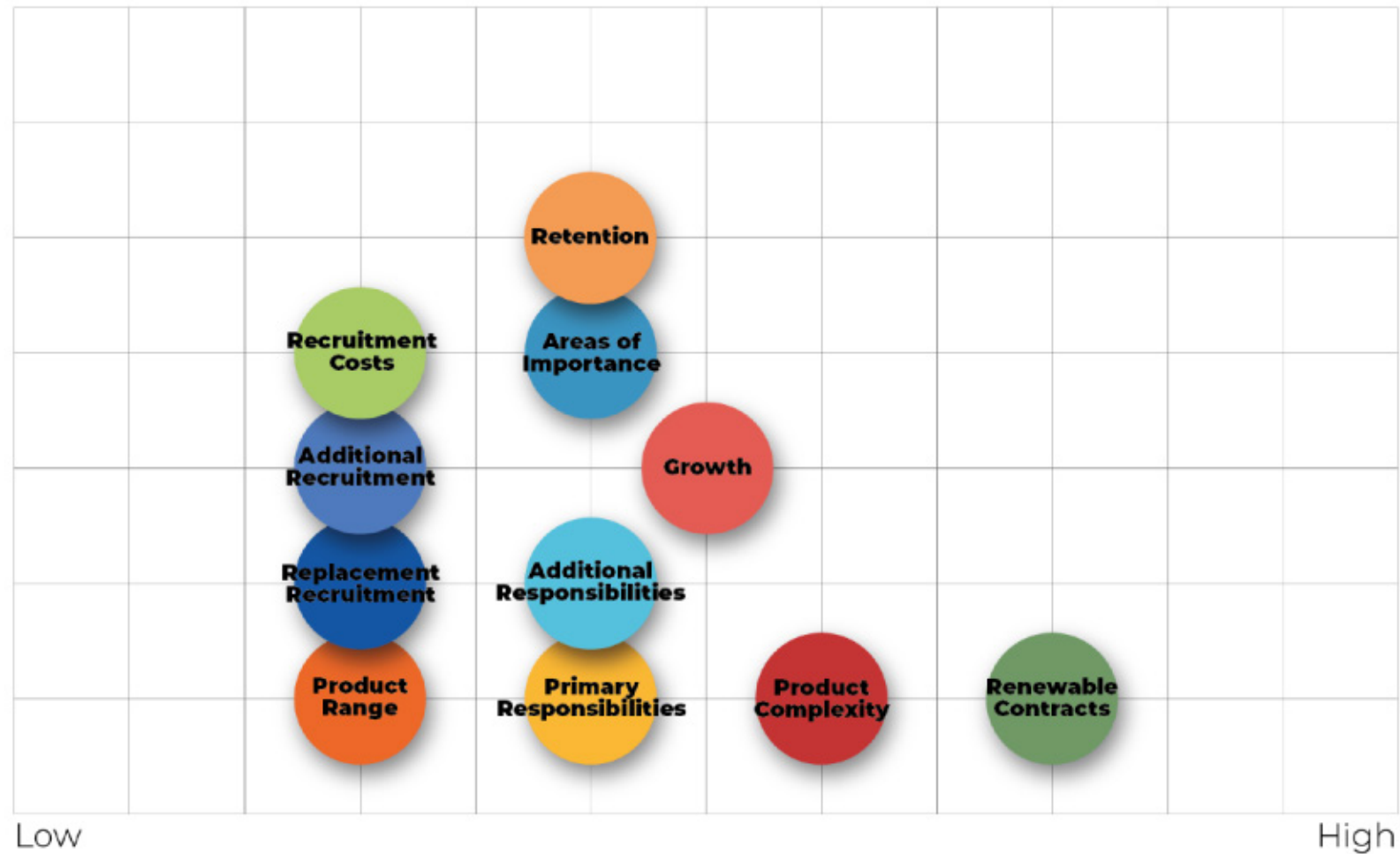
Training Activity

The first section – Scope of Capability – focused on current performance and the second section – Scope of Needs – focused on current and anticipated requirements. This third section – Training Activity – looks at the ways in which Customer Success Teams hope to bridge the gap between current performance and current/future requirements, and assesses the relative ease or difficulty of accomplishing this. As well as examining what CS teams are doing and how they are going about doing those things (as related to team and individual training, certification and CPD) we also thought it essential to understand not just the what and the how, but also the how much or the priority to be accorded to each task or activity, and this is what is primarily documented with the training activity data.

The following survey response data was analyzed:

- **Recruit Onboarding**
- **Standardization**
- **Training Spend**
- **Task Development**
- **Types of Training**
- **Leadership Development**
- **Decision Making Process**
- **Benchmarking**
- **Gap Identification**
- **Budget Flexibility**
- **Encouragement**

Overleaf we show the overall responses from all 219 survey respondents for the "Training Activity" section of the Survey.

Training Activity

Low

High
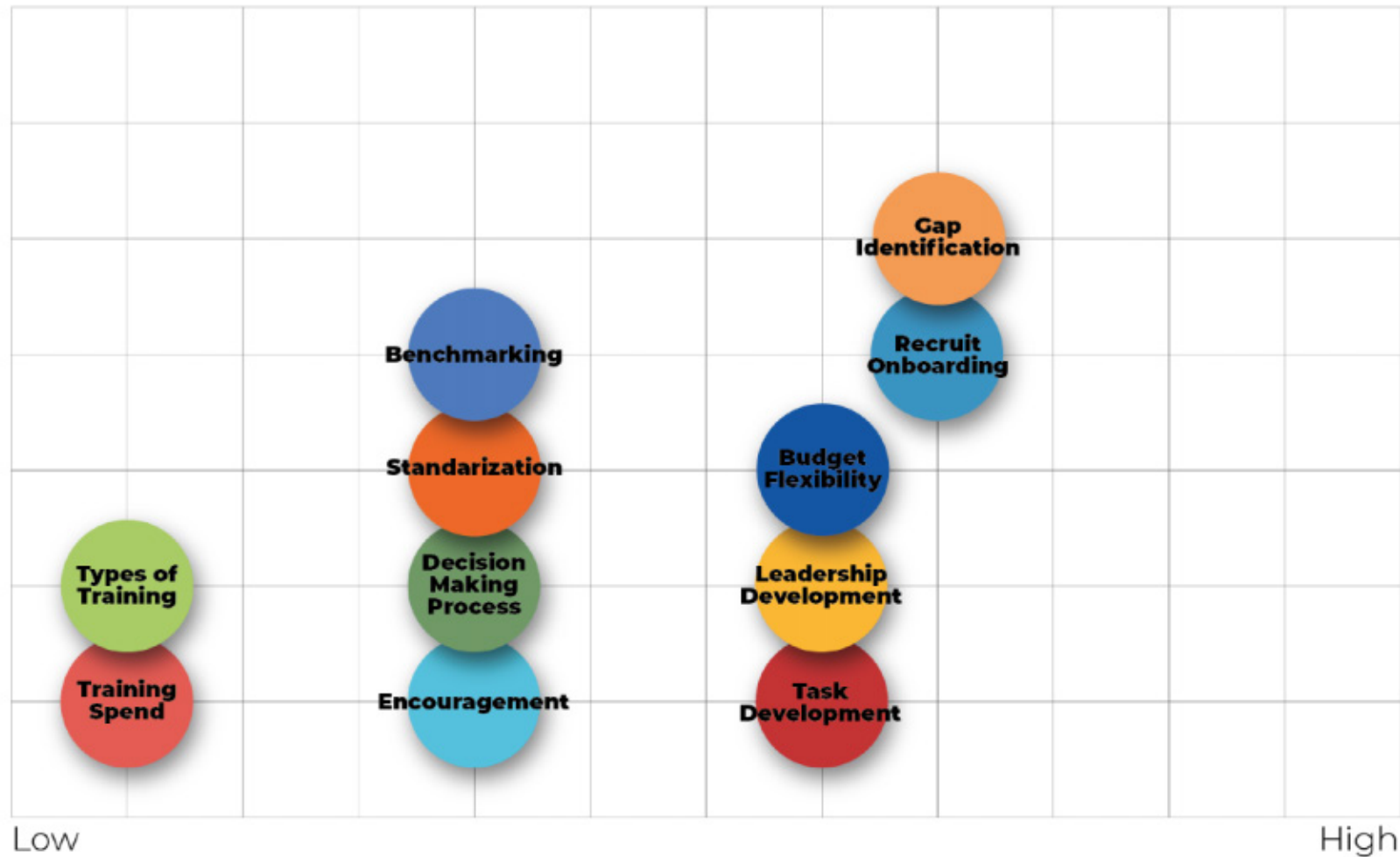
Survey Responses within Categories

As previously mentioned, in addition to providing overall averages for each of the 33 data sets used within the three sections shown above (Scope of Capability, Scope of Needs, and Scope of Training) we also decided to break the data down in a variety of different ways in order to provide a deeper insight into what is currently happening. We decided to use the following criteria for breaking down and categorizing the data:

3 Categorization by Region

The respondents were categorized into regions, based upon their survey responses to the question "Where is your company's Head Office?". The options available for selection were then allocated into the following categories, enabling the authors to analyze and report on any regional variations and similarities that we uncovered.

The regional categories were:

- **USA (48% of responses)**
- **UK (18% of responses)**
- **Everywhere Else (34% of responses)**
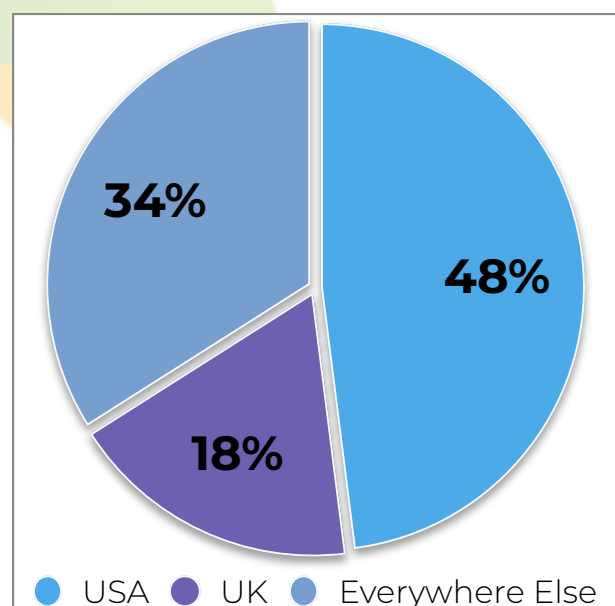
Scope of Capability - US

Low   High
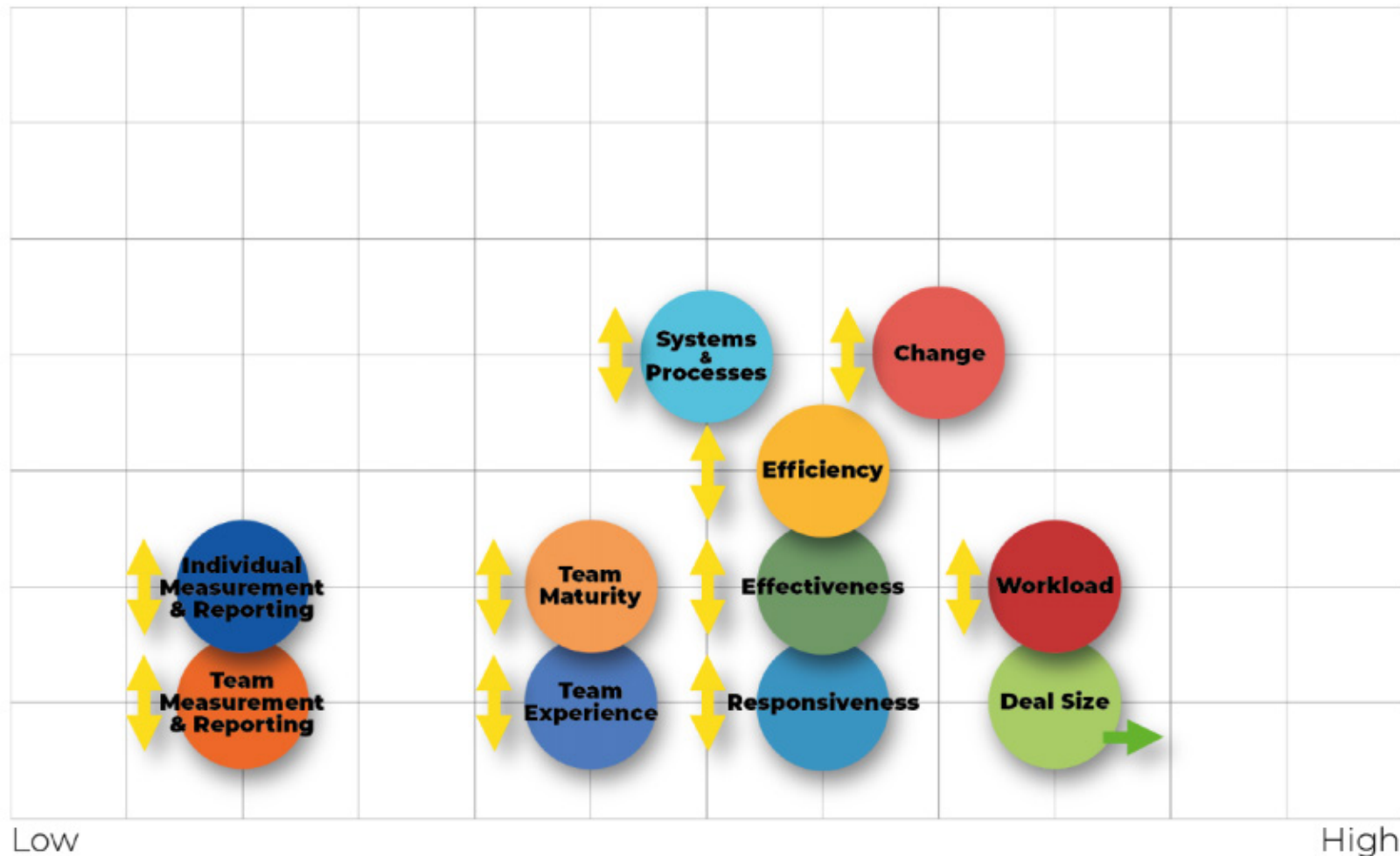
Scope of Capability - UK
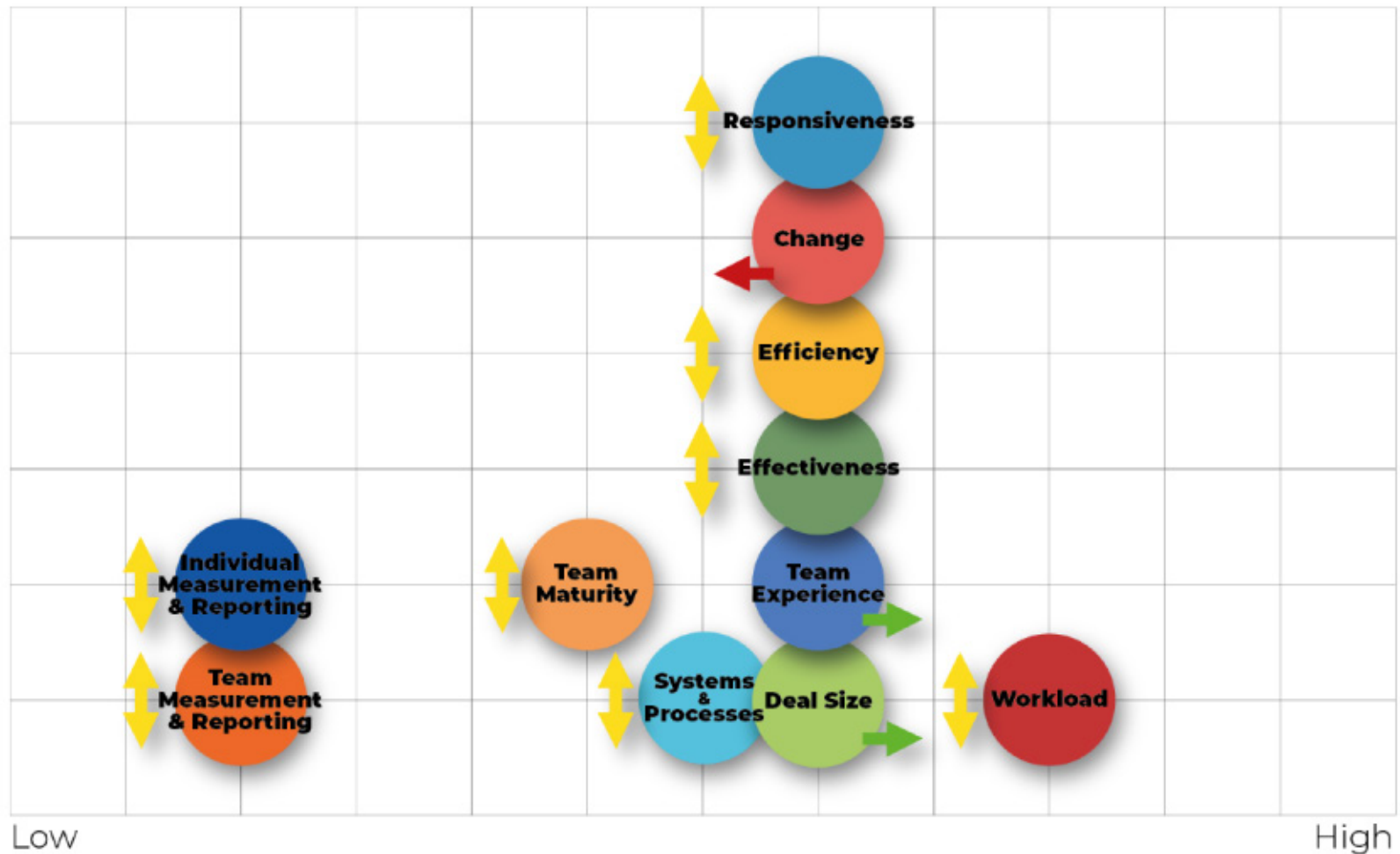
Scope of Capability - Everywhere Else

