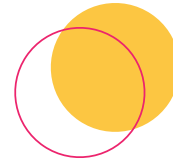


# HOW TO **KEEP** AND **GROW** YOUR CUSTOMERS WITH AN ONLINE COMMUNITY PLATFORM



# Table of Contents



## 1 What's in this guide?

Customer Success in B2B SaaS

## 2 Which metrics should Customer Success leaders care about?

1. Customer engagement
2. Customer satisfaction
3. Product adoption

## 3 How to offer effective self-service?

1. Launch an Online Community
2. Provide an easily maintained Knowledge Base
3. Make sure your Customer Success content is easily accessible

## 4 What should your customer success tech stack look like?

## 5 Integrating your tools to effectively scale customer success

1. Integrate a Community with your CRM
2. Combining community with your ticketing system
3. Integrate with your workflow tools

## 6 It's all about retention



## What's in this guide?

What does the future of Customer Success look like? It was no surprise that Customer Success took off a few years ago, especially given that its key metrics - customer retention, engagement, and satisfaction - are at the core of every SaaS business strategy. The very term itself drives home the need to make sure your customers are getting the value they expect out of your product. But how does your CS strategy continue to grow and evolve to keep pace with the ever-changing economy? What still keeps Customer Success Managers and leaders up at night? And most importantly, how can these challenges be addressed while ensuring the best possible user experience?





# Evolving Customer Success in B2B SaaS

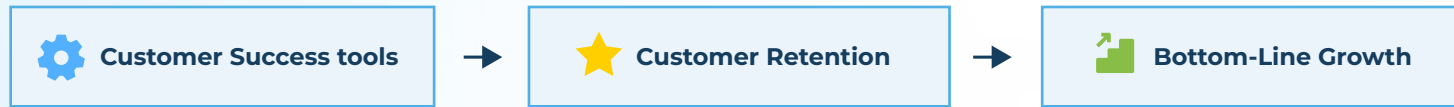
By definition, Customer Success **is the business methodology of ensuring customers achieve their desired outcomes while using your product or service.** The process of guiding customers to outcomes starts with understanding, and even anticipating, customer challenges or questions. For inbound marketing titans Hubspot, CS goes beyond just deeply understanding customers, but **“proactively providing solutions and answers to those issues prior to them arising.”**

Most B2B SaaS companies understand the importance of Customer Success, but building scalable processes and CS motions that still feel hyper-personalized to each individual customer can be challenging. As your business grows and evolves, the customer experience should follow suit, and that means re-evaluating Customer Success programs to meet your customers where they are at, providing them with tailored digital experiences designed to drive **customer retention.**

Let's take a look at why customer retention is so important: When you give customers the necessary tools they need to succeed, you increase the likelihood of them always getting maximum value from your product, and they become more likely to stick around. Essentially: The performance of your Customer Success team directly affects your bottom line.





