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Selecting the Right Training Strategy for Customer Success Management

9 important questions the CS Leader should answer before purchasing or implementing training

PRACTICAL CSM ACADEMY

Foreword

This article aims to provide Customer Success leaders with a clear and simple framework for determining your CS teams training requirements, for selecting the right training strategy and for implementing and managing that strategy to a successful conclusion.

Following the format of this article and answering these nine questions in order should provide CS Leaders with a simple, step-by-step strategy development and implementation path that helps to reduce their planning time and increase the value attained from the training that they deploy.

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Q1: What do you need to achieve?

Our first question focuses on understanding your outcome requirements from a Customer Success Management training strategy. Identifying the destination as clearly as possible is what enables us to determine the best possible directions to take in order to arrive at that destination as efficiently and effectively as possible. The result from asking this first question will be a complete and unambiguous definition for the goals you need to achieve.

Inputs

- No input, this is your start point which you can do before, after, or in combination with Q2 if desired

Activities

- Work both alone and with your team to brainstorm all possible outcome requirements
- Work back through your brainstorm list to determine which outcomes are real and remove the rest
- Create a clear and unambiguous definition for each outcome, which should include a minimum of three aspects – Quality (what it is), Quantity (how much is required), and Deadline (by when it must be achieved)
- Prioritize each outcome requirement from most to least important (for example rate them from one to five)

Outputs

- A completed document that lists the outcomes required from your Customer Success Management training strategy in clear and unambiguous terms, prioritized in order of importance

Hints

- Remember to consider short, medium and long term goal requirements
- When brainstorming capture and document all ideas (no matter how strange). Sometimes even a seemingly ridiculous idea can spark a further idea later on
- Try to involve people with a diverse range of viewpoints, but make sure to only include those people whose viewpoints are truly valid
- Try to involve people at all levels from most senior to most junior
- Where possible make the process fun and enjoyable, as better results are likely to be yielded this way. Do not allow your brainstorming workshop to turn into a complaints session!
- Think about knowledge, skills and experience
- Think about confidence and as well as competence
- Think about uniformity and standardization across teams

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Q2: Where are you now?

Before you can commence your journey planning you must know your destination, and this concept was covered in Q1. In addition however, you must also know your present location, since it is the combination of both where you are now together with where you need to be that will enable you to work out how to get there. Not having a clear insight into your current position will cause potential losses in the efficiency and effectiveness of your final Customer Success Management training strategy.

Inputs

- No inputs required for this task, you can in fact complete it in parallel with or even before responding to Q2 if you so wish to, so long as both are completed one way or the other.

Activities

- Work both alone and with your team to uncover the entirety of your current position, which should include both what you already know and what you currently do
- Make sure you cover all aspects of what you do, including formal training and coaching and CPD but also informal group and one-to-one work
- Not everyone on your team is going to be (nor needs to be) at the same level, so divide up your team into relevant groups and document each group's current status. Where possible use these same groups in responding to Q1

Outputs

- The output from Q1 should be a clearly documented description for what you currently know and what you currently do in terms of training.

Hints

- Make sure that the people you ask to help you are clear about what you are doing and why. You need their help, so make sure they are motivated to assist you
- You do not need to complete the task all in one sitting. Do not make is so onerous that it becomes a task that never gets done and instead break it down into smaller parts and just do it a little at a time
- Documentation is essential so make sure you are recording all of the thoughts and ideas that come from your activities around both Q1 and Q2
- Think about where and how you format and store your documentation. Make sure that everyone that needs to access it can do so.

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Q3: What are your gaps?

Having completed the research on your desired and current positions in responding to Q1 and Q2, you can now move on to the analysis stage of your Customer Success Management training strategy formulation process. This question is all about differences, and in particular determining and documenting the differences between your current or "as-is" situation and your desired or "to-be" position. A comprehensive understanding of differences will enable you to be clear on what your training strategy will need to deliver.