Low   High

Scope of Needs - US

Low .... High
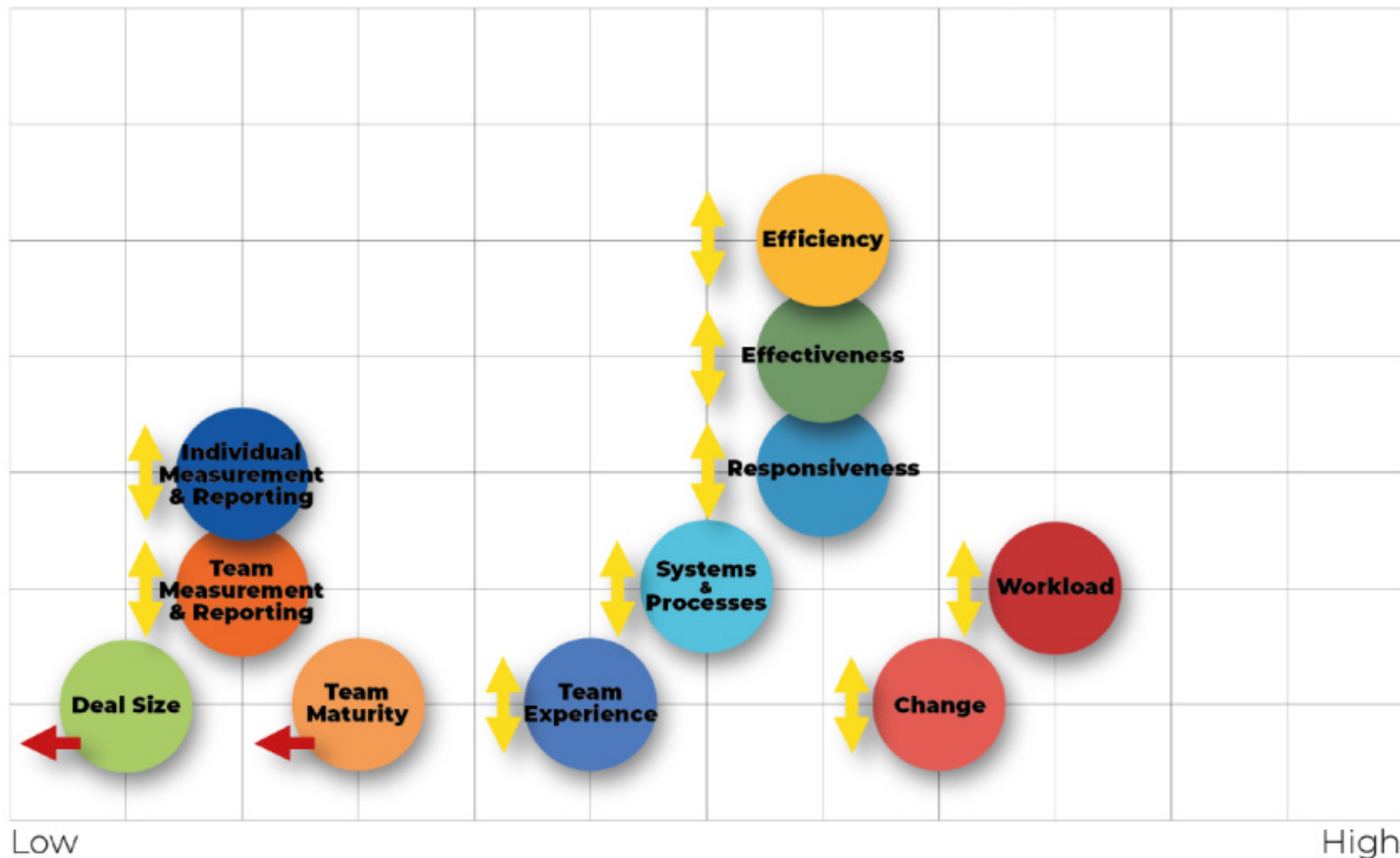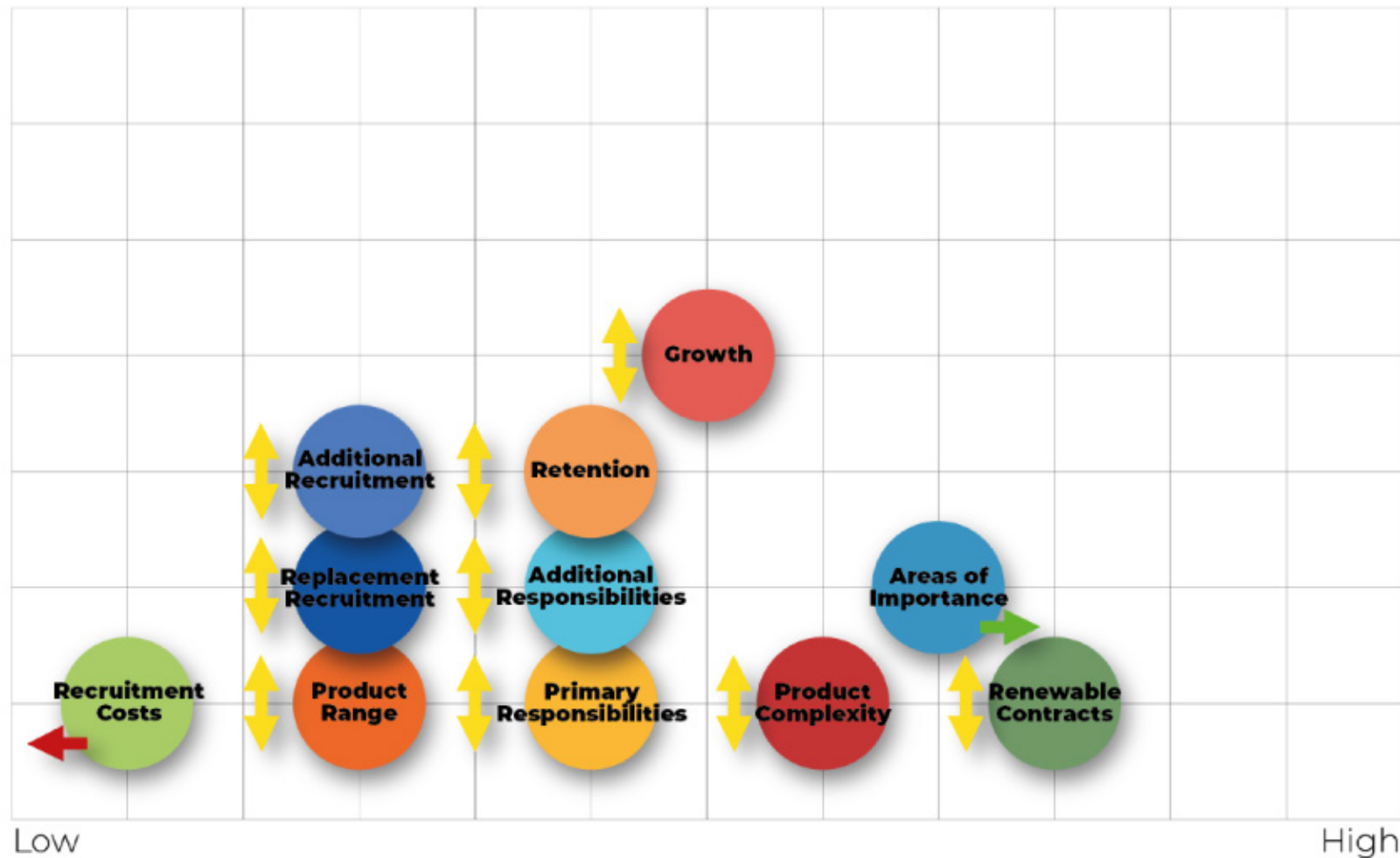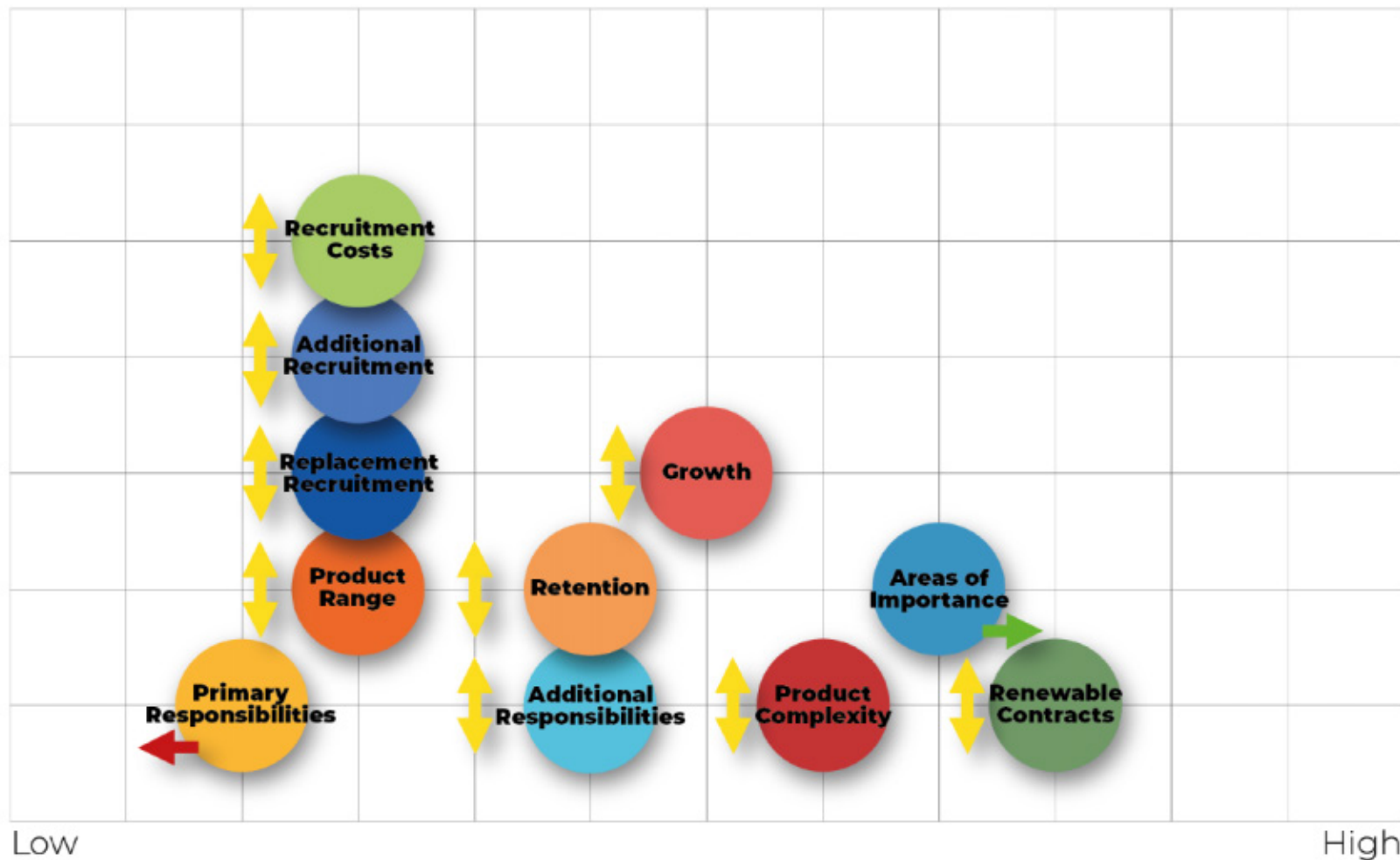
Scope of Needs - UK

Scope of Needs - Everywhere Else
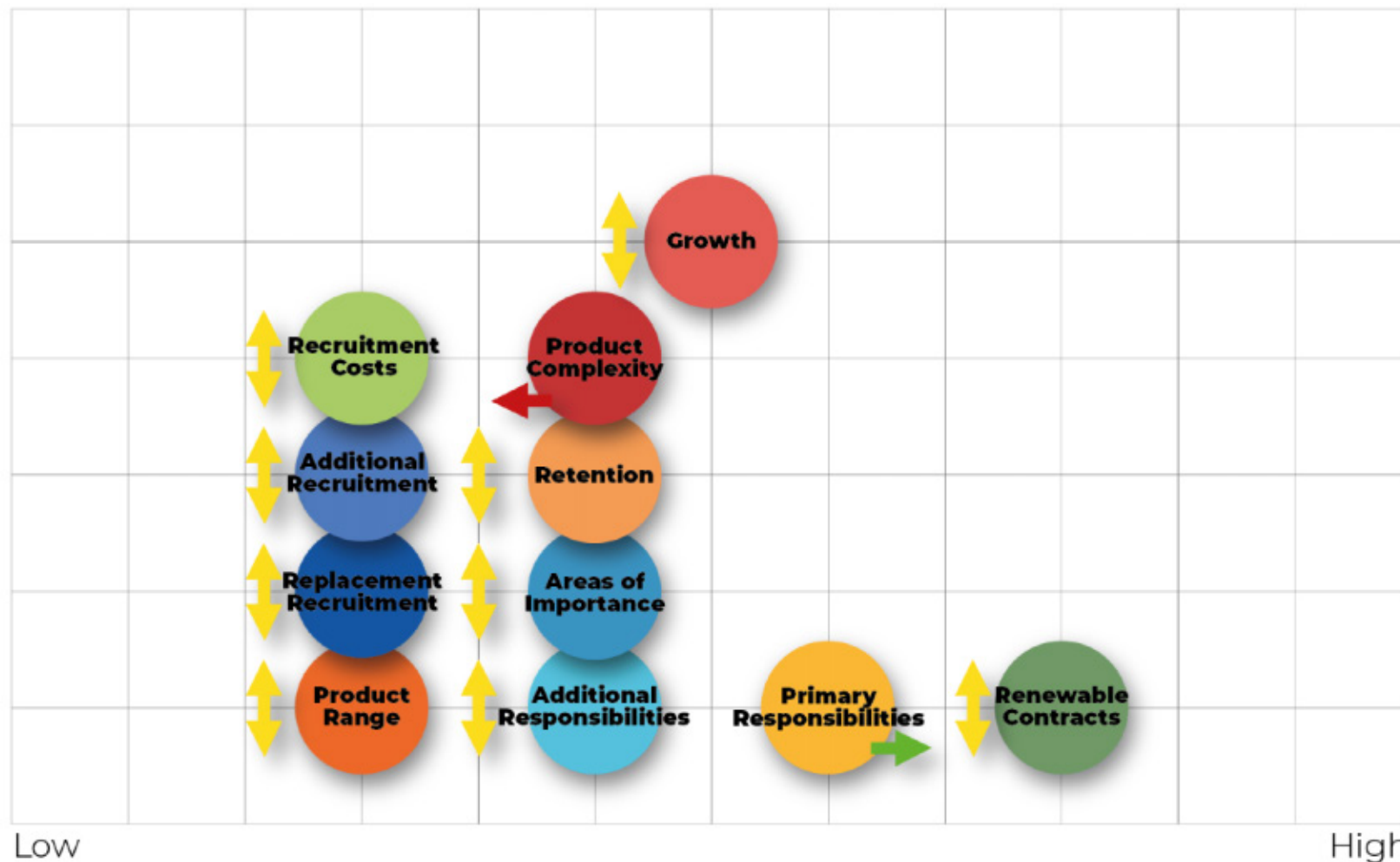
Training Activity - US
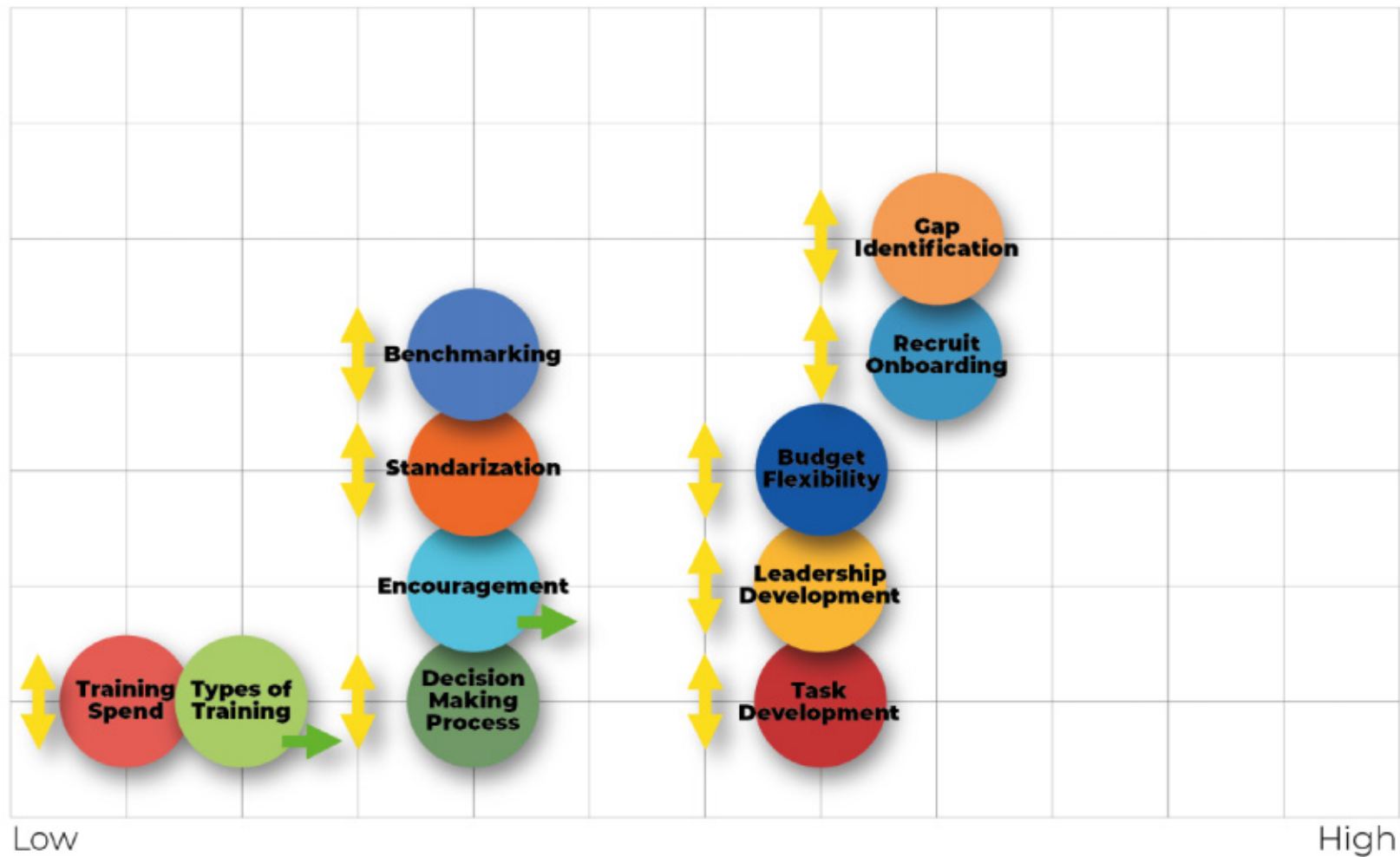
Training Activity - UK
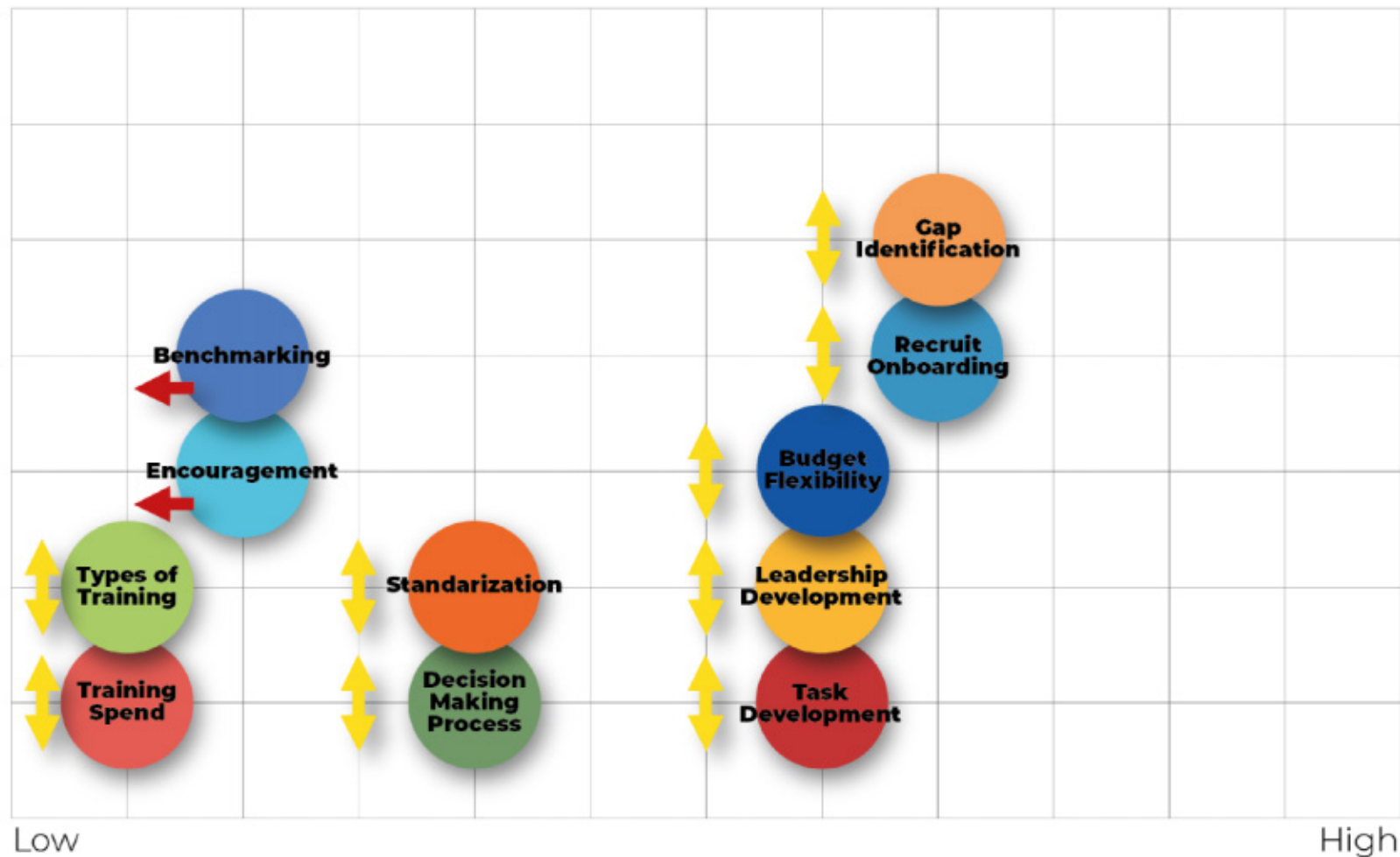
Training Activity - Everywhere Else

Low

High

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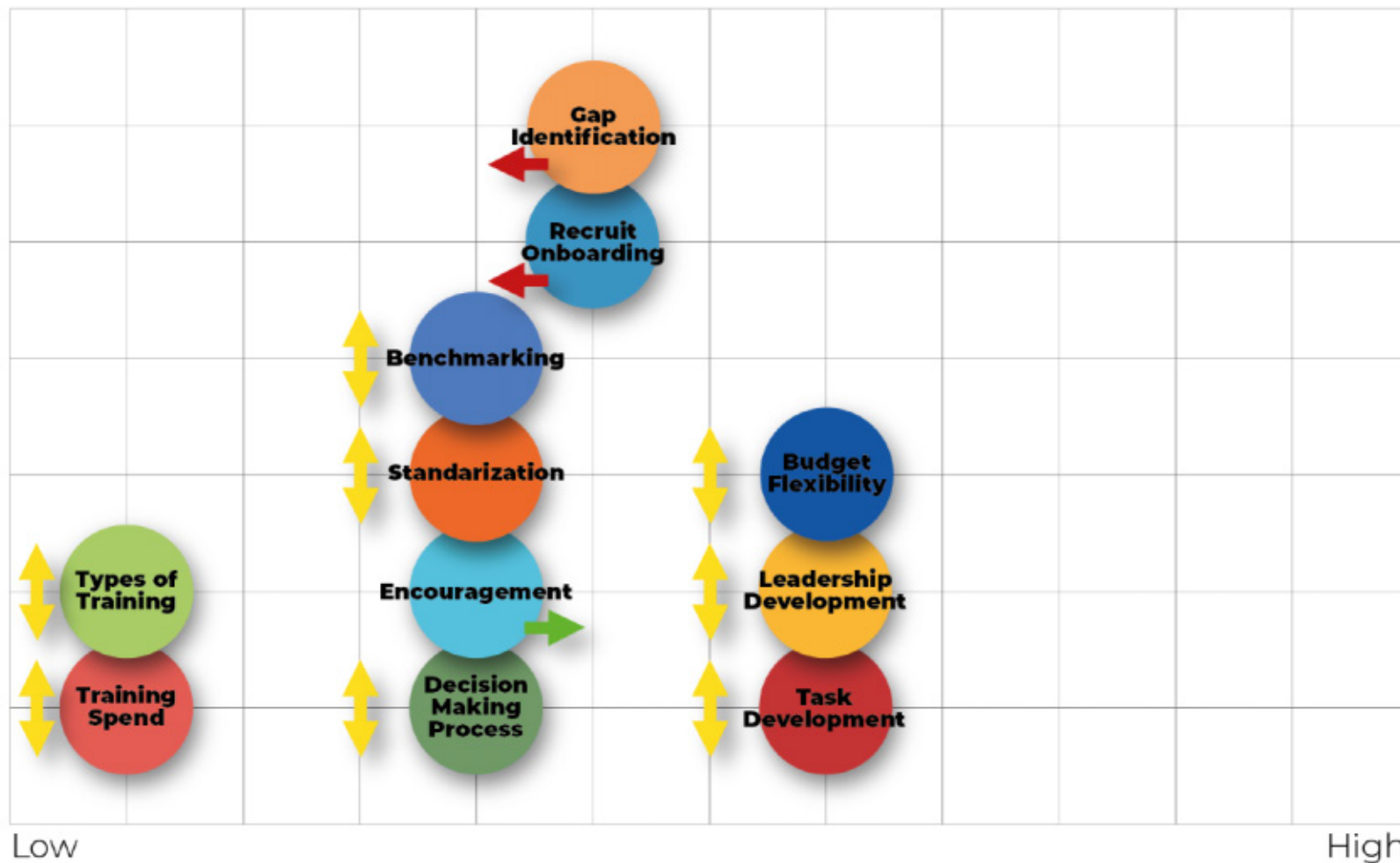
4 Categorization by Revenue

The respondents were also categorized by total annual revenue (including all revenue types, not just recurring revenues for example), based upon their survey responses to the question "What is the annual turnover of your company in US dollars?". The options available for selection were then allocated into the following categories, again enabling the authors to analyze and report on any variations and similarities that we uncovered, but this time based on overall company size.