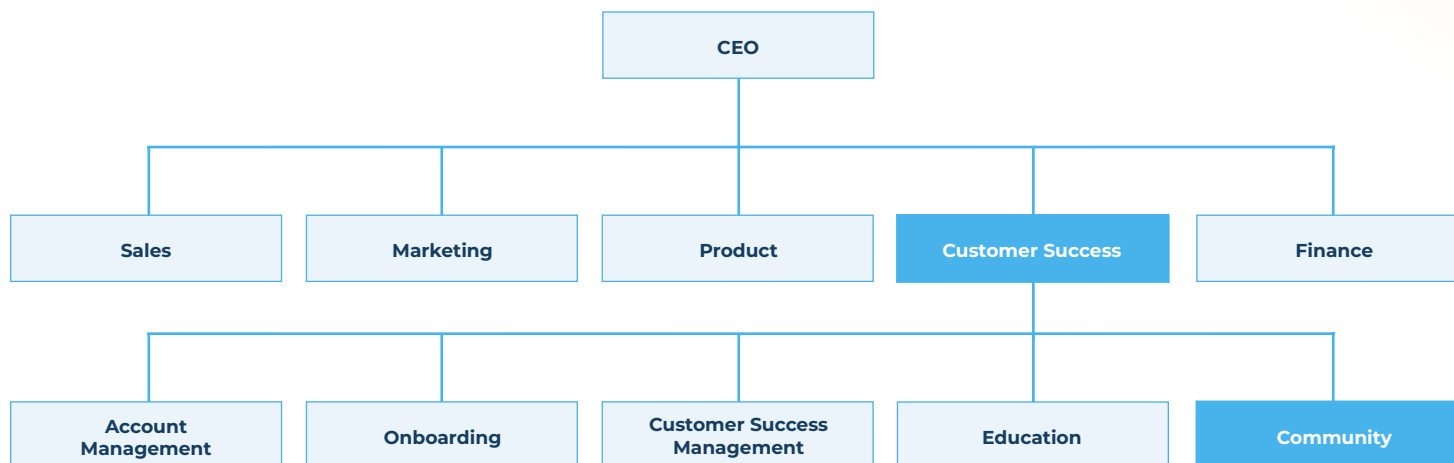


What's really important to remember is that Customer Success is a continuous process. It requires constantly ensuring every user is getting the most from your product. In other words: It's proactive, rather than reactive (as is the case with Customer Support). Customer Success is about finding ways to inform, update, and guide users on changes or different ways of using a product, all the while gathering their feedback and using it to inform product improvements.

The methods for educating and supporting customers throughout the entire lifecycle, right through renewal, have expanded and there are more tools than ever focused on helping customers be successful. There has been a massive increase in the demand for Customer Success training, tooling, resources, communities, platforms, and solutions. Establishing a CS organizational structure that fosters collaboration, maximizes efficiency, adapts easily, and rallies around driving customer outcomes is essential to keep up in this fast-paced environment. According to several surveys on B2B SaaS companies, **more than 90%** have a Customer Success team, with many Chief Customer Officers (CCO) reporting directly to the CEO. Clearly, companies are increasingly understanding that Customer Success is as important as Sales, Marketing, and Product, and more and more Customer Success leaders have a seat at the executive table, as can be seen from the typical org chart below:



## Typical organization chart for B2B software companies



A notable change with the boom of CS over the last few years is the expansion of the CCO's purview. Companies are realizing that CS is so much more than just a single department. CCOs are increasingly responsible for the end-to-end customer journey. From the moment a deal closes, someone from the Customer Success team is involved to assist with onboarding, education, support, product feedback, and communications, all the way through expansion. This organizational shift proactively puts the customer experience front and center.

While putting the customer experience under one purview is a huge win for Customer Success, it also exposes just how broken that experience currently is. Each team relies on different strategies, resources, and tools. And if you think it is confusing internally, just imagine how confusing it is for the customer! They aren't sure what system to turn to for answers, whether to raise a support ticket or email their CSM (or was it their Account Manager?!) **Blending human and digital touchpoints by centralizing these resources and providing a predictable space for customers to turn to is the next big evolution for Customer Success.**

How does this shift impact the metrics Customer Success teams should be focused on? Let's take a look!

# Which Metrics Should Customer Success Leaders Care About?



To put it simply, the main business objective is to keep your current customers and grow your bottom line. We understand this not just because we work with SaaS companies, but because we're a B2B software company too!

If you weren't already convinced that retention is at the heart of SaaS success—the figures don't lie. Upselling and retaining customers is significantly cheaper (somewhere between 4 and 9X) than acquiring new customers. Add to that the fact that a **5% growth in retention can lead to a 25% growth in profits**, and it's easy to see why SaaS companies are laser-focused on retention—us included.

But what are the core Customer Success metrics that drive B2B customer retention and how exactly do they reduce churn? Let's take a look at each one in detail:

## 1. Customer Engagement

Customer engagement can mean different things for different organizations. **Gainsight's** definition, for example, gets straight to the point: **"The interactions between the customer and the company or brand."** Our Global Lead of Community Strategy & Programs, Kenneth Refsgaard, neatly defines the two-way relationship building behind engagement:



**“Engaging with customers in SaaS is all about creating value together. Your customers want to learn, share and network with others who are trying to solve similar problems. When you help your customers meet those needs, they become healthier and happier. You’re able to drive tangible improvements to retention and expansion outcomes in a truly scalable way,”**



**Kenneth Refsgaard**

Global Lead, Community Strategy & Programs at Gainsight



With these definitions in mind, the business benefits of increased customer engagement can be divided into three main areas:

- ✓ **It Drives Retention:** An increase in B2B customer engagement leads to greater customer loyalty, or ‘stickiness’. Think about it, users are maximizing the value of your product and having their queries quickly and definitively resolved by people they trust. Not only are they less likely to churn, but some will even become your brand ambassador and best advocates.
- ✓ **You Build Better Products:** By increasing engagement, you are fueling interactions about your product amongst the people who use it every day. This creates a feedback loop that allows you to continuously improve your product based on users’ requests and suggestions and keeps your customers informed and up-to-date on any product updates or changes. Win-win!
- ✓ **You Boost Customer Support and Success:** When customers have the opportunity to interact with each other, they share best practices and get more from your product. This is great news for your Customer Success and Support teams, as users often answer each other’s questions. Interactions should also be on a one-to-many, rather than simply a one-to-one, basis where possible. This way your customers can easily benefit from each other’s knowledge (reducing pressure on your team) and you can quickly and easily engage with your customers.