Inputs

- Your response document from Q1 that describes your destination in detail
- Your response document from Q2 that describes your current position in detail

Activities

- As with any analysis, it can only be as good as the data upon which it is based, so before moving to this stage make sure that you have responded as fully and completely as possible to Q1 and Q2
- Document each gap as a "requirement" that needs to be filled or "met". Try to describe both what the gap is and also who the gap affects. If necessary you could also document the impact in positive terms (ie the potential benefits of meeting the requirement) and/or in negative terms (ie the potential consequences of not meeting the requirement).
- Rate each gap from 1 to 5 or 1 to 10 where a higher number indicates a higher priority (ie more importance) for fulfilment

Outputs

- The output from Q3 is a "gap analysis document"; a comprehensive list of each difference between current and desired situations and their relative importance, ready for you to begin your planning activities

Hints

- As you undergo the analysis you may uncover missing information – for example you may find you have a destination requirement from Q1 but no corresponding "as-is" position from Q2 to match it to, or vice versa. If this occurs simply go back to the relevant previous step to complete the uncovering and documentation of the missing information
- Gaps can come in various shapes and sizes. Try to quantify the size or amount of each "gap" as well as the quality or type of gap that you identify
- Alongside identifying each gap, you may find it useful at this stage to document the potential "gap closing solution" (ie what might be required to close the gap) for example training, or a playbook, or software, etc. Alternatively you can do this when you answer Q5
- You may sometimes find it easier administratively either to divide a big gap into several smaller ones, or conversely to group several smaller gaps into one larger one, depending upon needs and gap closing solutions. Use your own judgement to document gaps in as much or as little detail as you feel is right

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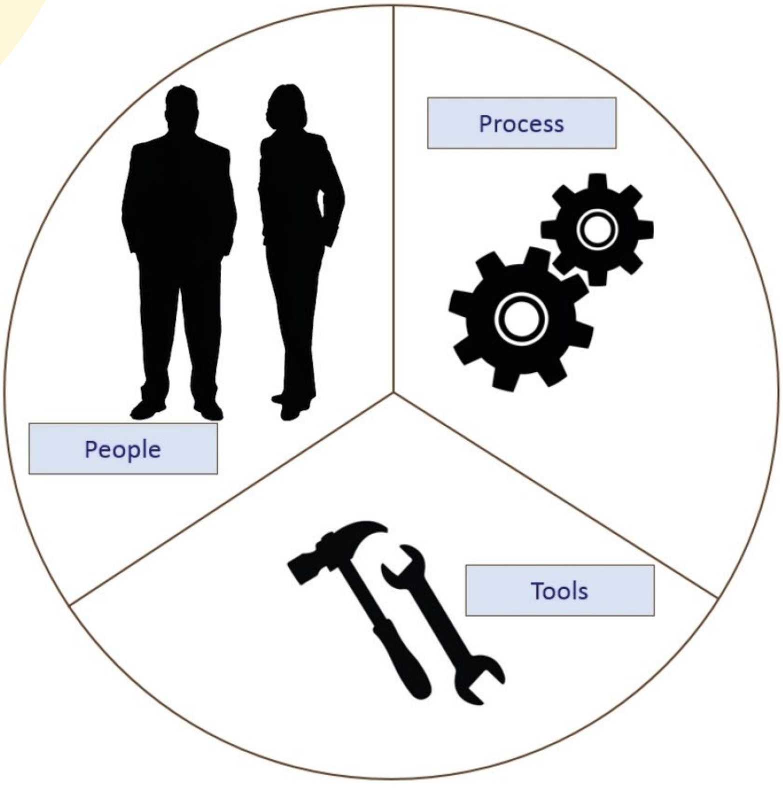
Understanding Capabilities

Why do I need to understand capabilities?

In order to answer Question 4 you need to understand what “Capabilities” are and how they work. If you already know this feel free to skip straight to Question 4. If you are unsure please read this brief explanation first.

What is a “Capability”?

A “capability” is an ability to perform a specific task in order to create an output, or result. Every capability has three components – process (the steps that are followed), people (the users that perform the steps in the process), and tools (any equipment that is used).



Example of a Capability

So for example a “Customized Functionality Order Taking” capability may require a CSM to complete an order form for a customer based upon that customer’s specific requirements for their additional functionality requirements, and then submit the order form to the development team for approval, and for them to schedule the development work, and then submit further details to the Finance team so they can issue an invoice to the customer to collect payment, then return to the customer with an estimated dated for completion of the work. So the “Customized Functionality Order Taking” capability includes process, people and tools.

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Ideas for Missing Capabilities

Product Domain

The Product Domain is the domain of expertize related to your own company's products and services. Capability required here might include (but not be limited to):

- Demonstrating and explaining features and functions
- Matching functions to business requirements
- Determining and pricing licensing options
- Determining and pricing customization options
- Determining and pricing integration options
- Matching user training requirements to user roles
- Determining and pricing user training options
- Determining and pricing renewal options.