The revenue categories were:

- **Under US$10 million per annum (44% of responses)**

- **From US$10 million to US$100 million per annum (28% of responses)**

- **Over US$100 million per annum (28% of responses)**

28%
44%
28%

● Under US$10 million per annum
● From US$10 million to US$100 million per annum
● Over US$100 million per annum
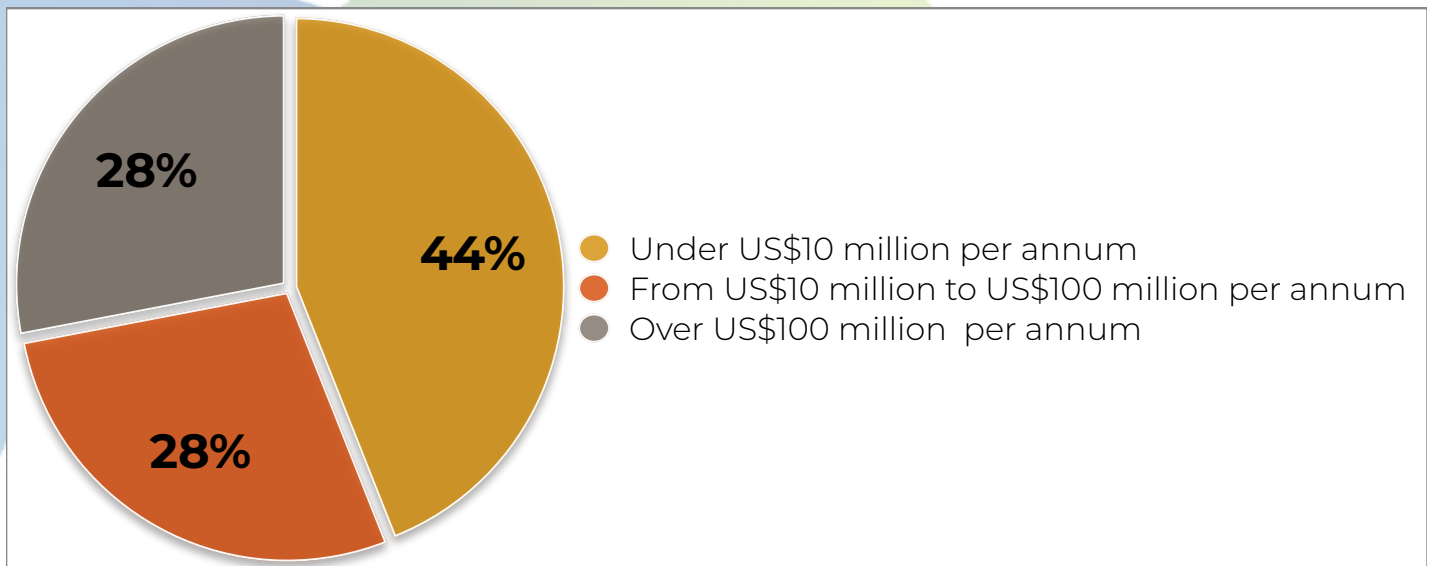
Scope of Capabilities - under $10 million
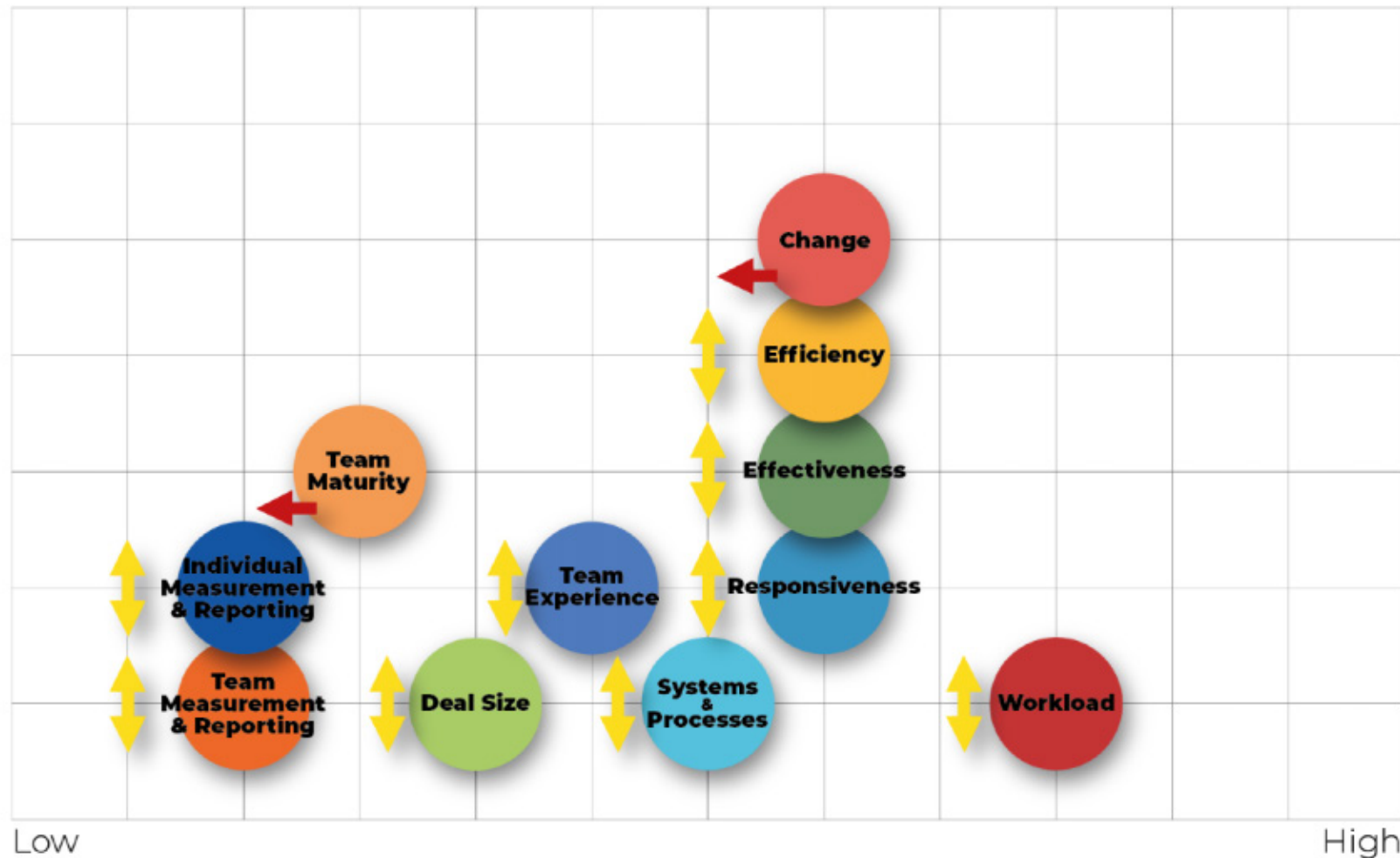
Scope of Capabilities - $10 - $100 million
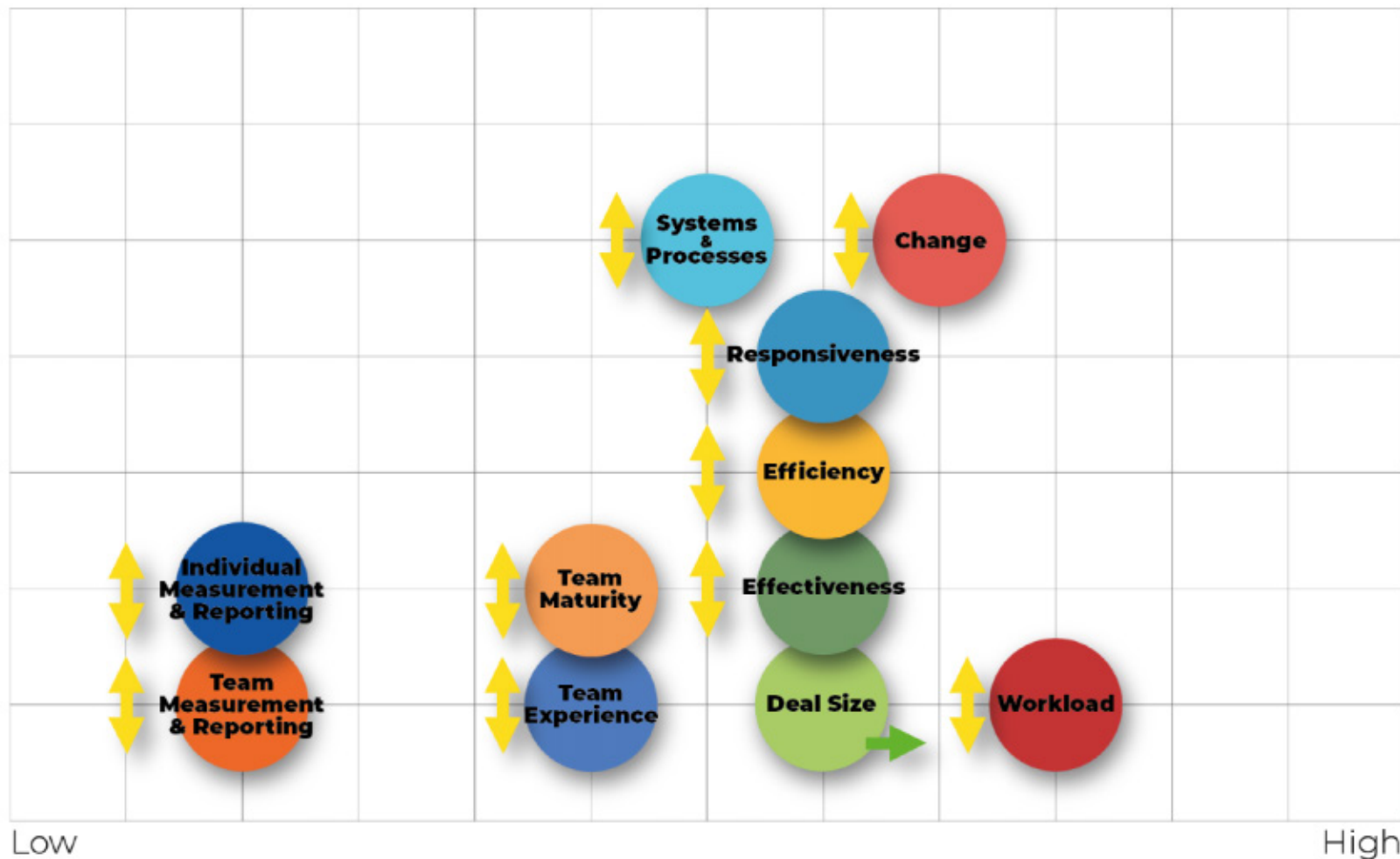
Scope of Capabilities - over $100 million
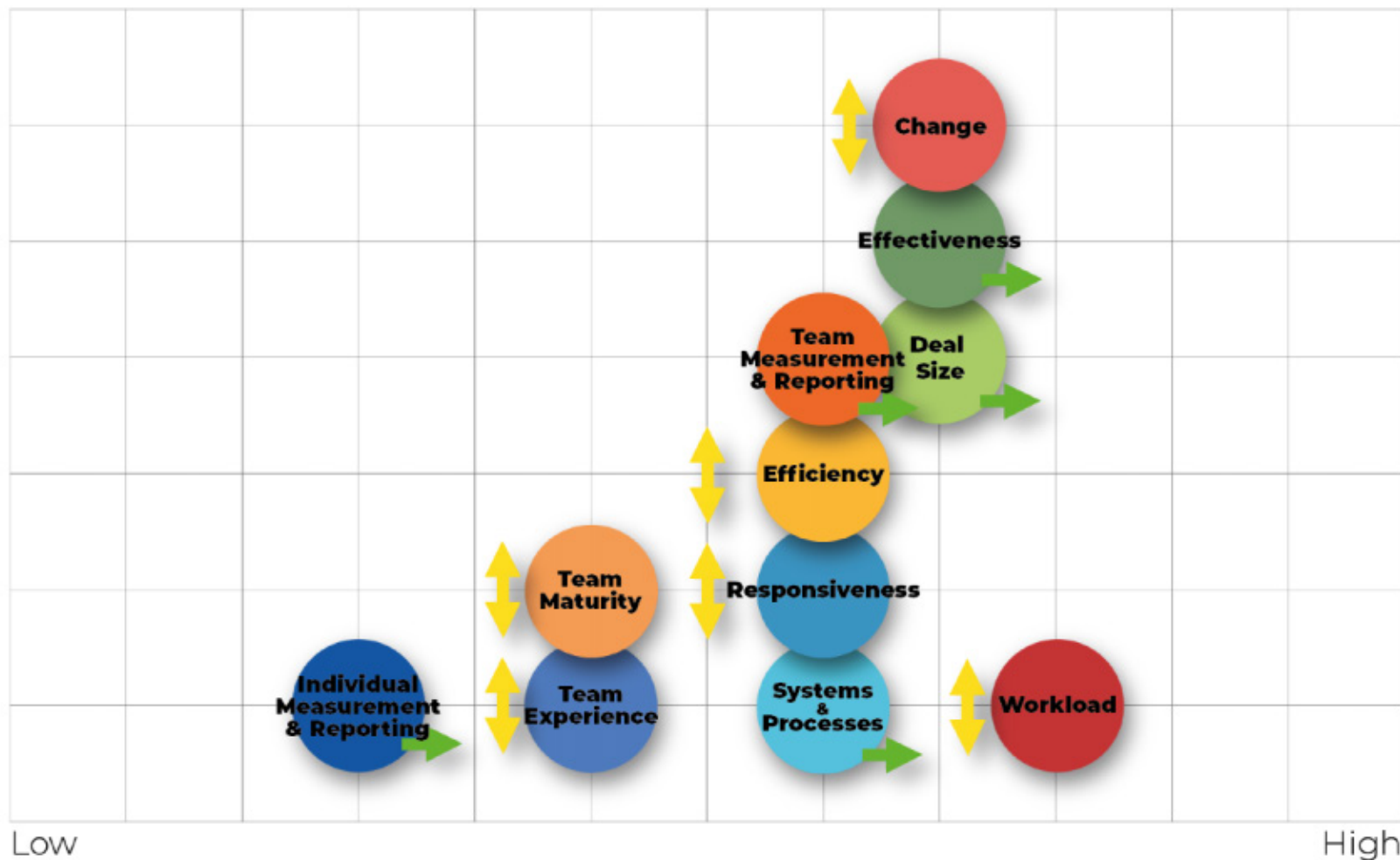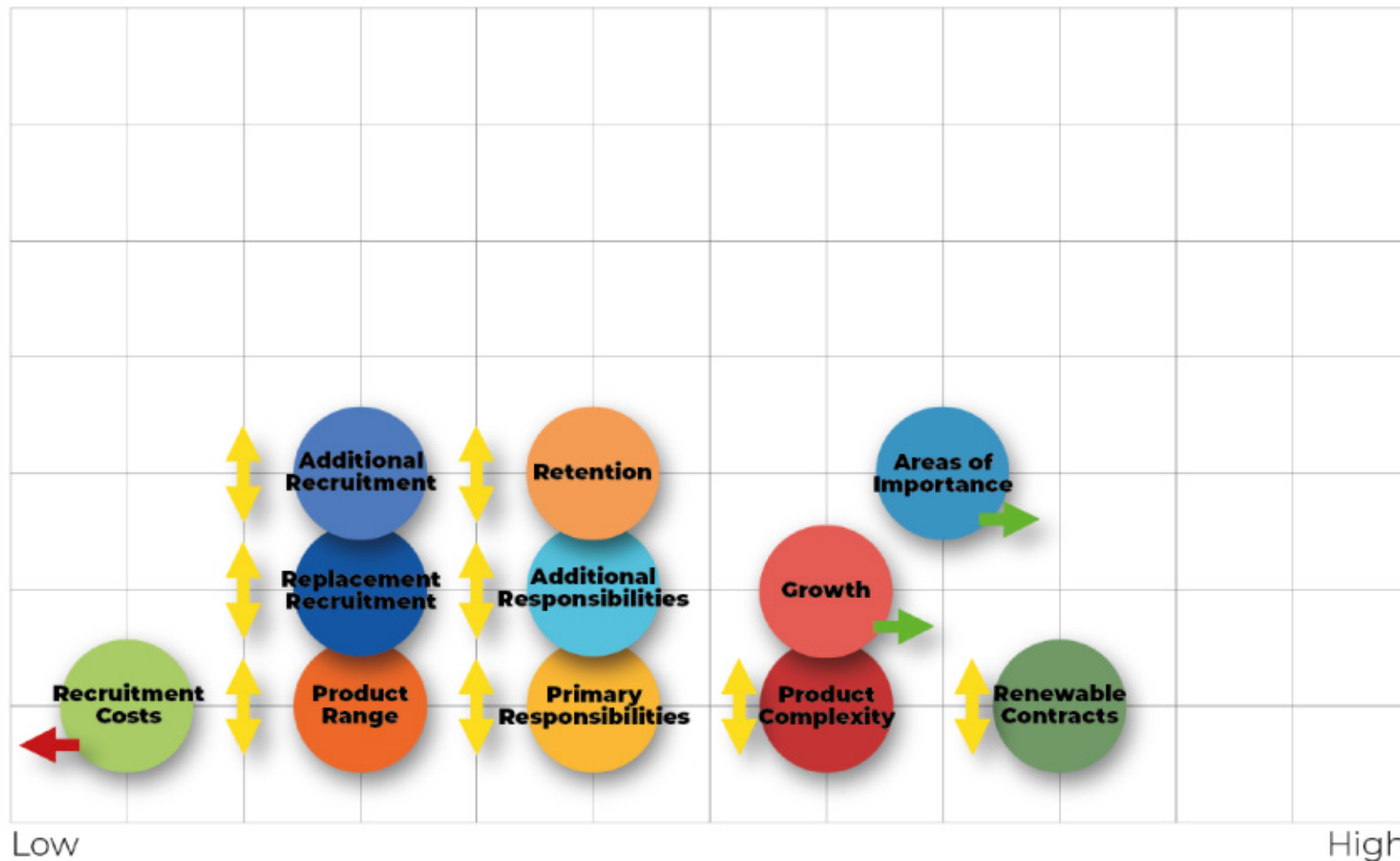
Scope of Needs - under $10 million
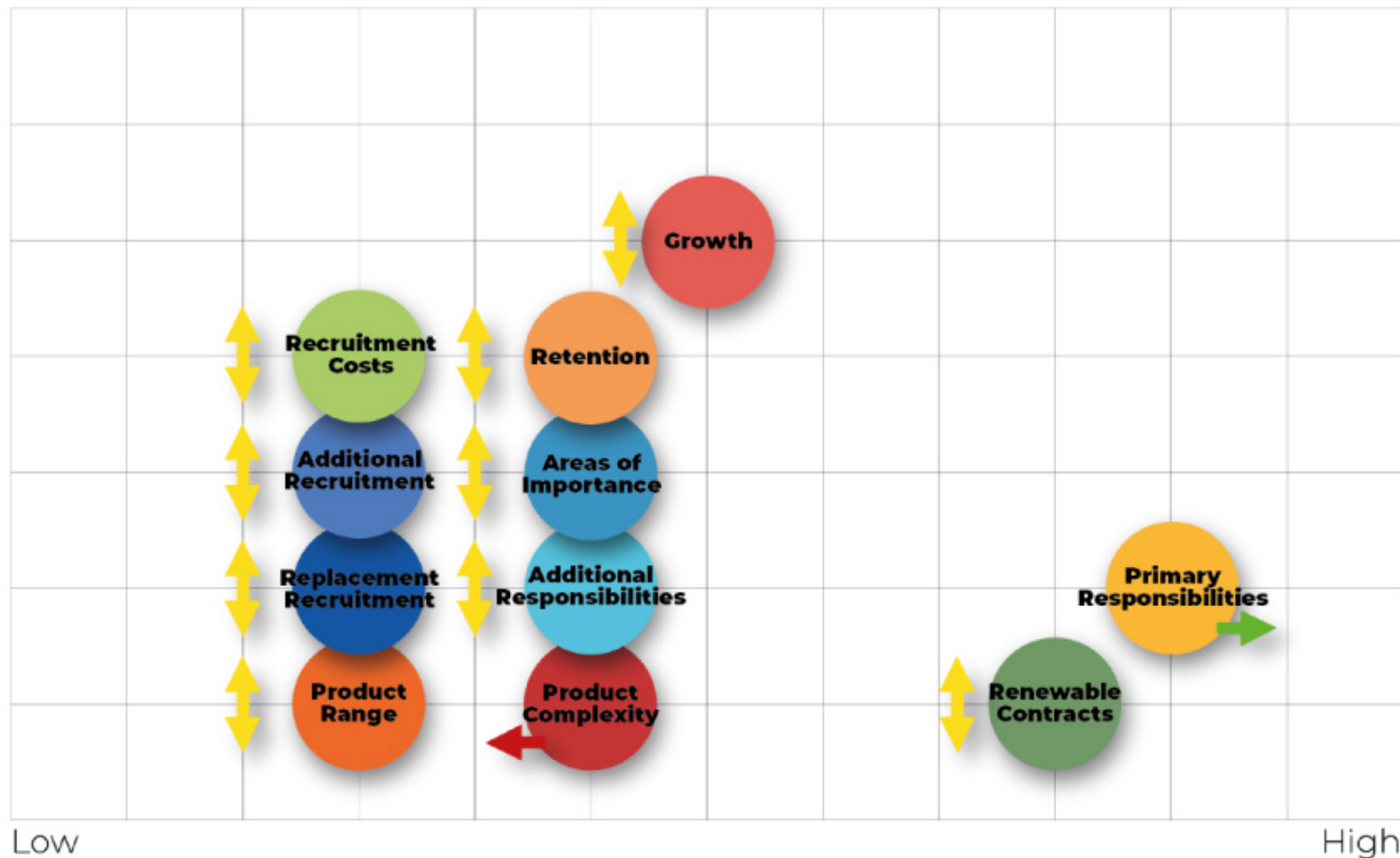
Scope of Needs - $10 - $100 million
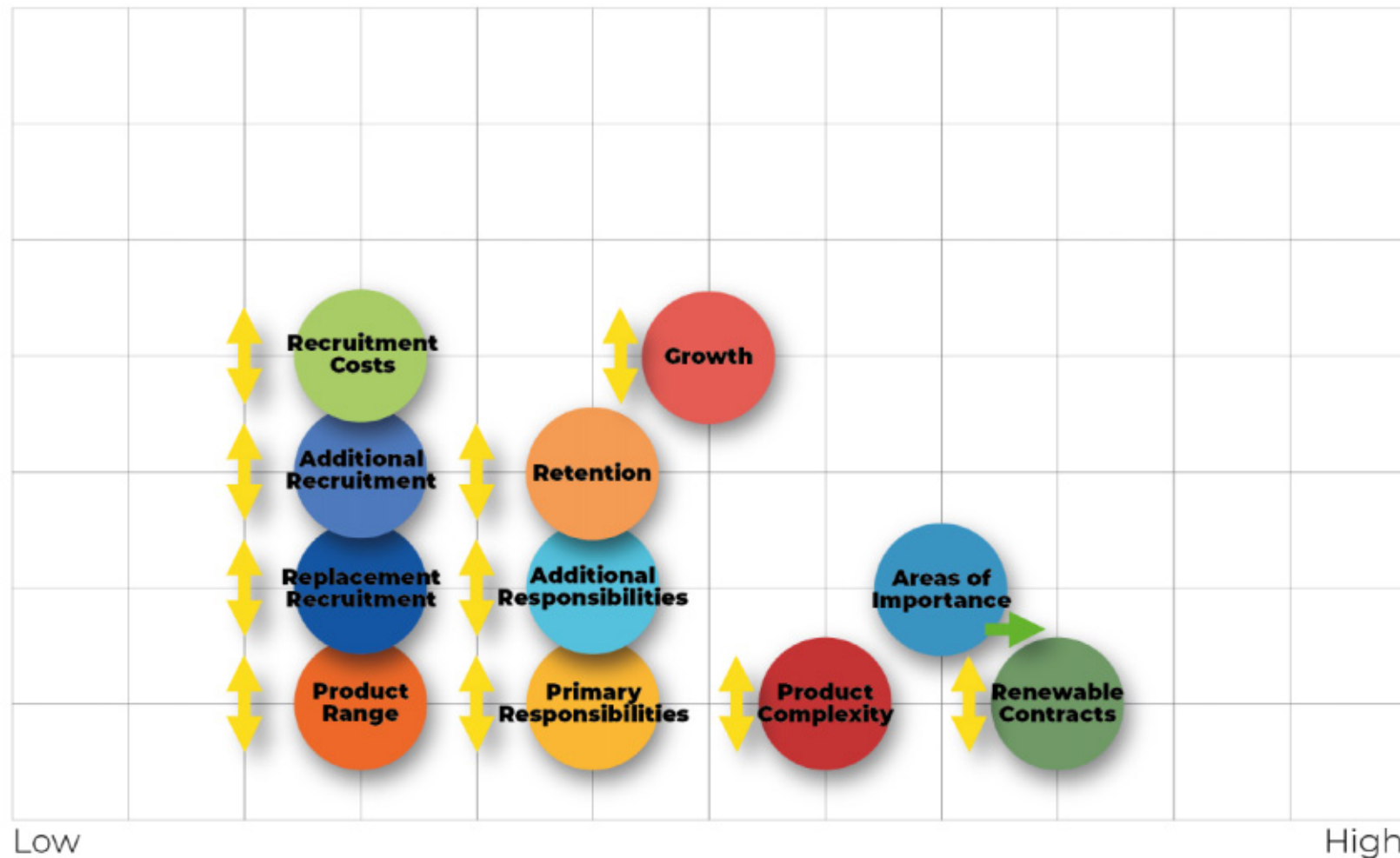
Scope of Needs - over $100 million