Whatever you do, don’t underestimate the power of customer engagement to boost Customer Success.

## 2.Customer Satisfaction

The main focus of any CSM worth its salt is to maximize customer satisfaction and make the customer experience as good as it can possibly be. Of course, this is directly related to customer engagement and retention. The idea here being that the more engaged the customer, the more likely they are to get the most from your product and shout about their good experience—ultimately boosting your Customer Satisfaction scores and increasing stickiness.



## 3.Product Adoption

Finally, as a SaaS company, you should take pride in the number of people using your product and how much value they are getting from it. That's why product adoption figures are so important for overall success in SaaS, and why Customer Success teams are dead set on seeing them increase. Maximizing product adoption is about making sure customers have the necessary tools they need to get the most potential from your product at all times, including:

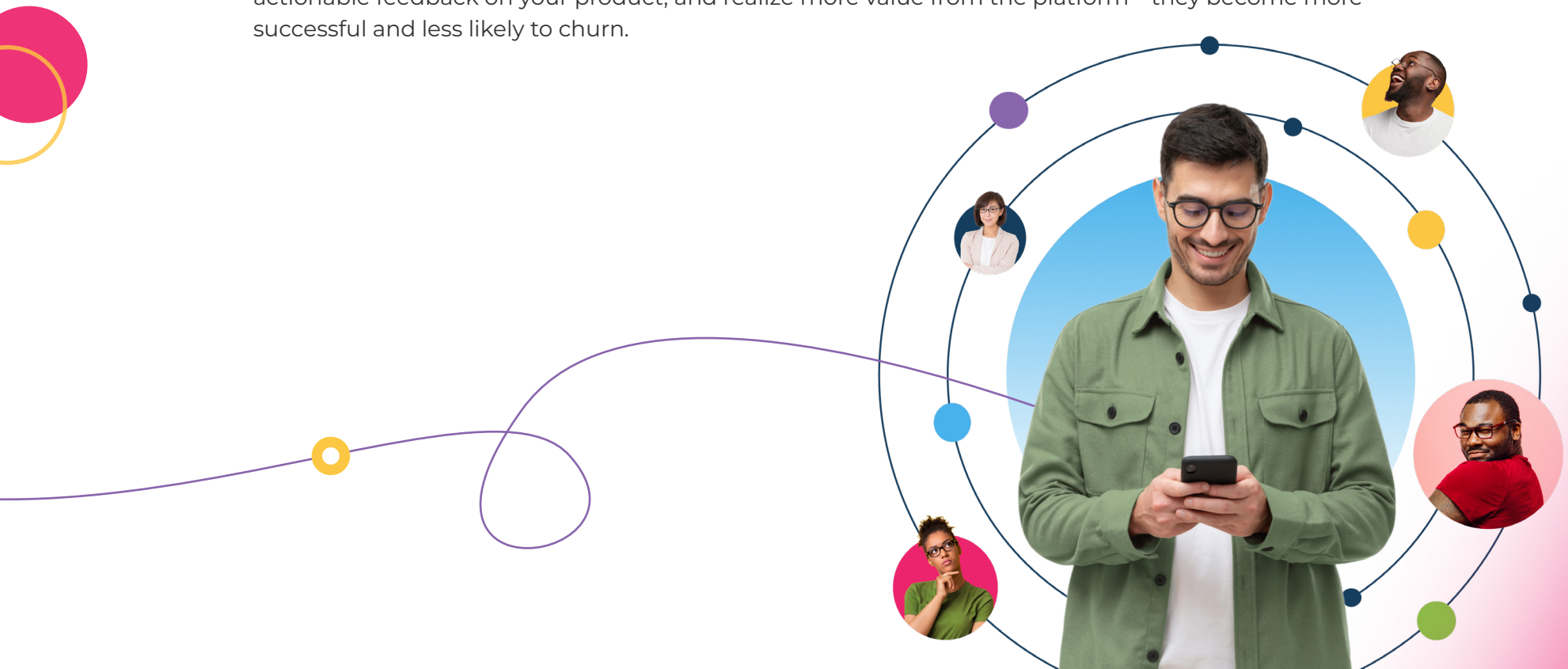
- During the onboarding process
- As you deliver new functionality
- When rolling out product updates



