



Researching, Developing, Implementing & Managing a Modern Customer Success Service

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Researching, Developing, Implementing & Managing a Modern Customer Success Service

Q1 - Part One - Research

January - Modern demands and challenges facing Customer Success

February - Research Techniques - what to research and how to go about it
March - Assessing Current Capability and Performing Gap Analysis

Q2 - Part Two - Development

April - Customer Needs and Segments and the Customer Journey
May - CSM Roles and Automation
June - CS Framework

Q3 - Part Three - Implementation

July - Training & certification
August - Coaching and Managing
September - Systems and Processes

Q4 - Part Four - Managing & Improving

October - Measuring & evaluating
November - Reporting & collaborating
December - Dealing with challenges and change

Video Recordings and PDF Notes of all events will be available for downloading.



Researching, Developing, Implementing & Managing a
Modern Customer Success Service

Part One

Modern Demands and Challenges facing Customer Success



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a Modern Customer Success Service

Modern Demands and Challenges facing Customer Success **AGENDA**

1

The "Outcomes Driven"
and "Rent Don't Buy"
Movements

2

Delivering Customer
Success Services to
ALL Customers

3

Proving the Value and
ROI from Customer
Success Services

4

Increasing the
Productivity and
Efficiency of the CS
Team

5

Turning Customer
Success from a Team
into a Culture

?

Questions and
Answers



Modern Demands and Challenges facing Customer Success

1

The “Outcomes Driven” and “Rent Don’t Buy” Movements



- Subscription economy is driving a lot of cloud and SaaS growth & consequently customer success growth
- Most businesses are understanding customers are more savvy, business leaders are expecting vendors to provide them with an outcome
- People don't buy things to enjoy buying them, they want a result from that purchase.
- A B2B business cannot afford to have extra tools just because they look great > that does not deliver shareholder value. It's about the result not the tool
- Customer is now more knowledgeable, it's the details now they need, therefore, it's important to go in consultatively. Customers are buying more than the product, but the entire experience.

Modern Demands and Challenges facing Customer Success

2

Delivering Customer Success Services to ALL Customers



- Challenging - In these times because of the pandemic it's wiser to look across all customers and touch all of them
- Data becomes really important, analyzing it accurately and correctly
- Analyzing customers that might be in a lower segment to reach out to them if they are doing something significant
- Idea: Segmenting by outcome requirement, understanding customers outcomes enables us to have a playbook > This is what we in Customer need to do to achieve that outcome, it focuses on that segment.
- Some of our biggest customers need us least, some of the smaller customers might really need the help, because they don't have the expertise a larger company may have.
- Maybe we can automate some things: For higher tiers give them self-service when self-service is better.

Modern Demands and Challenges facing Customer Success

3

Proving the Value and ROI from Customer Success Services



- We are referring to the value for us the supplier and the value for the customer
- The renewal is a by product of customer success - We get renewals because we go around doing customer success. A renewal should be a non-event, friction-free.
- Are we getting ROI from the investment we are doing in customer success
- Renewal is a lagging indicator it tells you what you did right not what you are doing right
- Constant duty of care towards the customer to make sure they are getting value throughout their journey
- Calculate investment in CSM's around training.
- The best CS team is not the one who had the most meetings, rather then measuring on that they could be measured on the level which the customer expresses and understands that they can control how the product delivers value to them. Increase outputs, it's our role to help the customer understand them.
- Outputs over time is progress over outcomes.
- Create a timeline where we give outputs over the quarters, we check specific milestones and in doing so we hit our objectives. By collecting the outputs you get the outcome.
- Achieving these milestones are markers & leading indicators that there is progress.
- Example: If an output requires the customer to use a form, then the leading indicator is that the form is being used.

Modern Demands and Challenges facing Customer Success

4

Increasing the Productivity and Efficiency of the CS Team



The leadership team needs to be clear about what their expectations are.

Skills a CSM needs to have:

- Product expertise - the CSM is the power customer of the product. They know the functions not how they work, but what they do/
- Industry expertise - Know the customers industry, understand their challenges.
- Customer success best practices - CSM's have an engagement, researching the customer, onboarding the customer, adoption and value realization phase. Then all of this can be automated.

Modern Demands and Challenges facing Customer Success

5

Turning Customer Success from a Team into a Culture



- How to develop customer success within a company.
- You need to have a leadership for reinforcing the customer is always at the front. Every company should have the goal to better serve our customer by (insert goal here)