Training Activity - under $10 million

Training Activity - $10 - $100 million

Low   High
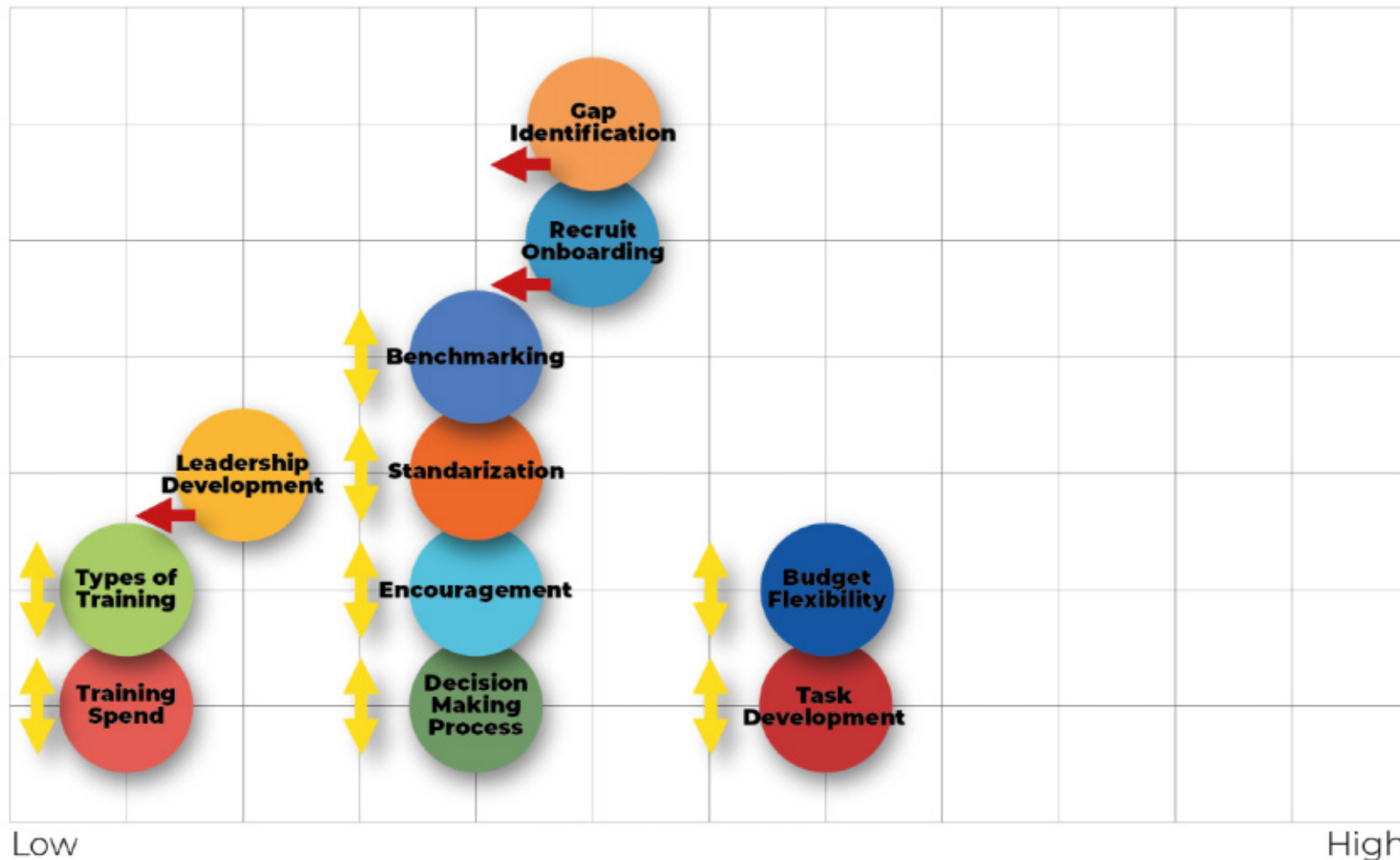
Training Activities - over $100 million

Low

High
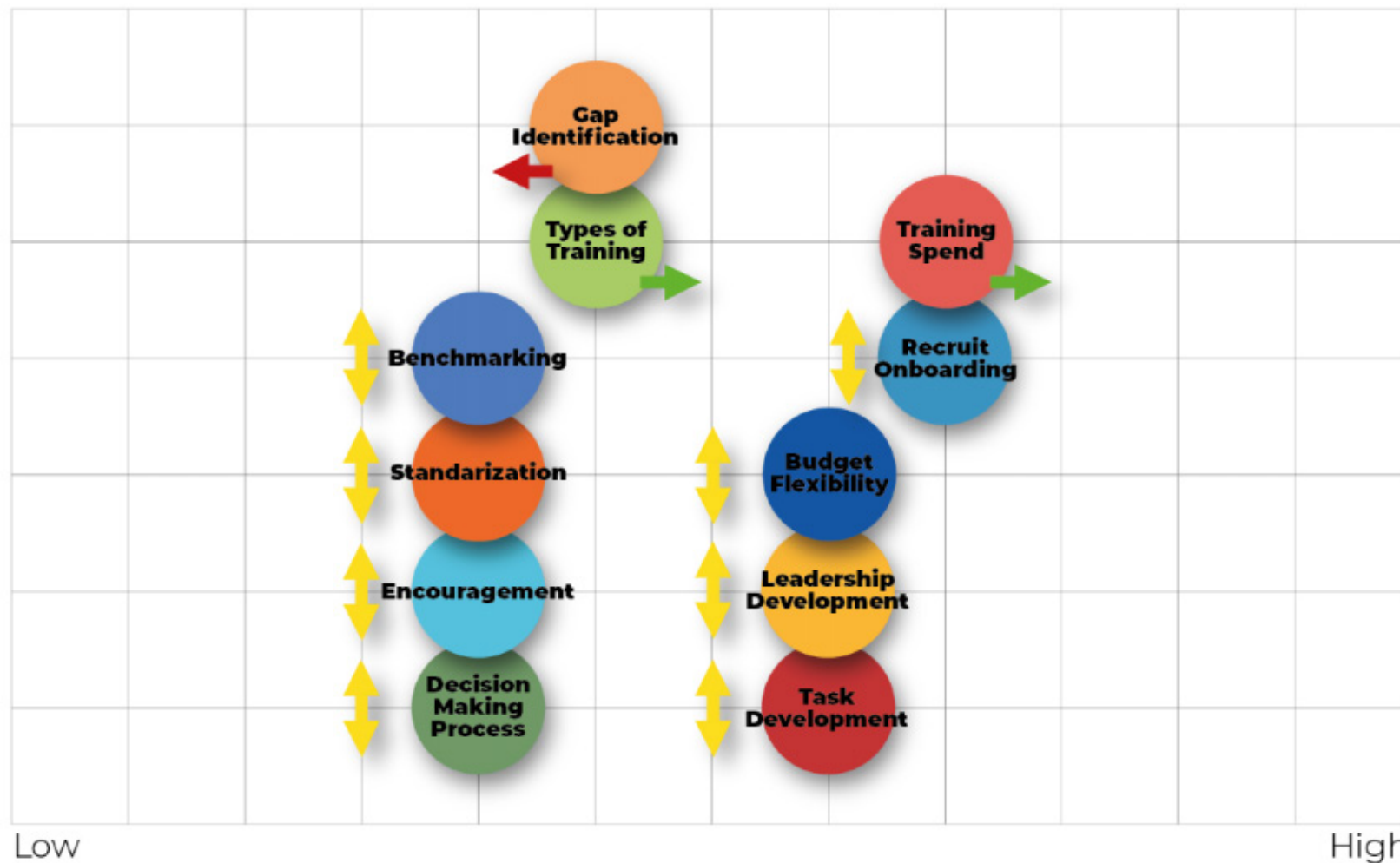
5 Categorization by Type of Ownership

The third categorization was by ownership, because we wanted to know if particular business cultures and/or decision making hierarchies made any difference to the responses provided by CS leaders. Categorization for this was based upon their survey responses to the question "Which of the following best describes your company's ownership?". The options available for selection were again allocated into the following categories, once more enabling the authors to analyze and report on any variations and similarities that we uncovered, but this time based on company type.
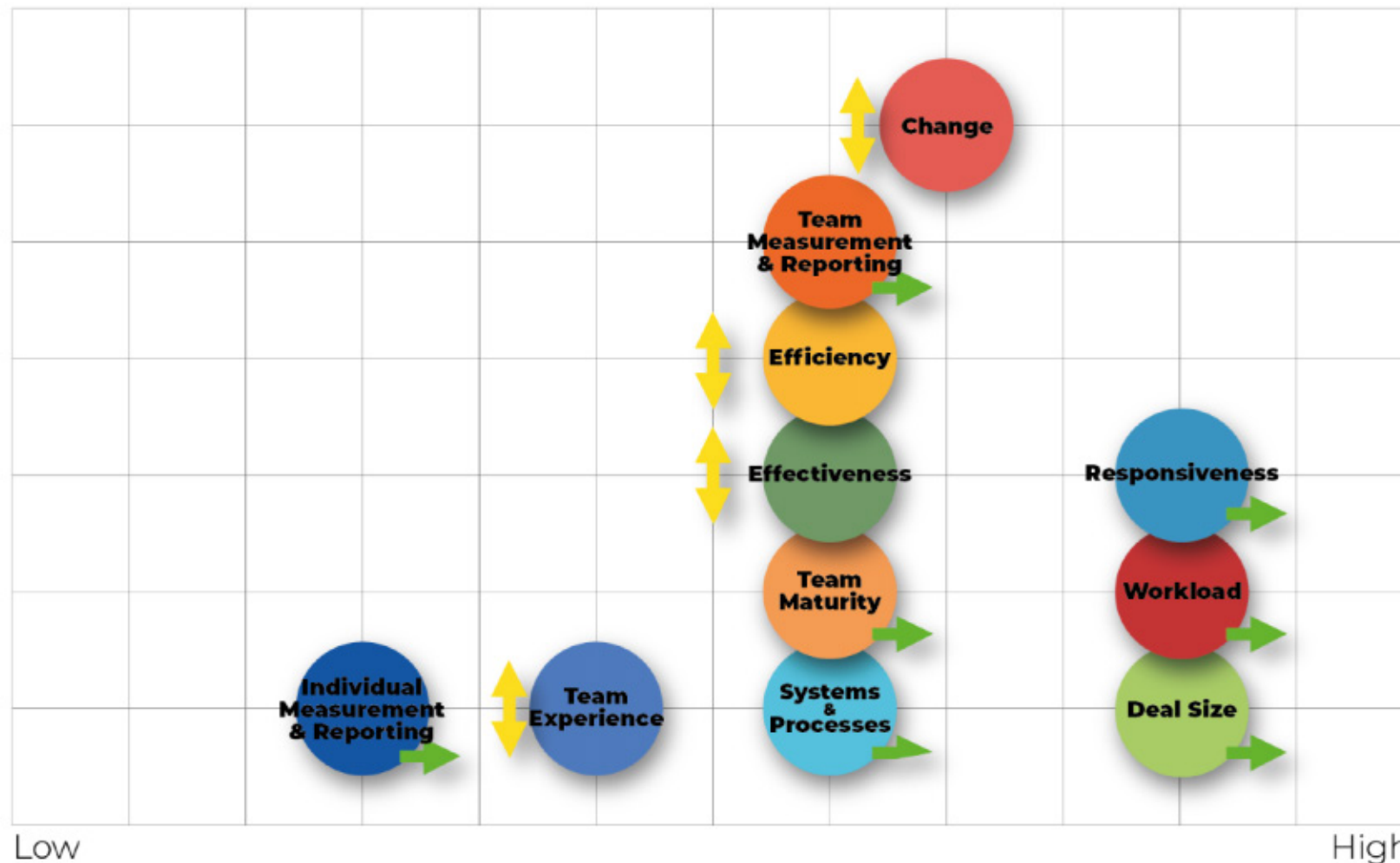
The company ownership categories were:

- **Publically Traded (19% of responses)**
- **Privately Owned (26% of responses)**
- **Privately Owned with Significant VC Investment (51% of responses)**
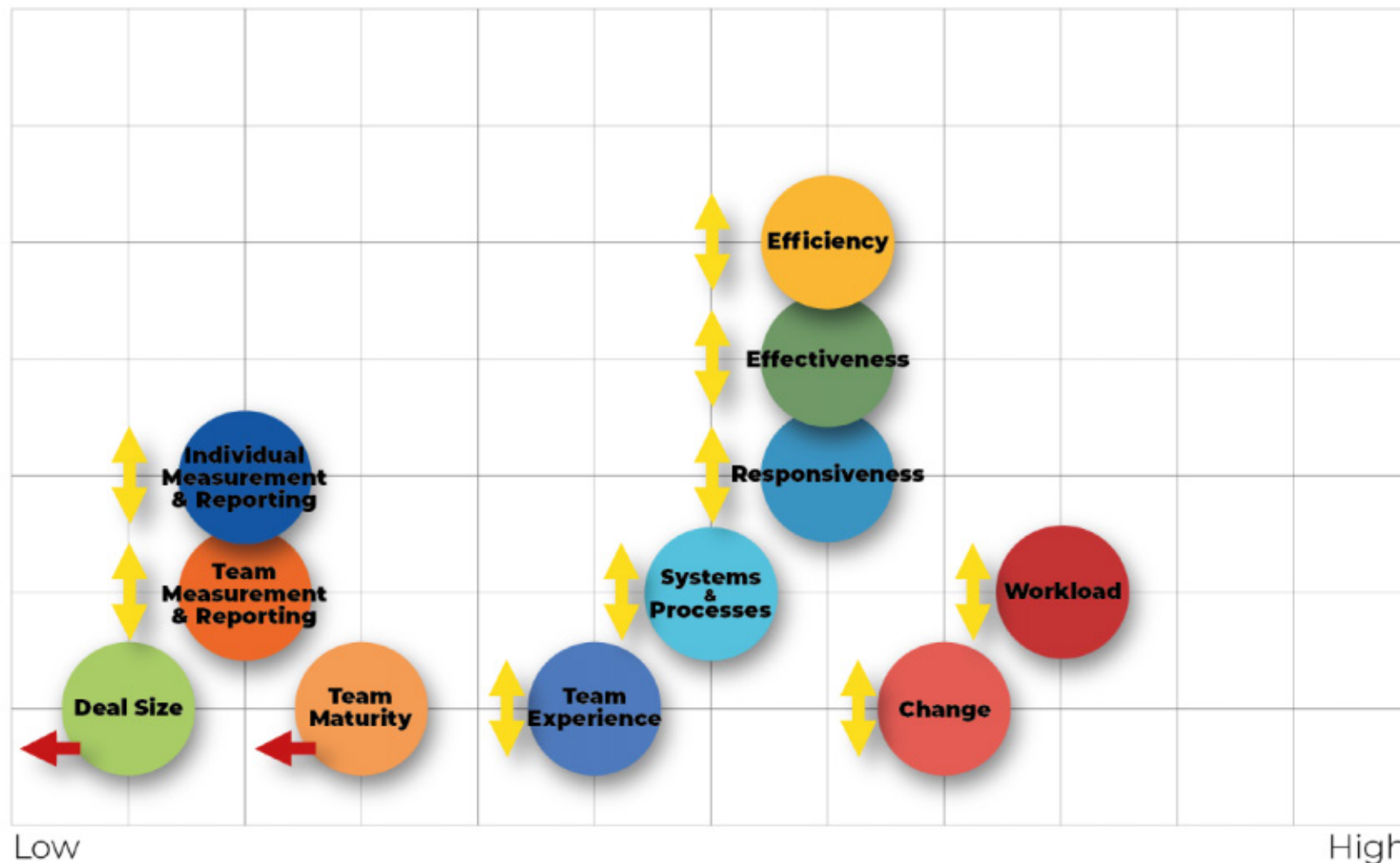- **Other (for example a partnership or a charity) (4% of responses)**
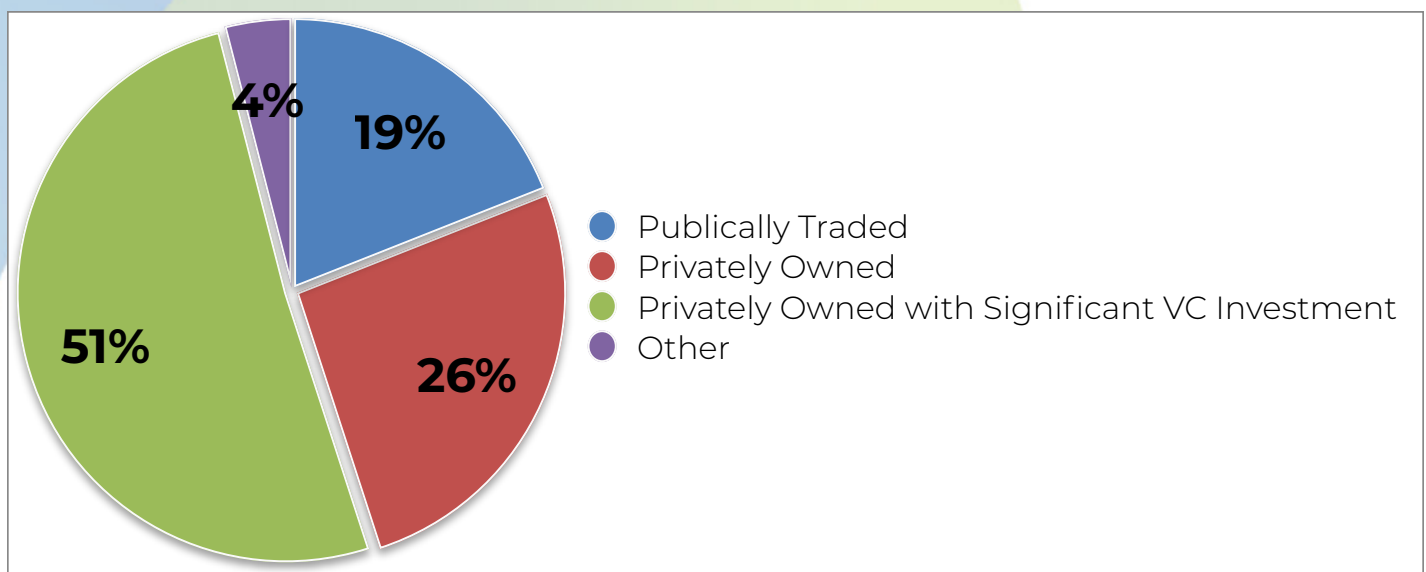
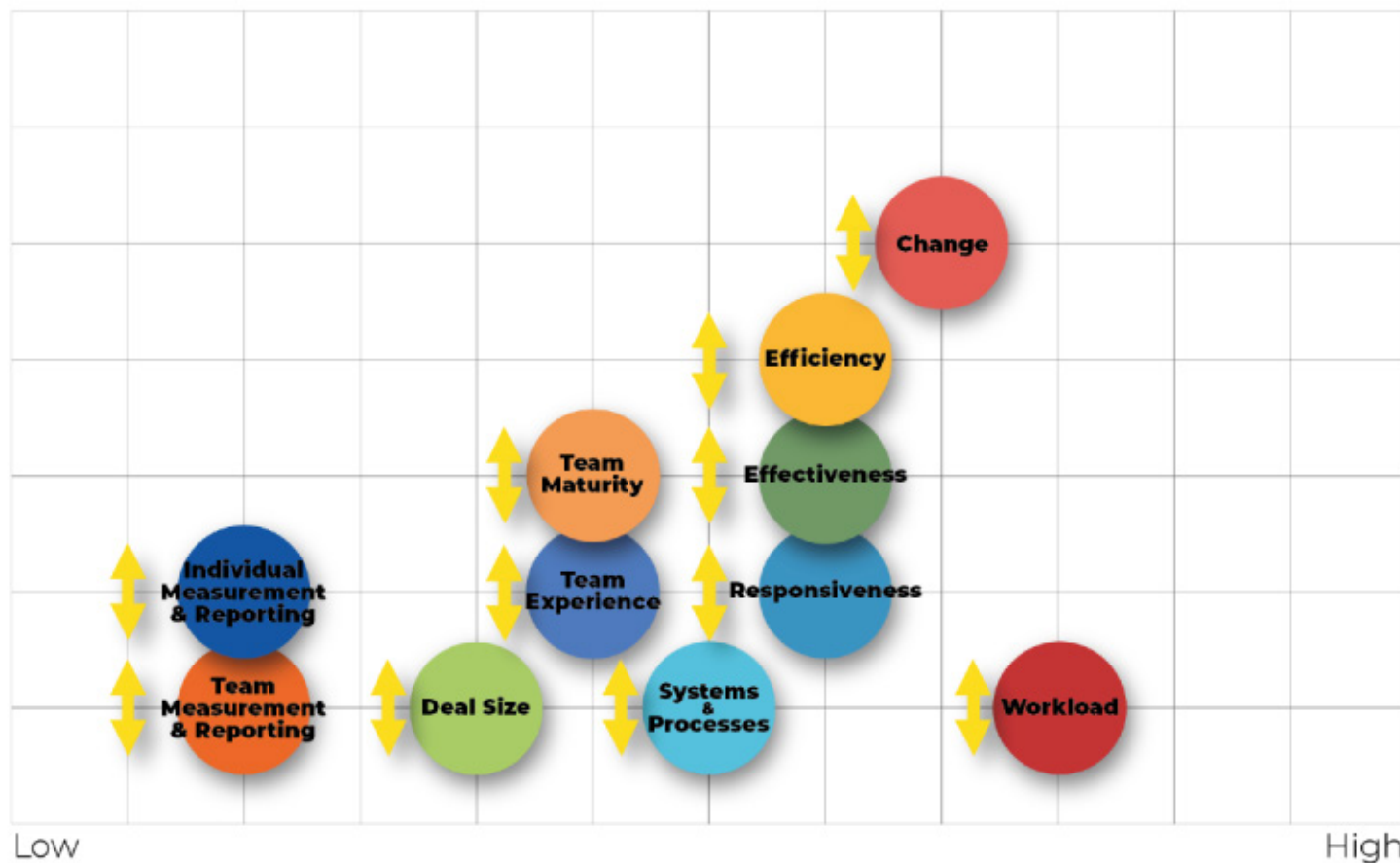# Scope of Capabilities - Publically Traded
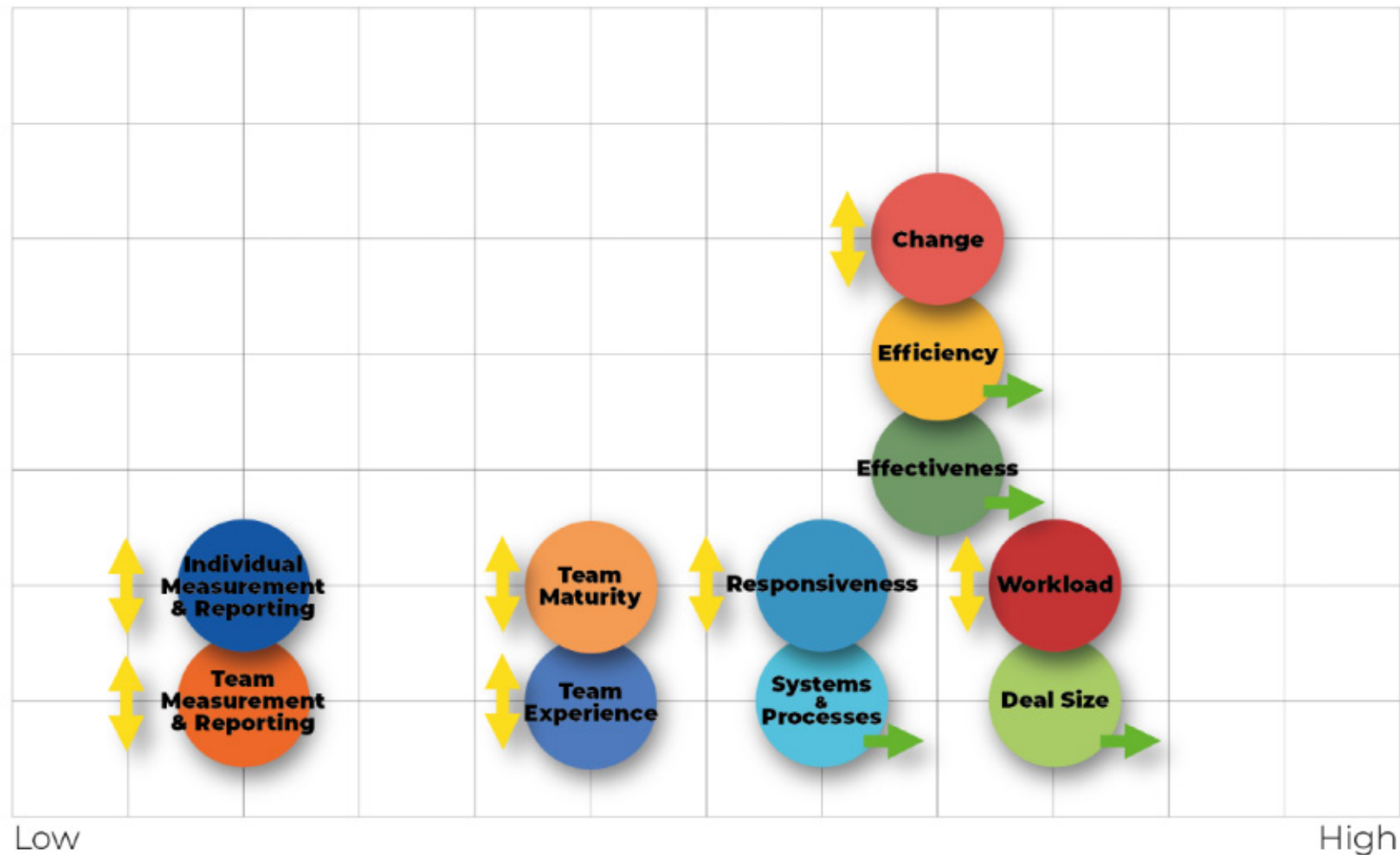
Scope of Capabilities - Privately Owned

Low   High

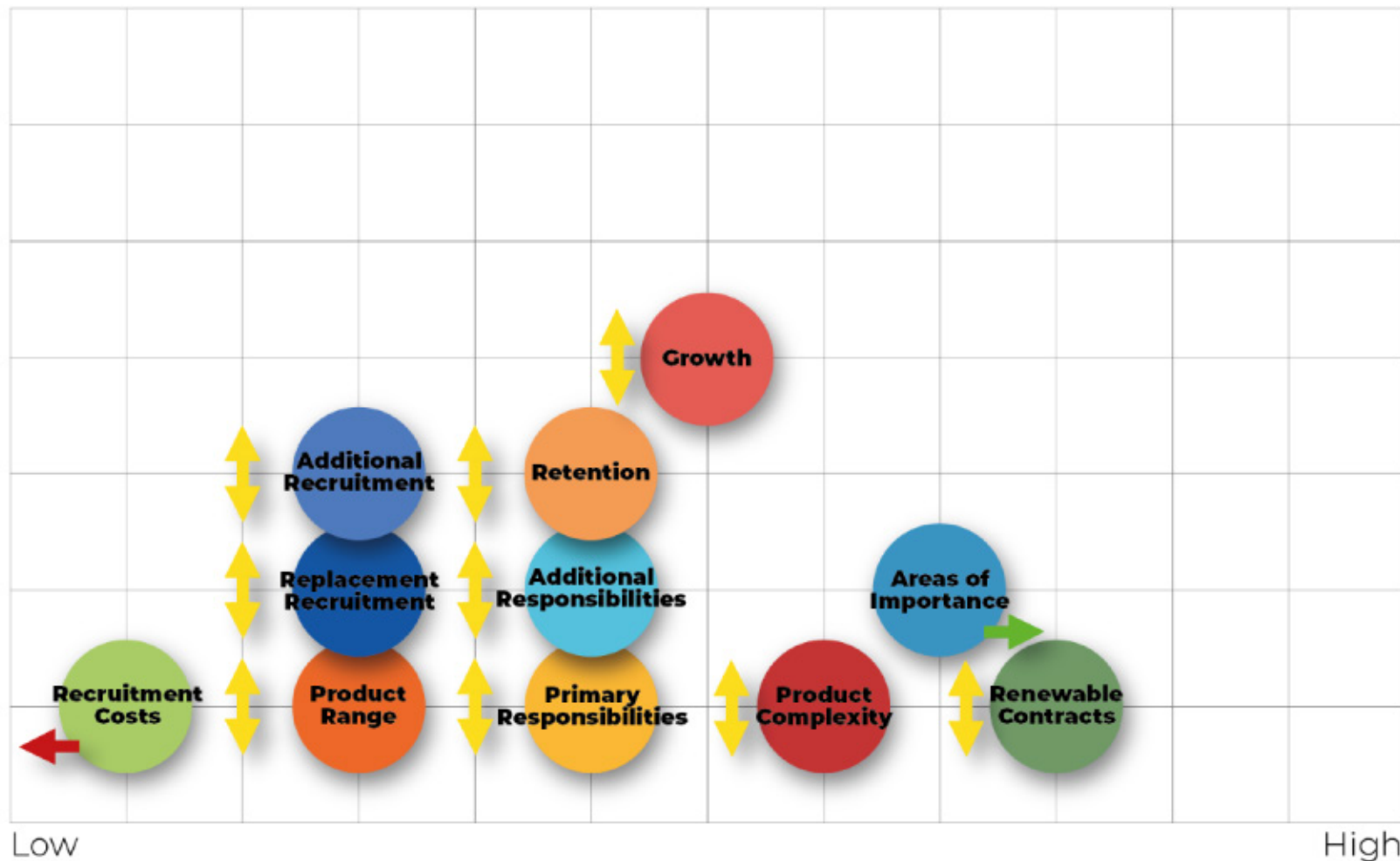# Scope of Capabilities - Privately Owned with Significant VC Investment
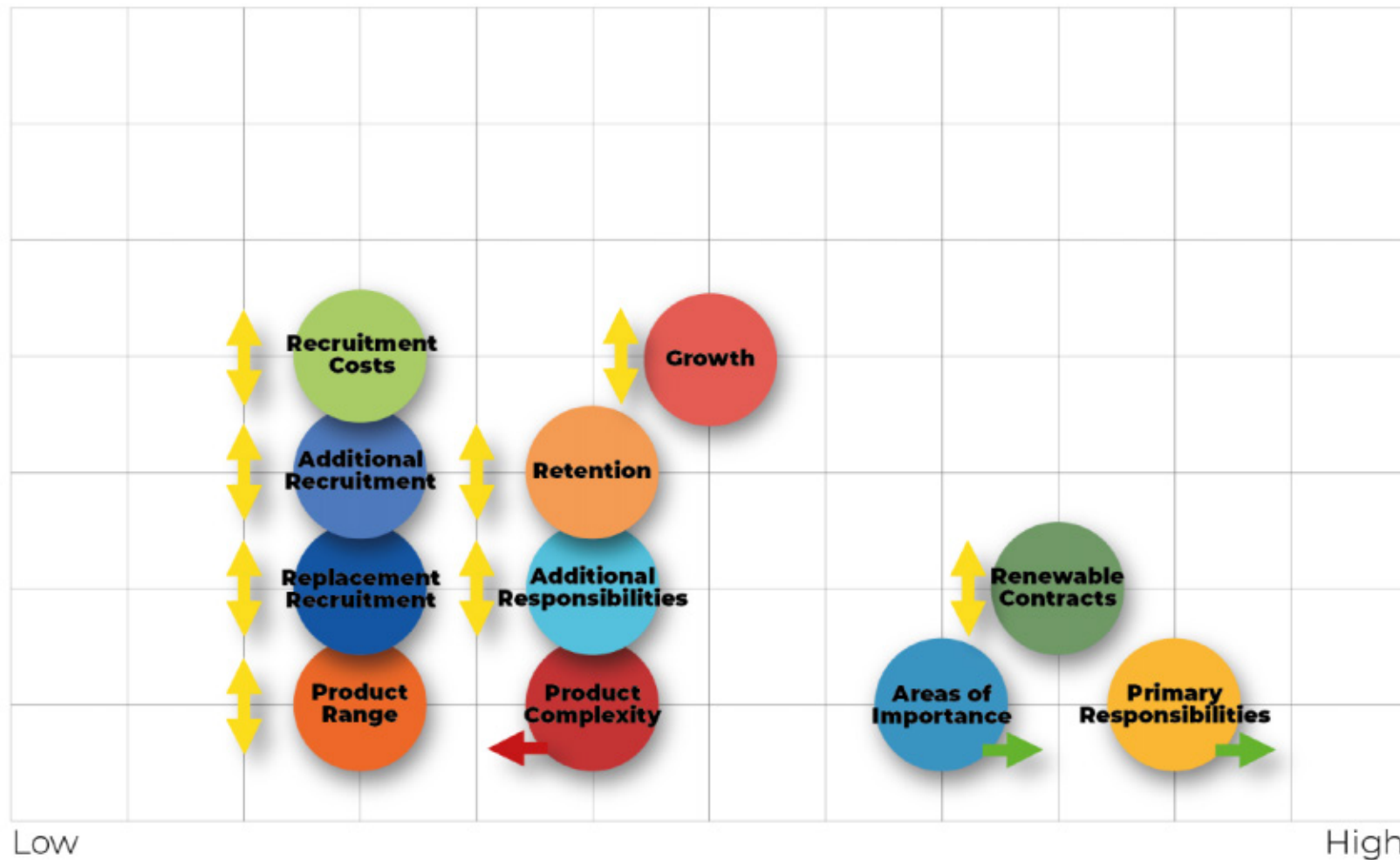
Scope of Capabilities - Other

Scope of Needs - Publically Traded

Low   High

Scope of Needs - Privately Owned

Low

High

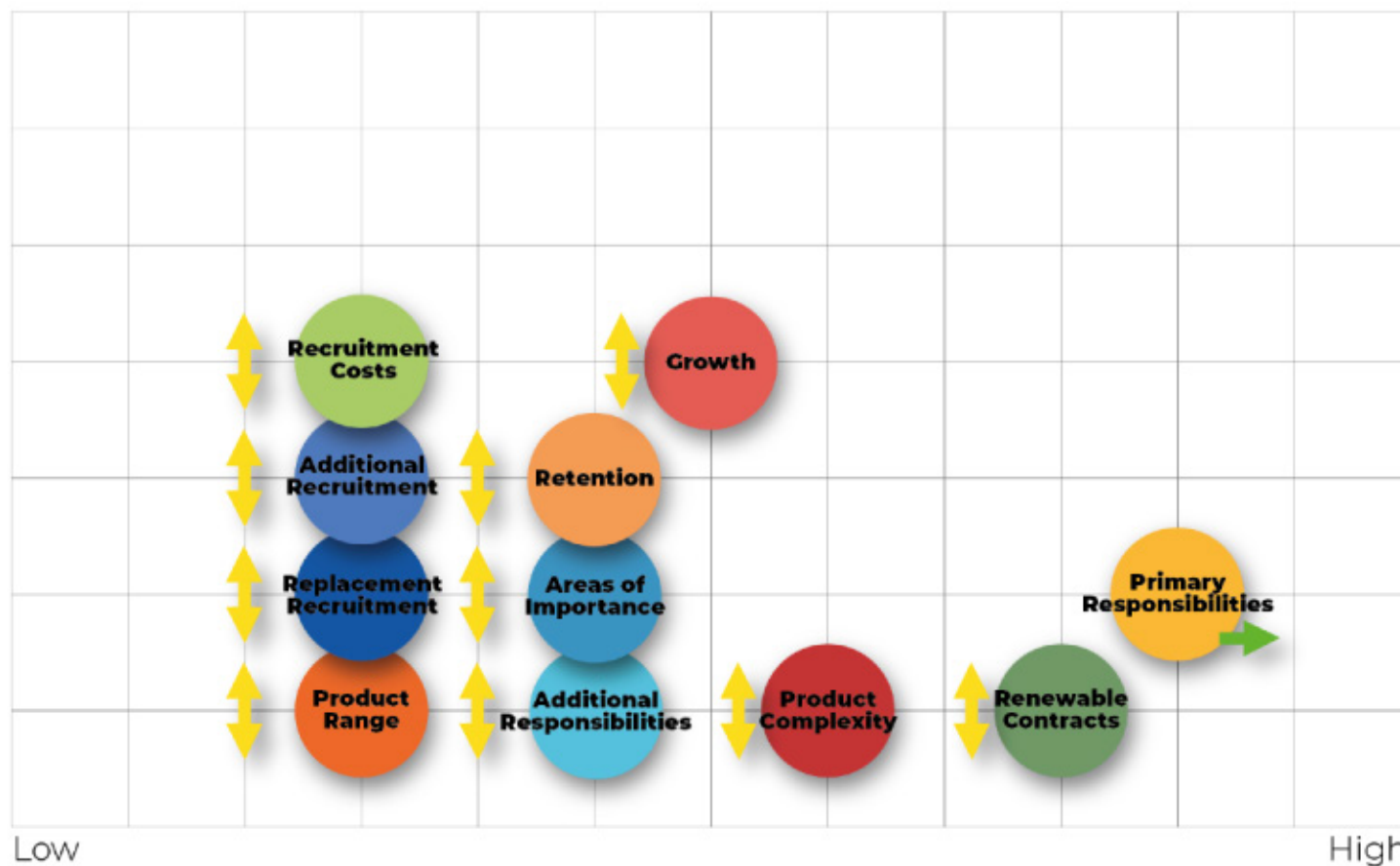# Scope of Needs - Privately Owned with Significant VC Investment