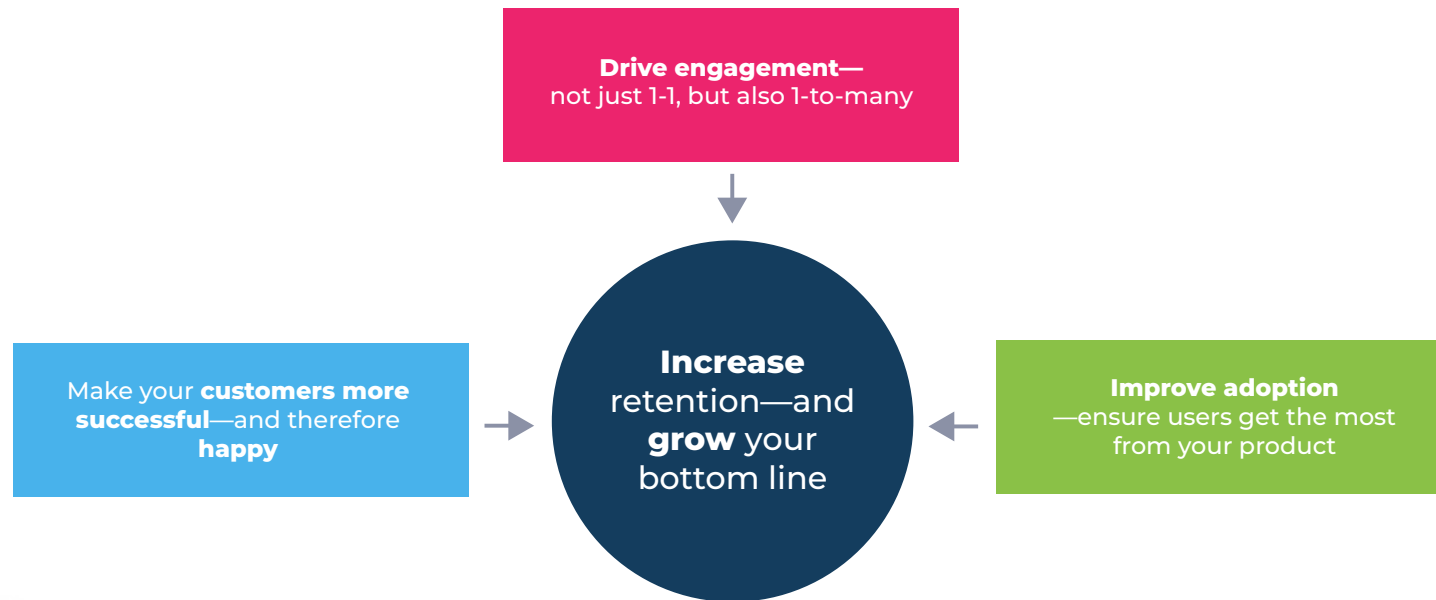
Achieving this comes down to effective communication between you and your customers. Importantly, these shouldn't be seen as one-off, or one-way, interactions. Just as you announce updates or feature roll-outs to your customers, they should also be able to give you feedback and suggestions to improve your product (after all, they are the ones using it every day!) Beta user groups are also a great way to glean customer feedback and sentiment for new features. This allows you to iron out any bugs or issues before a full roll-out—improving overall product adoption.

But this two-way communication with your users is about more than just testing the waters with new features and updates, or arming your Customer Success team with solid feedback to bring to your product team. It's about wanting your customers to be contributors to the overall vision of your product so that you can be sure you are always building a product that suits the needs of your users. Go on—let the voice of your customer help shape your product roadmap (within reason, of course).

This all links back to retention: As users adopt more functionality, add more data, are empowered to give actionable feedback on your product, and realize more value from the platform—they become more successful and less likely to churn.