Industry Domain

The Industry Domain is the domain of expertize related to your customers' industry or profession. Capability required here might include (but not be limited to):

- Understanding industry language and terminology
- Understanding current trends and industry drivers
- Identifying outcome requirements and targets
- Identifying problems, challenges and roadblocks
- Matching outcomes requirements to solution functions
- Explaining renewal options

Customer Success Domain

The Customer Success Domain is the domain of expertize related to customer success management best practices. Capability required here might include (but not be limited to):

- Understanding the philosophy behind customer success management
- Evangelizing the benefits of adopting customer success management services
- Explaining the role of the CSM
- Providing customer onboarding services
- Planning for customer adoption requirements
- Implementing customer adoption projects
- Determining ROI, KPIs and measurements based upon customer outcome requirements
- Analyzing and reporting on regular progress

Personal Qualities Domain

The Personal Qualities Domain is the domain of expertize related to each CSM's personal qualities and skills. Capability required here might include (but not be limited to):

- Stakeholder analysis
- People management
- Leadership and persuasion
- Negotiation and selling
- Creative problem solving
- Managing complex projects
- Time and task management
- Analysis and reporting

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Q4: What Capabilities are Required?

Now that you have documented the gaps, the next step is to determine what capabilities are needed to close each gap. For example if you have documented a gap in the way you hand over between salesperson and CSM then you now need to determine what is required – either a new process if one does not already exist, or perhaps improvements made to an existing process, a list of people that this change will impact, and any missing tools (for example software functionality) that may be required – process, people and tools.

Inputs

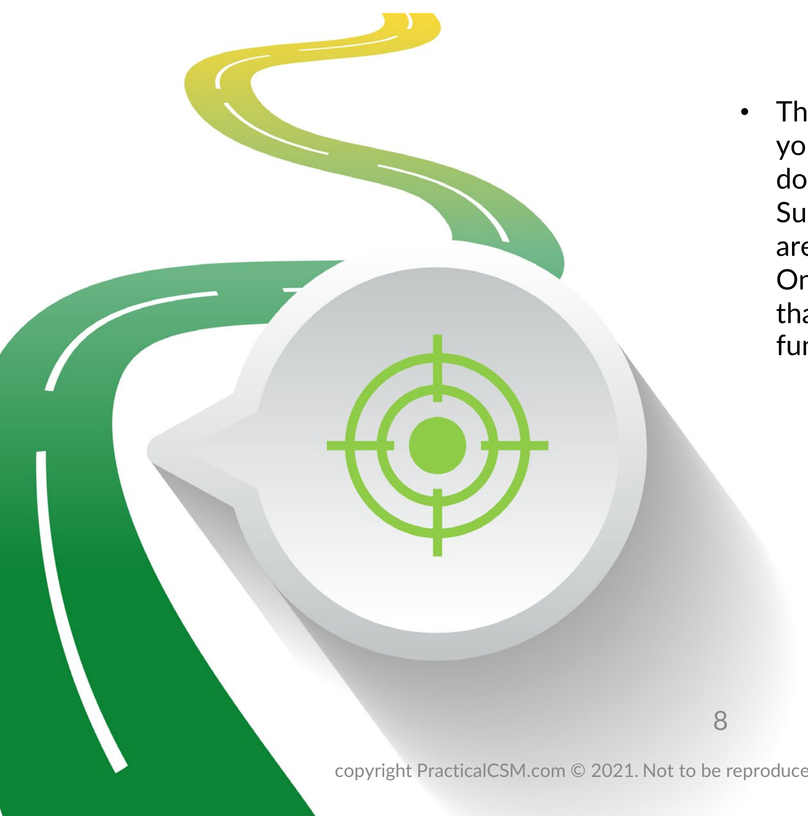
- Gap Analysis document completed in answering Q3

Activities

- Against each identified Gap, specify the missing capability requirements. This might be the entire capability – all of the process, people and tools – or just missing elements of it to boost its effectiveness
- For each capability identify all of the process, people and tools needed to make the capability complete (eg reduced number of process steps, new process to be created, numbers of people with specific skills required, new software functionality required, etc)

Outputs

- Capability Requirements document that identifies and describes all required capabilities



Hints

- This may seem like a daunting task to do on your own. To reduce that feeling, break it down into functional areas of Customer Success and just work with one functional area at a time (for example “Onboarding”). Once you have identified all gaps related to that functional area then move on to the next functional area

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Q5: How will you fulfil these capabilities?