Scope of Needs - Other

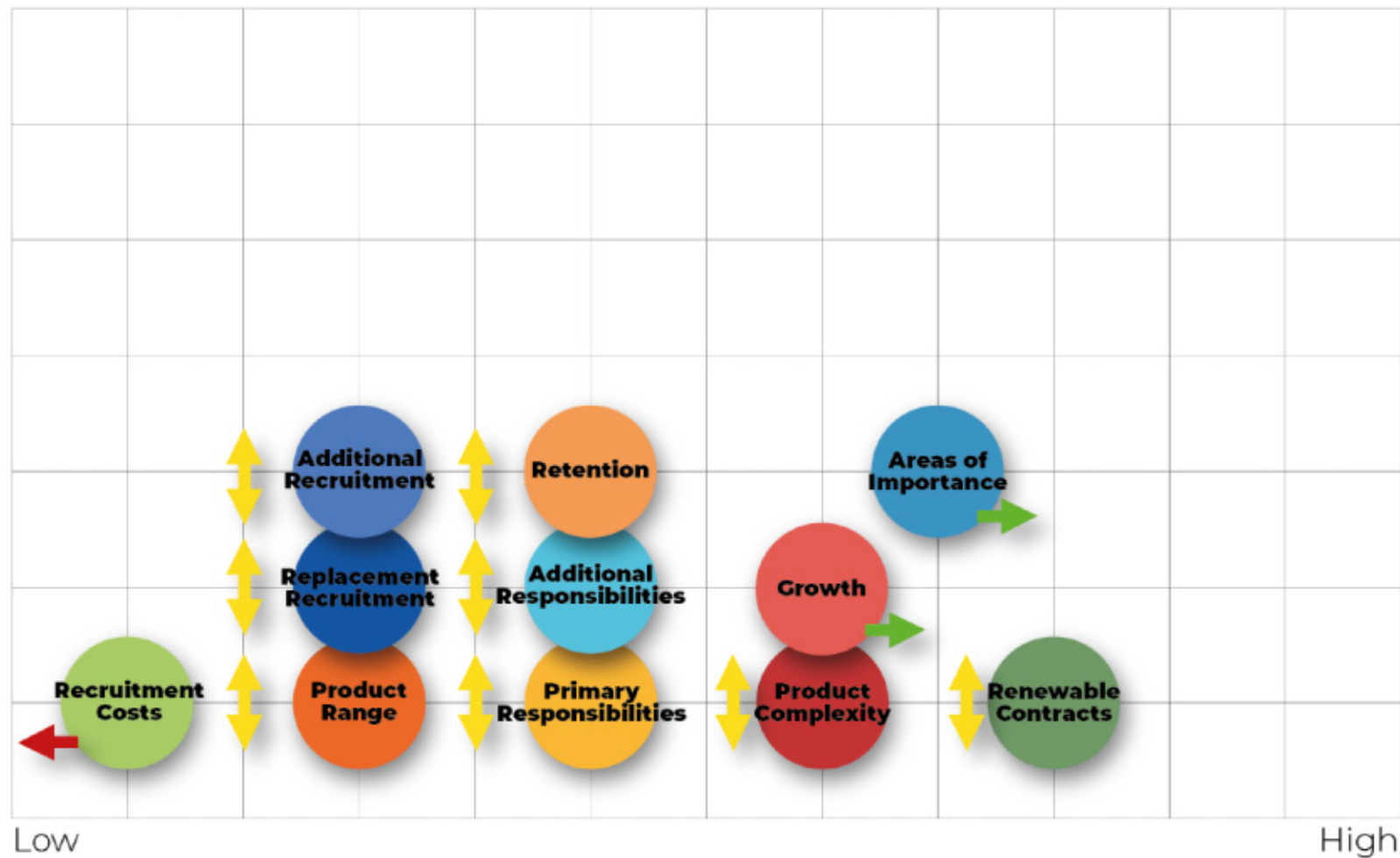Low   High

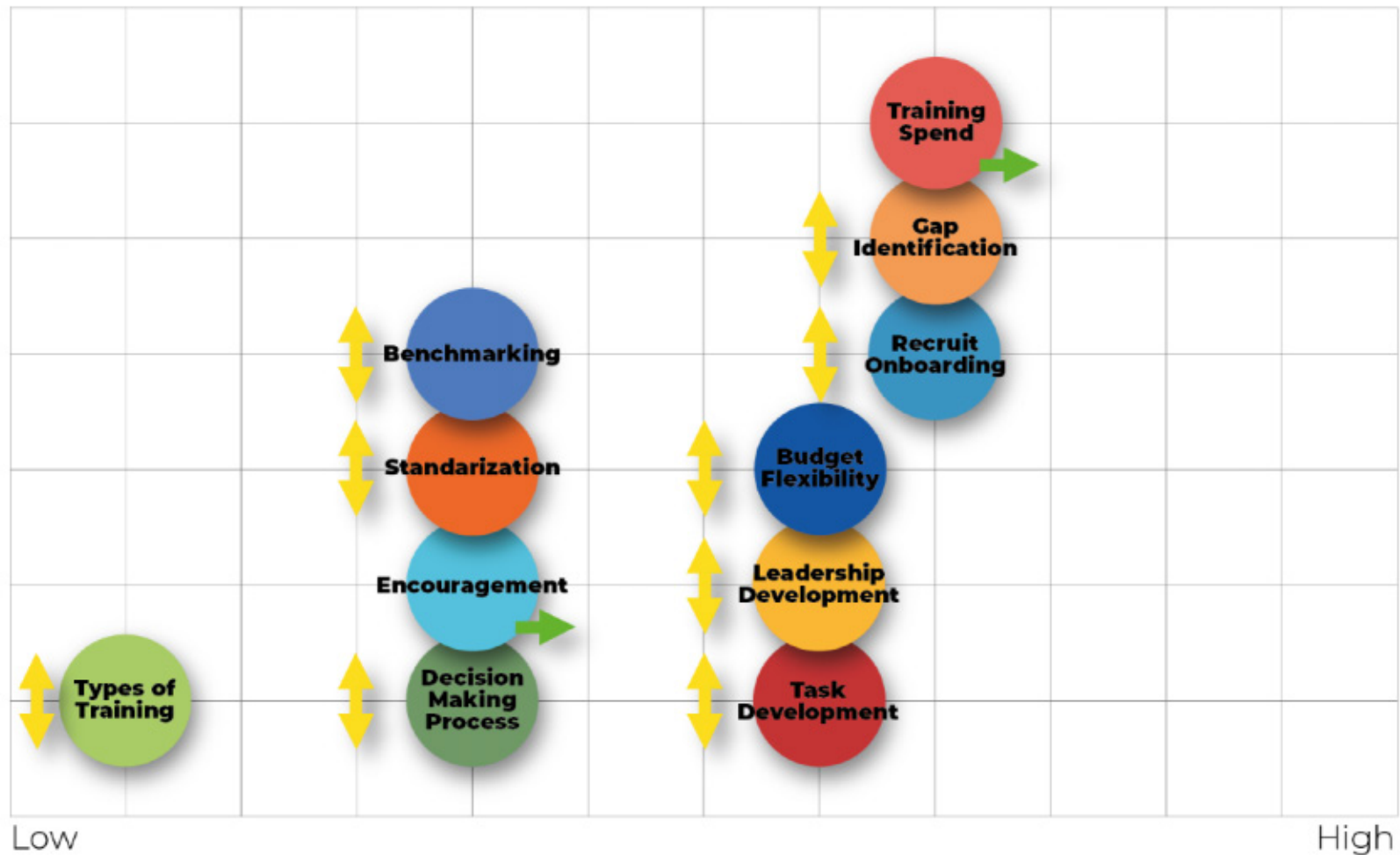# Training Activity - Publically Traded
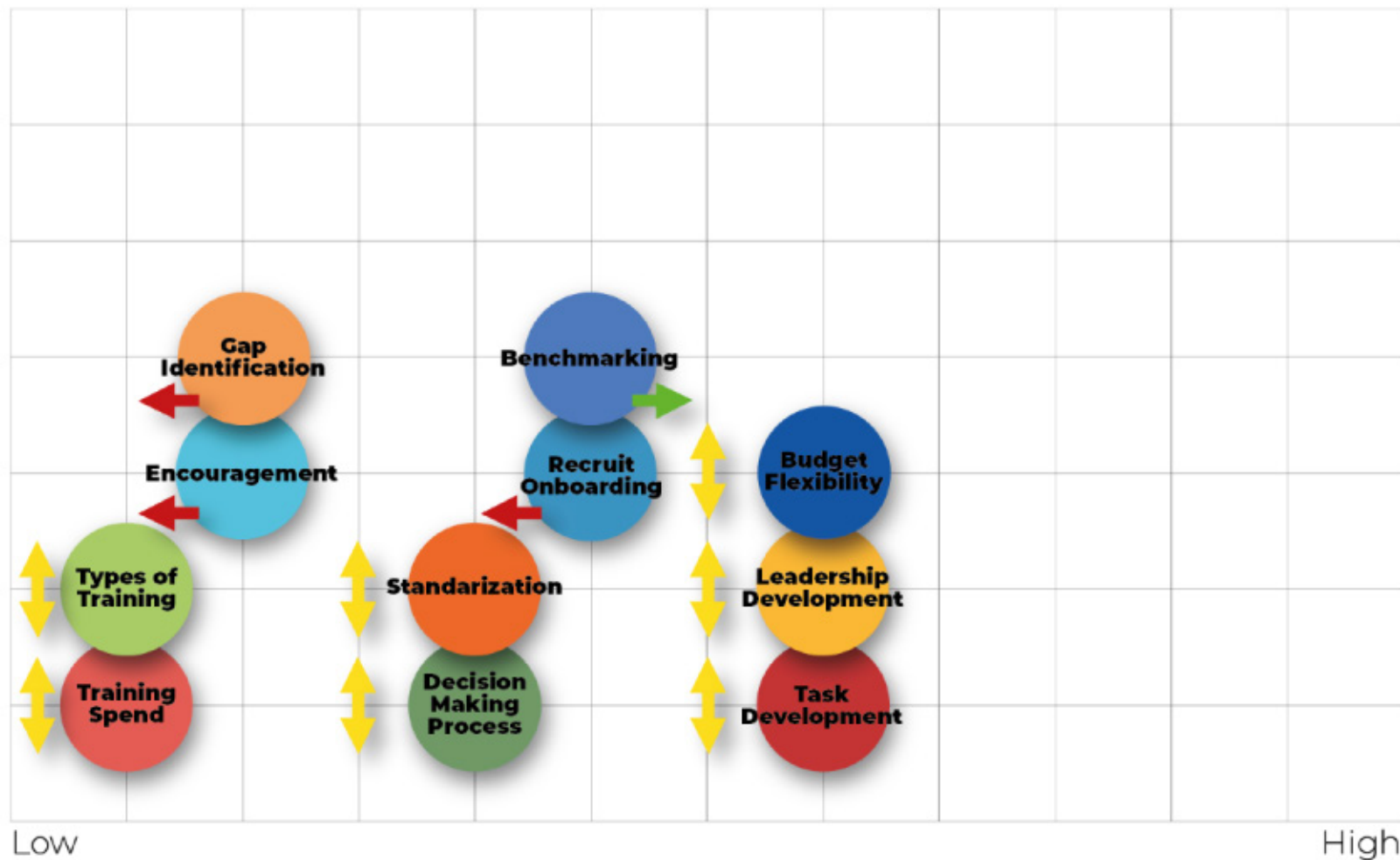

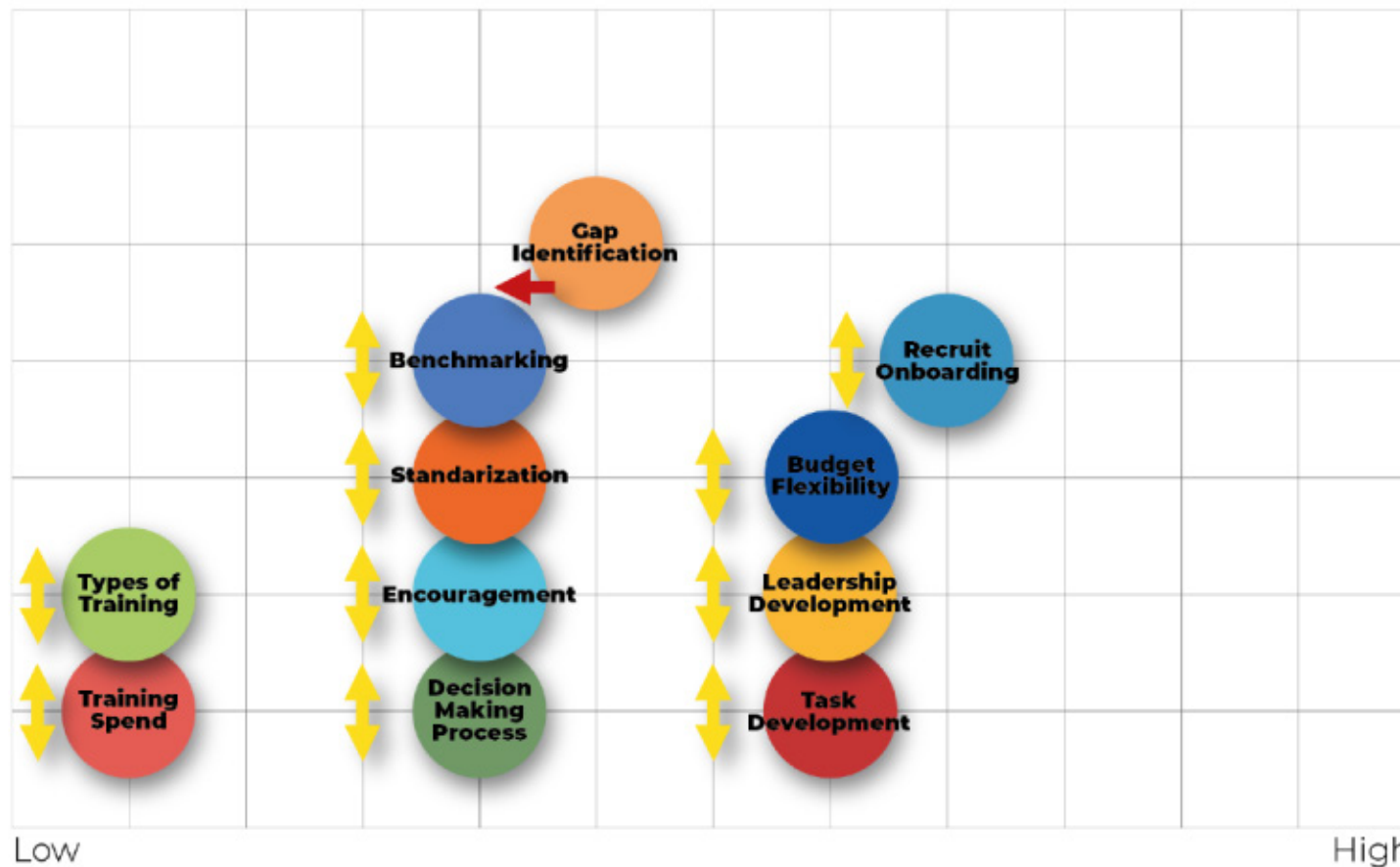Low   High

Training Activity - Privately Owned

Training Activity - Privately Owned with Significant VC Investment

Training Activity - Other
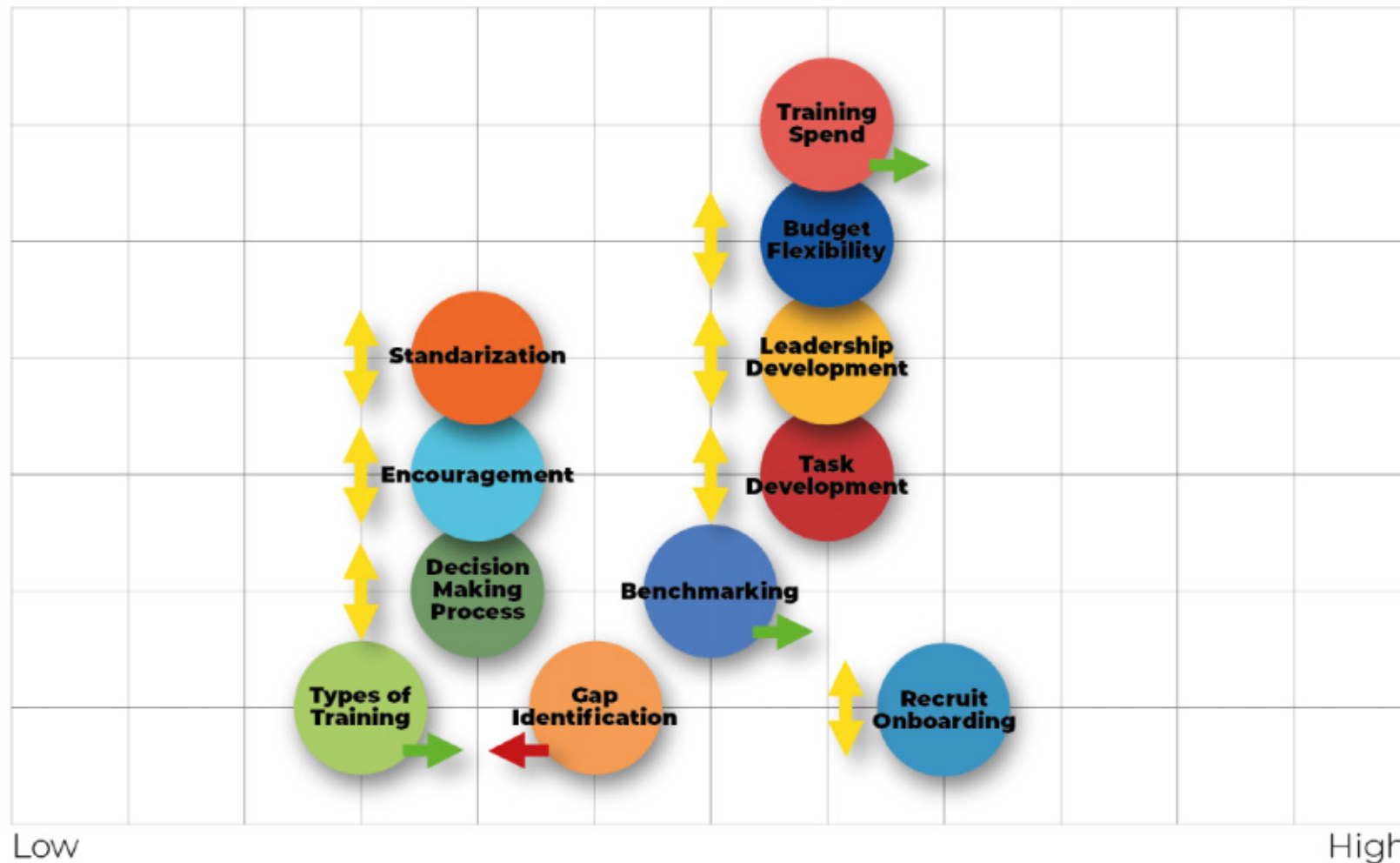
6 Categorization by CS Team Size

The fourth and final categorization was by Customer Success Team size, which we felt was an important consideration for training, certification and CPD options, since smaller teams often needed to be catered for in a different way to larger ones. Categorization for this was based upon their survey responses to the question "How many Customer Success Managers are in your team (dedicated full time or FTE)??". These final options available for selection were once again allocated into the following categories, once more enabling the authors to analyze and report on any variations and similarities that we uncovered, but this time based on company type.