It's easy to see why Customer Success impacts all corners of your business. Done well, Customer Success has the potential to influence decisions made in sales, marketing, product, training, support, and more—and can deliver practical, usable business recommendations that are backed up by rock-solid data and insights. That said, the seismic market shift towards SaaS has led to a huge increase in competition in the software market.

This increase in competition doesn't just mean more price competition. Nowadays customers (especially due to the rise of freemium SaaS models) can easily try a product, see if it fits their needs, and move on to the next vendor if not. The result? A huge increase in demand for cost-effective Customer Success models that drastically improve the customer experience.

Which brings us to the overarching question:



How can B2B SaaS companies keep and rapidly grow their customer base without pouring money and resources into the Customer Success department, all the while improving Customer Success metrics and enhancing the customer experience?

# The Key Lies in Offering Effective Customer Self-Service.



So, what exactly do we mean when we say **self-service**? In B2B SaaS, providing customer self-service is about making sure customers are able to quickly and easily find the answer to a given problem themselves, without having to contact your Support or Success teams for help. That said, while this is essential for the smooth running of your business, great customer self-service is about more than just ensuring users find the right answers. It's about giving people the tools they need to use your product in the ways that suit them best: From sharing best practices with other customers to reading tips and tricks from expert users.

In other words, self-service shouldn't just be a box-ticking exercise that's completed once a customer finds an answer to their question. Instead, it should be a fluid process that's constantly evolving and updating—making sure your users are armed with all the tools and information they need to get the most value from your product as it develops. According to a recent Forrester survey, **73% of people feel that valuing their time** is the most important thing companies can do to provide them with good service. The more resources and tools you provide them with to answer their queries and the faster they find those answers, the more likely they are to buy, use, reuse, and even recommend your product.

Ultimately, making sure that your users can help themselves should be at the cornerstone of all effective Customer Success efforts. With top-notch, speedy self-service you don't just have a satisfied customer who was helped with a problem, you have an ambassador who vouches for your business and may even help other users of your product.



So what does an effective self-service offering look like? We believe it comes down to four main elements:

## 1.Launch an Online Community

When it comes to tools that really drive Customer Success, look no further than online communities. Granted, not everyone jumps to the conclusion that an online community platform should be the go-to way to boost Customer Success and increase self-service. So, here's why more and more B2B software companies are realizing that community should be a mainstay in their Customer Success tech stack:



**How community impacts engagement**



### Next-Level User Engagement:

Often, customer engagement—especially in B2B SaaS companies—revolves around webinars, meet-ups, and round tables. But these can be time-consuming to organize, expensive to run and—most importantly—offer little in the way of concrete, measurable success data. With an online community, users can easily interact with each other and your organization, and you can keep track of customer interactions. Not only does this allow users to share best practices in an open, secure forum, but it empowers your customers as they can talk openly with their peers, who—let’s face it—they tend to trust more than your brand. Oh, and remember what we said earlier about the more engaged customer being more likely to stick around? Well, there’s no better way to encourage interaction and boost engagement than with a customer community!

### Reduce Support Tickets:

With online communities, users tend to answer each other’s questions, meaning customers can easily self-serve by finding the best-rated answers on the community—without contacting support. This allows your super users (those who use, and understand, your product the most) to help other users on a one-to-many platform. Still not convinced? We know what you are thinking—**“My customers won’t be active on the community... why would my users want to spend time helping other users?”** While these are perfectly normal concerns, the truth is that online community engagement results show the opposite. At Gainsight, we find that average peer-to-peer (P2P) engagement on our B2B communities is at a whopping 70%—that’s 20% above the industry average of 50%. This can reduce tickets by up to 50%, freeing up valuable time for your Customer Success and Support teams to focus on higher value tasks while also increasing customer happiness, and therefore, loyalty from your customers as they effortlessly self-serve.



### Are you thinking of launching a B2B community but you aren’t sure where to start?

Check out our eBook where we outline the 10 steps to kickstarting your own successful online community.

[Read the eBook →](#)



## 2. Provide an Easily Maintained Knowledge Base

Imagine you could have a tool that answers your customers' questions before they have even asked them. That's essentially what an effective, up-to-date knowledge base does—and it's one of the best ways to ensure users can self-serve.

But that's not all. If you combine your knowledge base with your **best user-generated content** from an online community platform, you have the potential to really take your self-service offering to the next level. This allows customers to make the most of content from their trustworthy peers (those who use your product day in, day out), and your company-created content which, when combined, makes sure your customers always get the most relevant answers and information they need.