To fulfil the capability requirements takes assets such as people, and resources such as money. In an ideal world you will be able to utilize your existing people and your existing written content such as playbooks, and existing software functionality such as your company's CRM system or even CS platform if you have one. But in most cases at least some of the desired content with which to populate your desired capabilities will need to be purchased (eg a new software application) or created (eg a new playbook or a new or an updated process).

Inputs

- The Capability Requirements document you have created when answering Q4

Activities

- Review each capability requirements and each capability requirement's individual components (process, people and tools) in the light of what assets and resources you have available and can therefore potentially allocate to that capability requirement
- Determine challenges and problems that may prevent the allocation of an asset or resource (for example availability, or amount of a resource at the required time
- Allocate assets and resources to each capability requirement
- Create a roadmap for activity required to enable these capability requirements

Outputs

- A CS Training Strategy Roadmap with a scheduled list of activities to be completed to fulfill all capability requirements

Hints

- This is the practical part of your planning, and it may require some lateral thinking, or even some false starts and going back and redoing to come up with the "right" strategy plan and roadmap
- Try to be realistic around time taken, cost, etc. To do this takes a balance between positivity and negativity. A too optimistic plan runs the risk of being underfunded and not producing the necessary results. On the other hand a too pessimistic plan may look unattractive for funding at all, or if it goes ahead may unnecessarily suck essential resources away from other important work

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Q6: What are your practical challenges and how will you overcome them?

Up until now we have taken a purely theoretical approach to the Customer Success Management training strategy formulation process, but now we need to get practical. Real-world factors such as budget availability, team members' time (individually and as a team) for training, locations, team members' differing needs based upon factors such as time zones, cultural and language differences, varieties of needs, motivation (or lack thereof) of team members, and other factors such as existing workload and specific deadlines for important existing initiatives will all need to be considered.

Inputs

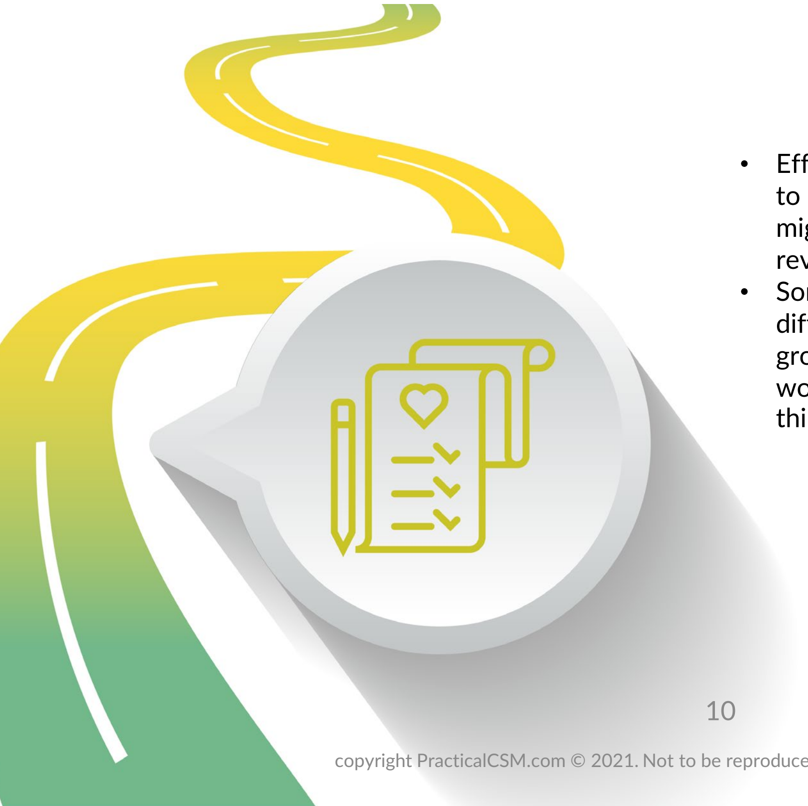
- The CS Training Strategy Roadmap created in response to Q5

Activities

- Review each activity in the roadmap in the light of what assets and resources you have available and can therefore potentially allocate to that capability requirement
- Determine challenges and problems that may prevent the allocation of an asset or resource (for example reduced availability of a member of staff if a large new deal is won, or the inability to release more than a certain amount of a resource at the required time)
- Where necessary, amend your plan to use additional or different assets and resources for each capability requirement to ensure they are realistically achievable
- Amend your roadmap for activity required to enable these capability requirements

Outputs

- Amended CS Training Strategy Plan and Roadmap documents with a realistic, scheduled list of activities to be completed to fulfill all capability requirements



Hints

- Effectively this step is simply a "check your work to make sure it's right" step. To do this well might best be achieved by getting others to review it with you or for you
- Sometimes challenges or problems can be difficult to foresee. Try getting together as a group and brainstorming challenges within a workshop environment to aid with creative thinking

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Q7: What do you need to do to gain the authority to proceed?