The Customer Success Team size categories were:

- **Under 10 CSMs (full time or FTE) (67% of responses)**

- **From 10 to 40 CSMs (full time or FTE) (21% of responses)**

- **Over 40 CSMs (full time or FTE) (12% of responses)**
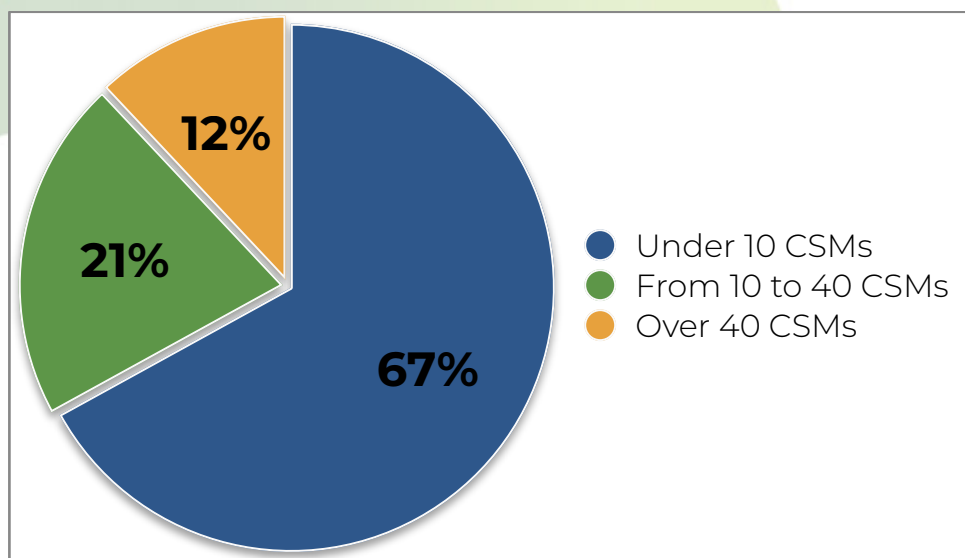
Scope of Capabilities - Under 10 CSMs
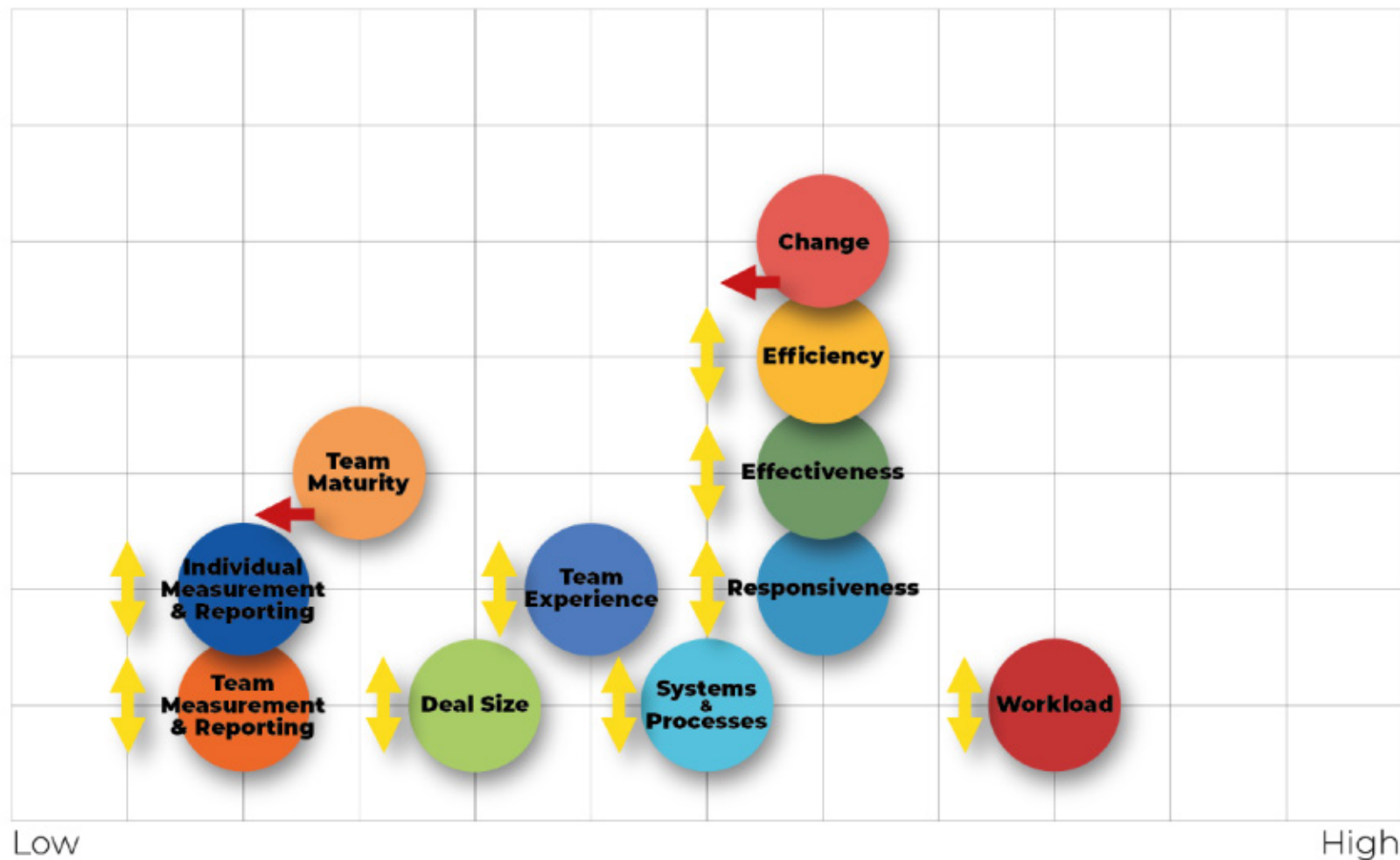
Scope of Capabilities - 10 - 40 CSMs

Low · High
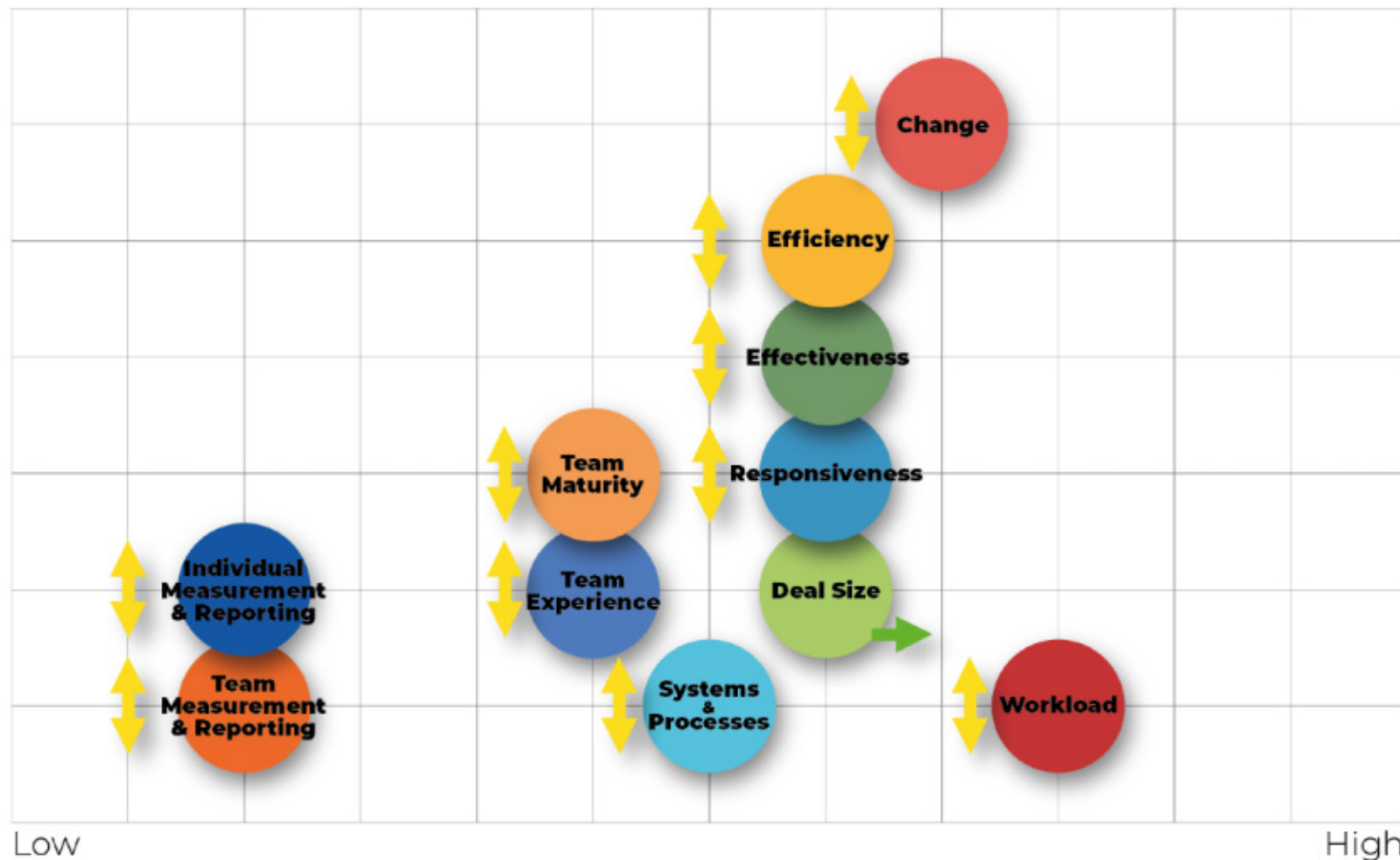
Scope of Capabilities - Over 40 CSMs

Low — High
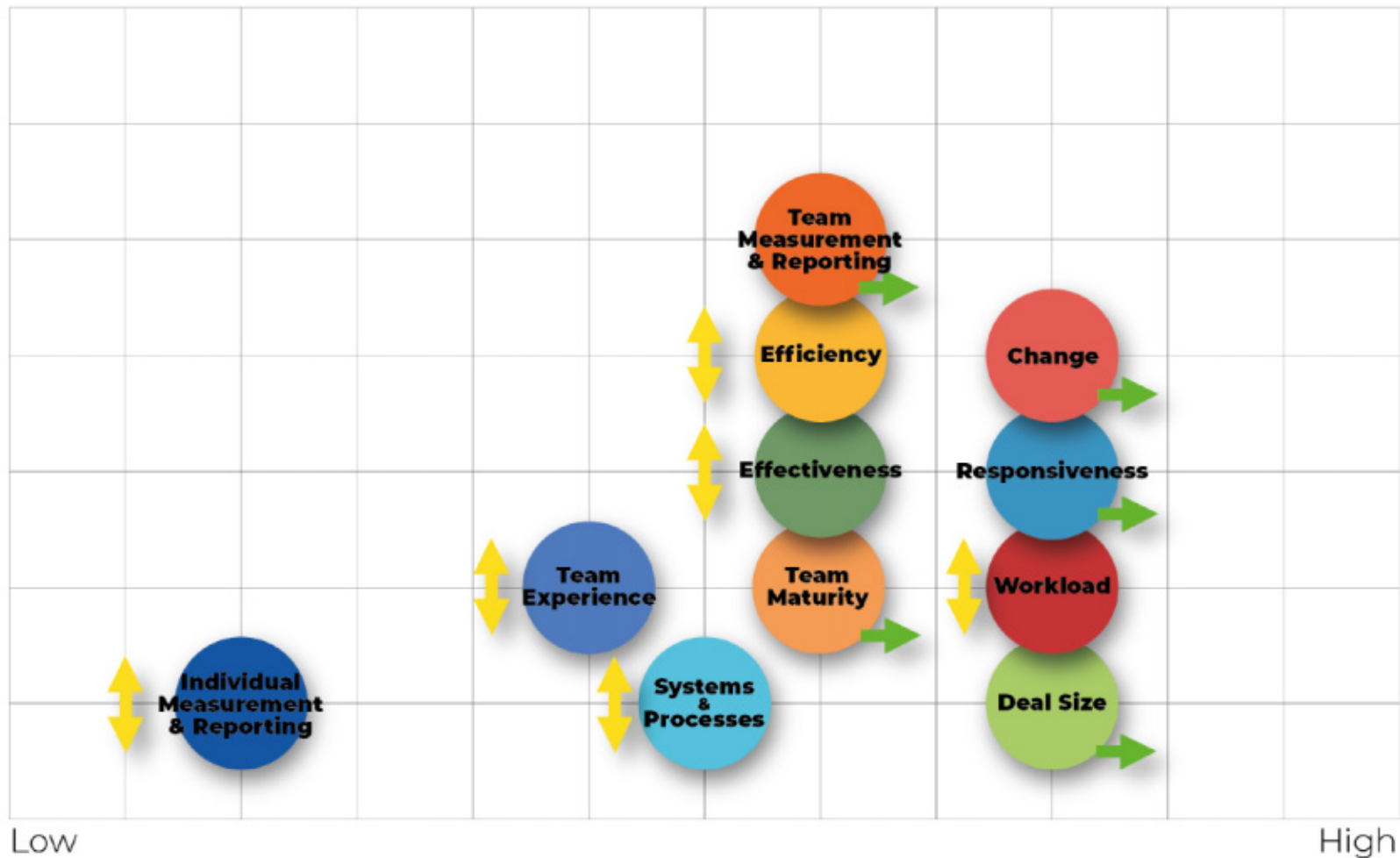
Scope of Needs - Under 10 CSMs
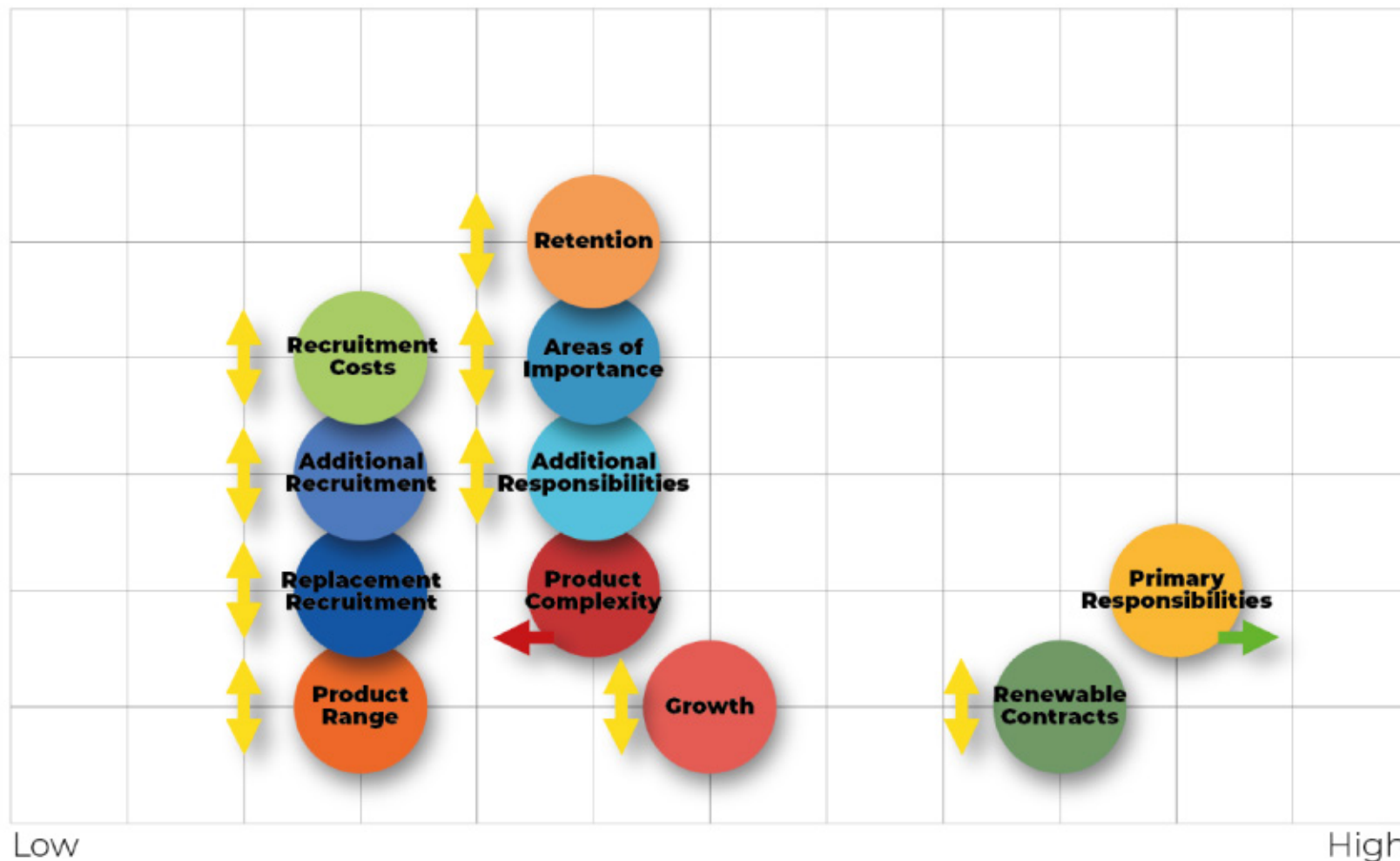
Scope of Needs - 10 - 40 CSMs

Low   High
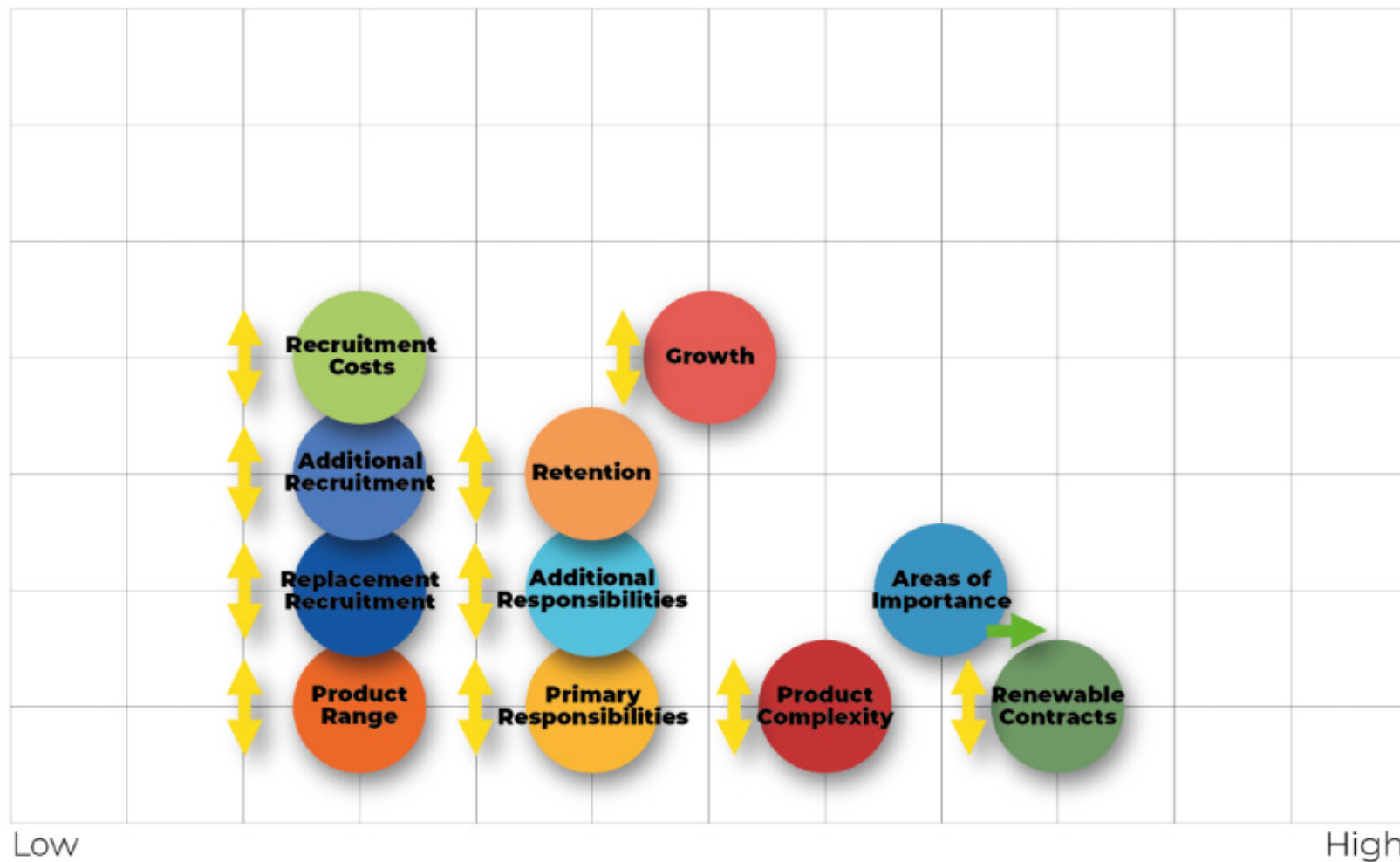
Scope of Needs - Over 40 CSMs