A powerful knowledge base and community combination is also hugely valuable when it comes to allowing new customers to self-serve during onboarding. Think about it: New users can make use of your onboarding Customer Success content in the knowledge base (tutorials, FAQs, etc), while simultaneously having access to insightful customer-created content from the most experienced users in your community. As users interact more and more with each other this keeps the flow of relevant information about your product up-to-date, strengthening your knowledge base without any effort from your team. This means customers are always served the most helpful answers to their queries.

## 3. Make Sure Your Customer Success Content Is Easily Accessible

When it comes to effective Customer Success and self-service, content is king. In order to allow customers to self-serve, not only must your success content be available, it needs to be easily accessible. Success content might consist of anything from tutorials, to tips and tricks, to case studies—and the key lies in not only creating this material but also displaying it in the right place, at the right time. In other words: No matter where the customer is on your site, or whatever stage they're in when using your product, they can readily find the content that is most relevant to them. This might sound like a tall order, but it's essential to ensuring that customers have a seamless user experience and can easily self-serve. Let's be clear: An effective self-service offering is not just a nice-to-have—it's what customers expect.

Generally, customers who have to search long and hard for resolutions will either:

- A) Give up (and most likely be frustrated) or**
- B) Contact your Customer Support team for help**

To avoid these outcomes, deliver help content proactively with **in-product, -app, and -site engagements and Knowledge Center bots** that offer contextual content that is supported by smart search capabilities. Remember that a customer who can easily self-serve is more likely to be successful, more likely to reuse your product, and more likely to stick around. Add to this the fact that more and more **users now expect to find a quick answer** to their question online and you really see why accessible help content is a cornerstone of effectively scaling Customer Success.

One of the best steps you can take to make sure content is always on hand for your users is to have one dedicated go-to destination for it. Having an online community, which combines both your company's success content, and the best answers from your users, is a great way to do just that. Combining your community and knowledge base and offering smart, predictive search means that users looking for answers in the community can find knowledge base answers without navigating elsewhere, and vice-versa. Finally, this help content is gold to Google search and a huge majority of community traffic (from 60-80%) can come from organic search.





# What Should Your Customer Success Tech Stack Look Like?



So, we've established that when it comes to scaling Customer Success effectively you must facilitate customer self-service. That said, it's also hugely important that you have the right Customer Success tools—and that they are integrated—in order to unlock a whole host of user data and get a 360-degree view of your customer.

But what does that look like in practice? Which Customer Success tools should you have as you scale? And how do integrations really help your Customer Success team make data-driven decisions and become more efficient?

Let's take a look at the sliding scale when it comes to Customer Success team maturity: In terms of operations, ways of working, and particularly tooling. Here's how your Customer Success efforts might evolve as you grow.

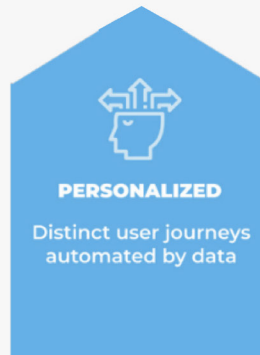
First things first, we want to say goodbye to reactive Customer Success. This might be ok if you're dealing with a handful of customers and only a few support and success employees that are on top of things but are mainly reactive in nature. They are reacting to incoming questions and requests and providing adequate, basic support. However, this isn't a sustainable solution.

Given our experience working with thousands of SaaS businesses at Gainsight, we created a series of strategies and options to help you understand how to incorporate digital strategies in one cohesive journey.

## Three “options” for ways you can use digital motions in your CS strategy



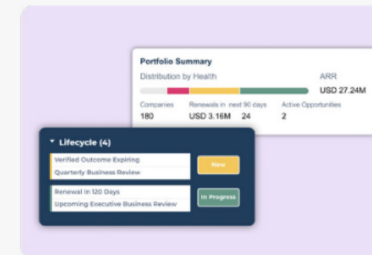
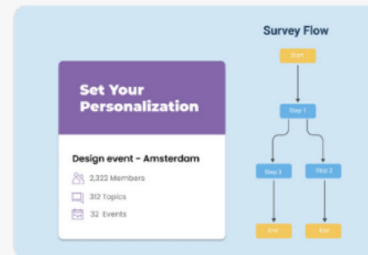
- Customer Portal
- Community
- In-App Knowledge Base



- Journey Orchestration
- In-App Engagement
- Pooled CSM



- Omnichannel Integration & Analytics
- Prescriptive Paths



Basic  
Support

Streamline  
Incoming Requests

Efficiency &  
Self-Service

Scale at  
Large

### **Option 1: Proactive Customer Success**

Your customer list is growing, you might implement a customer success platform like Gainsight and build out a health scoring model to proactively identify when a customer may need some attention. You've started to compile a lightweight company knowledge base to help your success and support teams up-level their outreach and support to customers.