Once you have answered Q6 you should be in the possession of a "Training Strategy Plan and Roadmap" which have a timeline, which show all activities needed to create all missing capabilities and which document all required assets and resources for doing so. You are ready to go! However you may still require one further step, which is to secure the permission to move ahead. This might not be necessary in your organization if you already hold the authority to proceed, but for many organizations, the CS Leader will require some level of authorization to spend any substantial amount of time or money or other resources over and above pre-agreed levels, and this sort of project will very probably fall into that category.

Inputs

- The Amended CS Training Strategy Plan and Roadmap documents created in response to Q6.

Activities

- Make sure you know who you need to gain the authority to proceed from and how a business case (or proposal to spend money) should be presented. This may differ based on the size and/or scope of the project. Also there may be a clearly defined process and even template documents to use
- Create a business case based upon your Plan and Roadmap, containing:
    - Executive Summary (Half to one page only summary)
    - Purpose (What you are proposing and why you are proposing it)
    - Outcomes (What the business outcomes will be and when they will be attained)
    - Expenditure (What the costs will be and when they will be incurred)
    - Roadmap with major milestones
    - Appendices

Outputs

- A Business Case that is aimed specifically at the needs of and in the required format for the decision makers from whom you are seeking the authority to proceed.

Hints

- Approach decision makers informally in the first instance, to ask their advice as to how or when to make your formal submission. They may be able to give you some useful advice that could make all the difference as to whether your proposal gets accepted or rejected
- Do not get bogged down in the weeds with your business case. Don't get technical, keep it business focused and keep the conversation focused on the issues that concern them rather than those that concern you – for example cost, time and the ROI are of interest to them, but who in your team will be performing which activities is likely to be of less interest to them.
- If you really feel the need to include details, put them into an Appendix so they are available if required but out of the way if not

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Q8: How will you measure and report on ROI?

Before going ahead with the implementation of your Customer Success Management training strategy, make sure you have given due consideration to measurement and reporting. Starting with measurement you should first consider what you can measure that will act as a KPI (key performance indicator) of progress towards outcomes attainment. Then you should determine the practical side of how you will take measurements, what cadence (ie how often), and how to document, analyze and present the data to make it as useful as possible in management decision making. Finally make sure you have documented who you will be reporting to and in what format that report will be.

Inputs

- The Amended CS Training Strategy Plan and Roadmap documents created in response to Q6

Activities

- Determine what outcomes those who you will be reporting to will want to understand progress is being made towards
- Determine what KPIs (key performance indicators) you can measure that will help you to analyze and show this progress for each outcome
- Determine how the KPI should be measured, including how often and to what level of accuracy
- Take measurements as needed and analyze the data
- Create a report that uses the data to illustrate your findings, and where necessary include recommendations for changes

Outputs

- A pre-determined process for reporting on ROI that includes what information will be included, how it will be formatted and presented, who it will be presented to, and when, how often or in what circumstances this reporting will occur

Hints

- There may be a preferred format for reporting ROI on projects that your internal sponsors would like you to use. If there is then ask for a copy of the template or if no template then try to get hold of a well-formatted previous report that you can copy ideas from
- Know your panel ahead of time. If necessary do some work to understand what each panelist is responsible for and what they care about
- If possible talk to the panelists ahead of your meeting and start to form a trust relationship. Do not be afraid to ask them for advice
- Use pictorial representations of data (for example charts) to help illustrate important points
- If you are relatively inexperienced, consider practicing your presentation prior to presenting it

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Q9: How will you manage your Customer Success Management training strategy?

This final question is really about practical concerns at implementation. If you have thoroughly answered Q1 to Q8 then you should hopefully have a fairly watertight strategy plan. But even the best plans may very well still need adjustment as the implementation of them moves forwards. This can be due to unforeseen factors being uncovered that now need to be incorporated into the plan, or changes to requirements based upon adjustments to outcomes as time goes by. A combination of a sufficiently detailed plan with adequate flexibility to enable agile change is therefore important, as is the ability to creatively solve new challenges as they arise.