Low   High
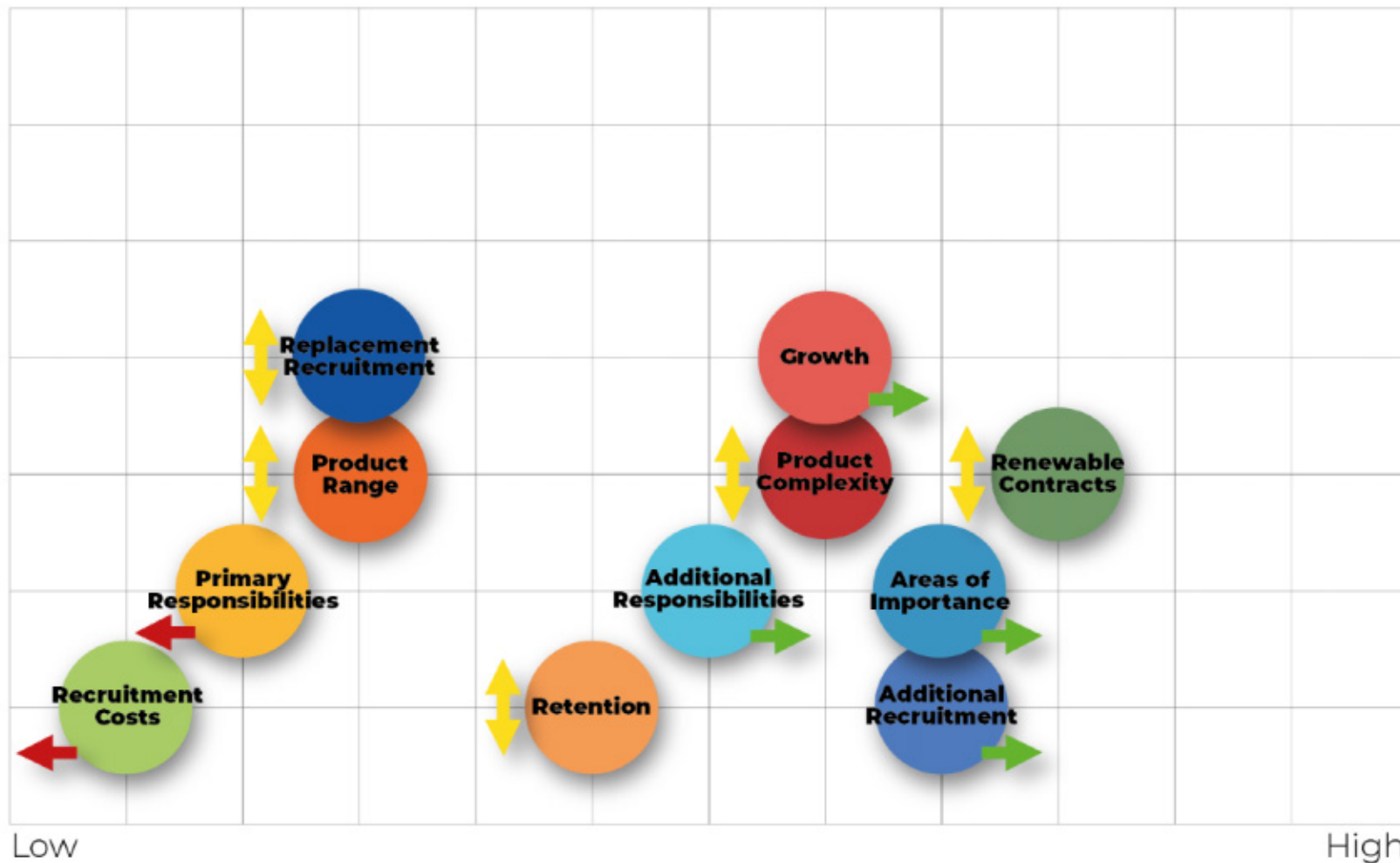
Training Activity - Under 10 CSMs

Low   High
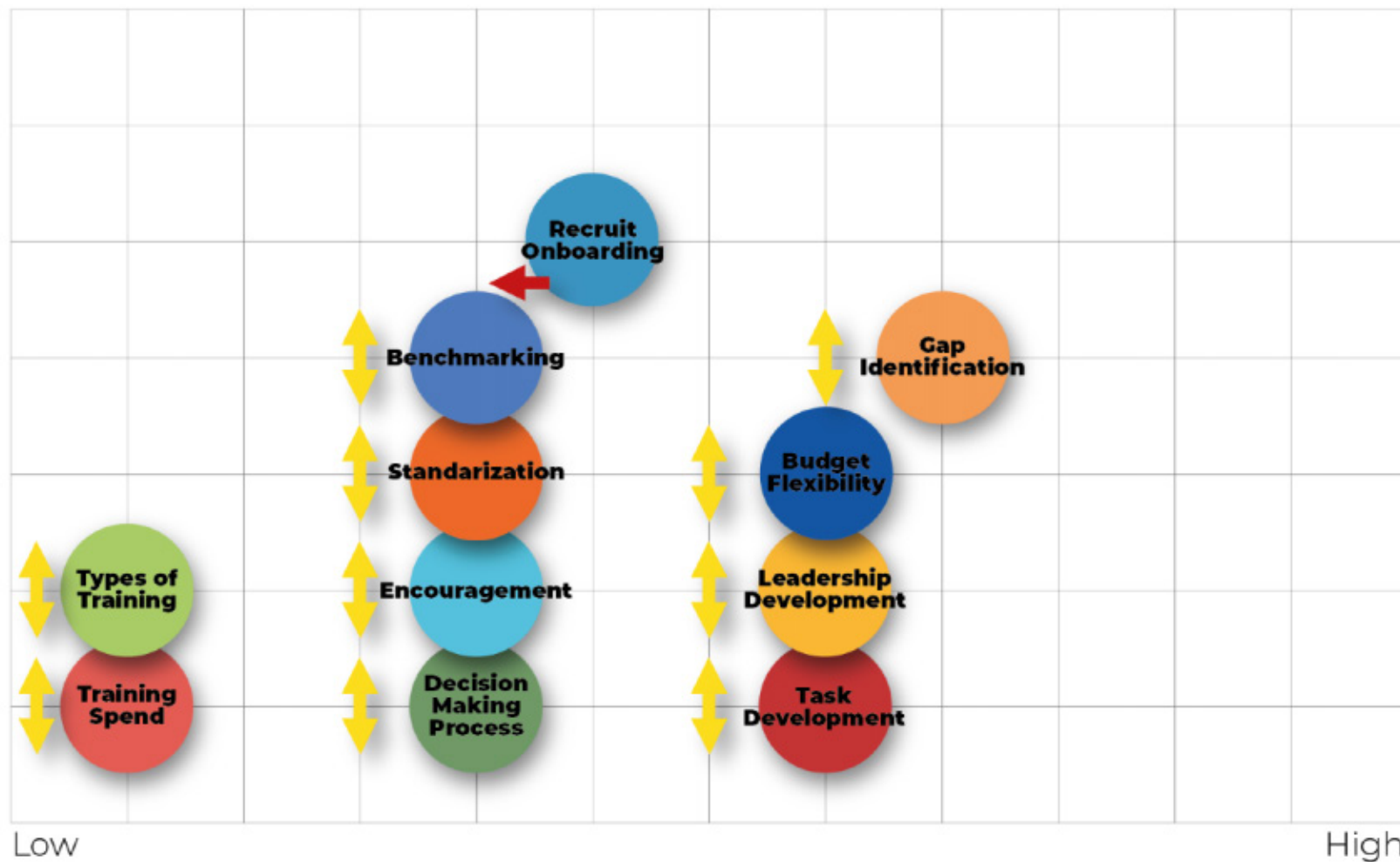
Training Activity - 10 - 40 CSMs
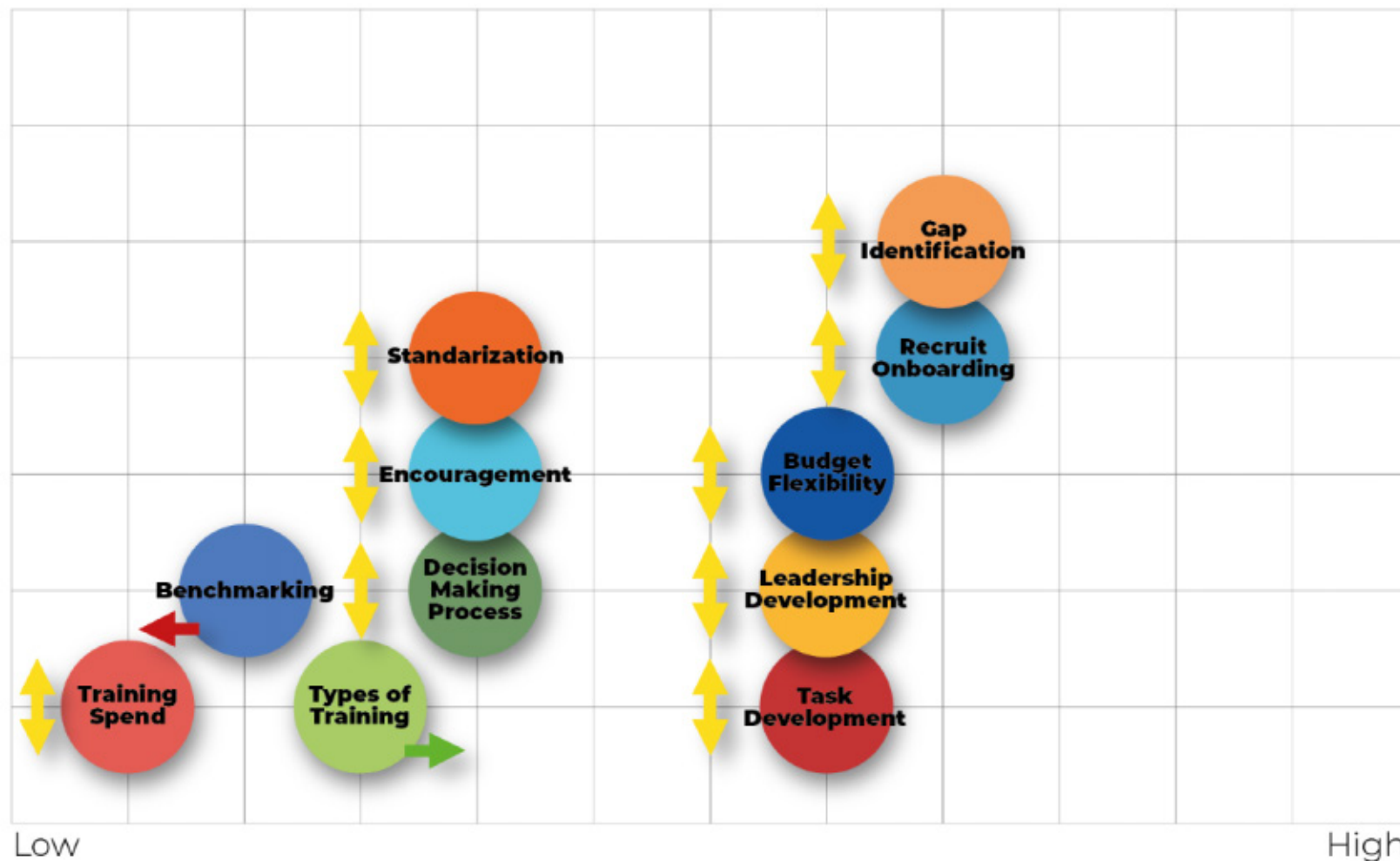
Training Activity - Over 40 CSMs

Low   High

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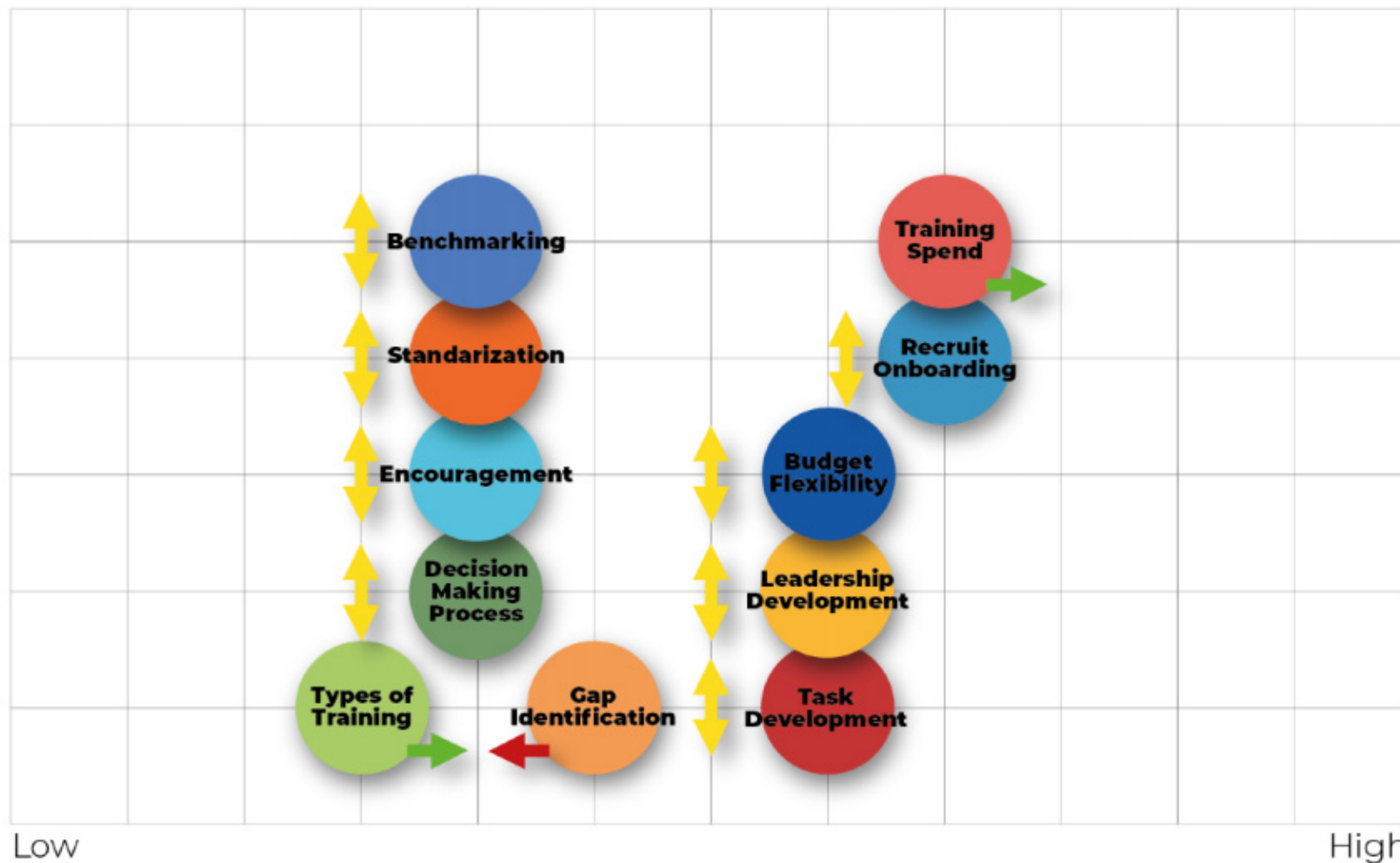
7 Raw Data and Interpreted Response Tables

Overleaf we have reproduced the raw data and interpreted responses both overall and within each category for all 33 questions used within the data analysis and reporting and including data from all 219 respondents.

	Scope of Capability			Q1 - Headquarters			Q2 - Company Size by Revenue			Q3 - Type of Ownership				Q4 - No. of CSMs		
	Description	In Chart	Overall	UK	US	Everywhere Else	Under $10m	$10m to $100m	Over $100m	Public	Private	Private w. Inv	Other	Under 10	10 to 40	40 or more
				36	98	70	89	57	58	37	51	103	8	136	43	24
1	What is the typical value of an average purchase?	Deal Size	4	4	9	1	4	7	8	10	1	4	9	4	8	9
2	What is the level of Customer Success Management experience of your team?	Team Experience	5	7	5	5	5	5	5	5	5	5	5	5	5	5
3	How would you describe the level of maturity of your Customer Success function as a whole?	Team Maturity	5	5	5	3	3	5	5	7	3	5	5	3	5	7

#	Question	Category															
4	How busy is your team overall?	Workload	9	9	9		9	9	9	9	9	9	9	9	9	9	9
5	How effective is your team overall?	Effectiveness	7	7	7		7	7	7	8	7	7	7	8	7	8	7
6	How efficient is your team overall?	Efficiency	7	7	7		7	7	7	7	7	7	7	8	7	7	7
7	How rapidly is your team needing to adapt to meet changing needs?	Change	8	7	8		8	7	8	8	8	8	8	8	7	8	8
8	How mature is the support for your team in terms of systems, processes, tools, frameworks, playbooks, etc?	Systems & Processes	6	6	6		6	6	6	7	7	6	6	7	6	6	6
9	How important to you is the ability to identify and respond to your team members' knowledge and skill gaps?	Responsiveness	7	7	7		7	7	7	7	9	7	7	7	7	7	9
10	How do you measure and report on training activities?	Team Measurement & Reporting	2	2	2		2	2	2	7	7	2	2	2	2	2	7
11	How do you currently measure and report on team member training?	Individual Measurement & Reporting	2	2	2		2	2	2	3	3	2	2	2	2	2	2

Scope of Needs				Q1 - Headquarters			Q2 - Company Size by Revenue			Q3 - Type of Ownership				Q4 - No. of CSMs		
	Description	In Chart	Overall	UK	US	Everywhere Else	Under $10m	$10m to $100m	Over $100m	Public	Private	Private w. Inv	Other	Under 10	10 to 40	40 or more
1	Which of the following best describes what your company sells?	Product Range	3	3	3	3	3	3	3	3	3	3	3	3	3	3
2	What percentage of an average purchase is typically for renewable services?	Renewable Contracts	9	9	9	9	9	9	9	9	9	9	9	9	9	9
3	How complex or difficult to implement or drive value from is the typical solution you sell?	Product Complexity	7	7	7	5	5	7	7	7	5	7	5	5	7	7
4	Which of the following activities is your team PRIMARILY responsible for?	Primary Responsibilities	5	2	5	7	10	5	5	5	10	10	7	10	5	2
5	Which of the following activities is your team involved in but NOT PRIMARILY responsible for?	Additional Responsibilities	5	5	5	5	5	5	5	5	5	5	5	5	5	6
6	How fast is your team growing in terms of size?	Growth	6	6	6	6	6	6	7	7	6	6	7	6	6	8
7	Rate the relative importance of these core subject areas for your team	Areas of Importance	5	8	8	5	5	8	8	8	8	5	8	5	8	5
8	How many replacement team members do you estimate you will need to recruit for over the next 12 months?	Replacement Recruitment	3	3	3	3	3	3	3	3	3	3	3	3	3	3

#	Description	In Chart	Overall	UK	US	Everywhere Else	Under $10m	$10m to $100m	Over $100m	Public	Private	Private w. Inv	Other	Under 10	10 to 40	40 or more
9	How many additional team members do you estimate you will need to recruit for over the next 12 months?	Additional Recruitment	3	3	3	3	3	3	3	3	3	3	3	3	3	8
10	How long on average do you retain your Customer Success Manager team members for?	Retention	5	5	5	5	5	5	5	5	5	5	5	5	5	5
11	How much on average does it cost to recruit a new team member?	Recruitment Costs	3	3	1	3	3	3	1	1	3	3	1	3	3	1

Training Activity

#	Description	In Chart	Overall	Q1 - Headquarters			Q2 - Company Size by Revenue			Q3 - Type of Ownership				Q4 - No. of CSMs		
				UK	US	Everywhere Else	Under $10m	$10m to $100m	Over $100m	Public	Private	Private w. Inv	Other	Under 10	10 to 40	40 or more
1	Which of the following best describes your Customer Success team's new recruit onboarding process?	Recruit Onboarding	8	8	8	5	5	5	8	8	5	8	8	5	8	8
2	How much do you spend on training (per team member, per annum) in US$?	Training Spend	1	1	1	1	1	1	8	8	1	1	7	1	1	8
3	Which of the following types of training have you provided your team with in the last 12 months?	Types of Training	1	1	2	1	1	3	5	1	1	1	3	1	2	3
4	How do you decide what types of training to provide your team with?	Decision Making Process	4	4	4	4	4	4	4	4	4	4	4	4	4	4

#	Question	Category															
5	Which of the following factors contribute to your training provisioning decisions, and by how much?	Gap Identification	8	8	8		5	8	8	5	8	5	5	5	5	5	5
6	How do you encourage proactive knowledge and skills development in your team members?	Encouragement	3	2	4		4	4	4	4	4	2	4	4	4	4	4
7	How uniform (or standardized) is each of your team member's approach to delivering Customer Success?	Standardization	4	4	4		4	4	4	4	4	4	4	4	4	4	4
8	How do you usually develop a team member to prepare them for a new or additional specific task or role?	Task Development	7	7	7		7	7	7	7	7	7	7	7	7	7	7
9	How do you develop a team member to prepare them for a management/leadership role?	Leadership Development	7	7	7		7	2	7	7	7	7	7	7	7	7	7
10	How important to you is the ability to benchmark and prove your CSMs' capabilities through independent certification?	Benchmarking	4	2	4		4	4	4	4	4	5	4	6	4	2	4
11	How is your training budget and/or spending determined?	Budget Flexibility	7	7	7		7	7	2	7	7	8	7	7	7	7	7

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