Inputs

- The Amended CS Training Strategy Plan and Roadmap documents created in response to Q6

Activities

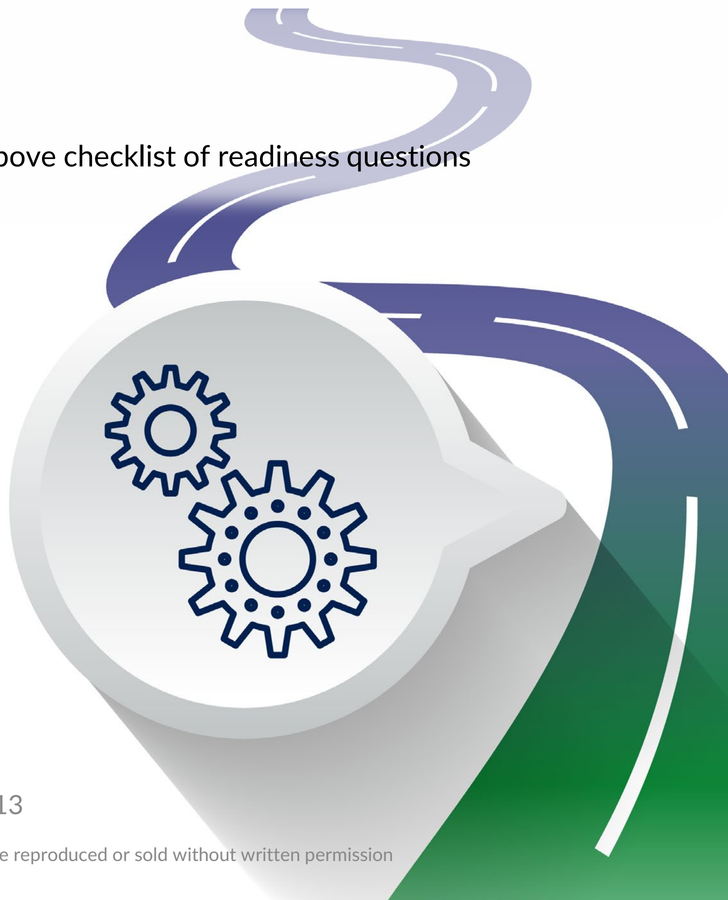
- To help ensure readiness, run through these questions either on paper or at least in your mind:
    - Am I clear as to the benefits of implementing this strategy, and are those benefits sufficiently compelling?
    - Do I have sufficient "buy in" from all levels to ensure the project's success?
    - Is this the right time to implement this strategy, or are there practical issues that we should resolve first before proceeding?
    - Is the plan sufficiently comprehensive (ie have we thought of everything)?
    - Is the plan sufficiently detailed (ie do we know what we need to do, and how to do it?)
    - Are we ready to start (in terms of assets, resources, permissions, etc)?
    - Do we know how we will be measuring and reporting on ROI, and are we ready to do so?

Outputs

- A set of "ticks" (mental or actual) against the above checklist of readiness questions

Hints

No more hints – it's time to get out there and do it!



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Conclusion

There is plenty to think about when creating a new Customer Success Management training strategy.

The start point should be to fix your goals, outcomes or "destination", in order to ensure that all further activities move you and your team in the right direction – towards rather than away from this destination.

After determining where you want to be, where you are now and where the gaps lie between these two, it becomes possible to determine and document your needs. And of course once the needs are documented it becomes easier to work out the best way of fulfilling those needs, taking into account all practical considerations that need to be allowed for.

After this it should be possible to create the plan, which will comprise of the roadmap plus roles, responsibilities and milestones. Finally make sure you have considered how to measure and record progress and who to report this progress to. As you move forwards with your strategy remember to maintain a flexible attitude towards change, since change is likely to need to occur.

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About The Author

Rick Adams

Founder and CEO - PracticalCSM.com

Rick Adams is a business owner, author, trainer and consultant, specializing in helping technology companies to deliver measurable business value to their customers. Adams has over 25 years' business experience including creating, managing and ultimately selling his own UK based Software-as-a-Service (SaaS) business and more recently founding his current company called the Practical CSM Academy that focuses on providing global customer success management consulting, training and certification services for everyone from aspiring CSM new starters through to seasoned senior CS leaders.

Adams' recent work includes the development and delivery of a global customer success management certification program for Cisco Systems Inc., 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 one of SuccessCoaching's Top 100 Customer Success Strategists in 2020, and one of SmartKarrot's Top 50 Customer Success Influencers 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.

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