### **Option 2: Personalized Self-Service**

Growth is happening fast and you are struggling to keep up internally. You have to spread yourself way too thin to manage the influx of customers, support requests, and user feedback. You're no longer able to be proactive and find yourself falling back into the reactive category. You can't afford to just hire 10 extra CSMs. What do you do? You need a way to communicate with your users on a one-to-many basis (as opposed to just one-to-one) and it's imperative you facilitate quick and easy customer self-service. That's where an online community, that can easily be combined with your knowledge base, comes in—allowing you to provide personalized in-product support to users and drastically improve customer engagement.

### **Option 3: Prescriptive**

You have customers everywhere! They are self-serving, interacting with each other, and your company and your Customer Success teams can focus on building out prescriptive customer journeys that help customers achieve their outcomes faster. It might be time to start exploring formalized education programs, like Gainsight Customer Education, to take your onboarding and self-service programs to the next level.



# Integrating Your Tools to Effectively Scale Customer Success



So your company is growing rapidly and you have a number of Customer Success tools in place—from a ticketing system to a CSP to an online community. But, as you know, different platforms help you in different ways. To make the most of them and ensure you get the best results for your Customer Success team, and indeed your business as a whole, you need to integrate! Here are a few examples of integrations that can really take your Customer Success from good to great:

## Integrate a Community with Your CRM & CSP:

Getting customer data that is both measurable and actionable can be a tricky task. That's where connecting your community and knowledge base with your Customer Success Platform (CSP), like Gainsight CS, can help you obtain a whole host of data about your customer that can be used to drive key strategic decisions in your Customer Success department. Here are a couple of examples:

### Unlocking Customer Engagement Data

Say your Customer Success team is struggling to get engagement metrics, integrations can go a long way to unlocking this information and arming your CSMs with information they need to make data-driven decisions. The Gainsight product suite deeply connects the data between Gainsight CS and Gainsight CC. For example, the one-click connection provides a seamless bi-directional data transfer and accurate account synchronization, so you can aggregate engagement data about companies as well as individuals.

This way you can understand which customers are interacting with community content, what they are finding useful (or not, as the case may be), and how recently they have been active on your community, for example.



Understanding the engagement sentiment of your customers is vitally important as it allows you to identify gaps in your success content while easily tracking which customers might be in need of extra guidance or support.

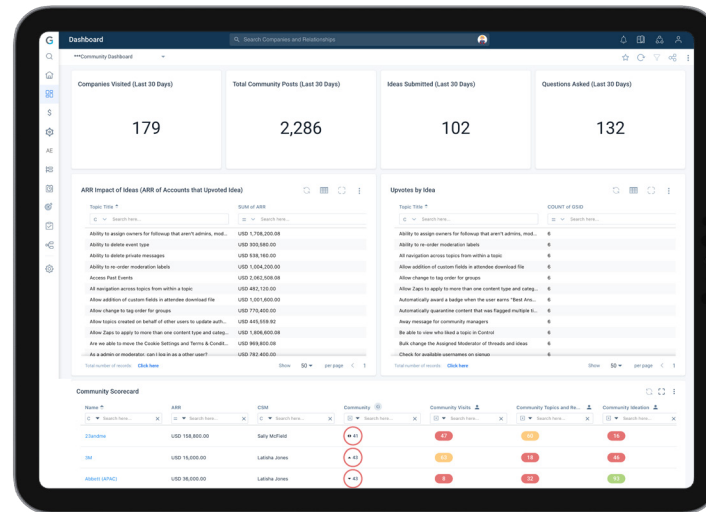
### **Easily Access Product Ideation Data that Helps you Build a Better Product**

Integrating a B2B customer community with your CRM can help you quickly and easily identify the most popular, useful, and valuable suggestions or product requests from your users. How? Let us explain.

As we established earlier, online communities are a great way to get feedback or suggestions from customers on your product. With a community, not only can a customer submit an idea, other users can also vote and/or comment on it, giving you solid insights into where your customers would like to see your product heading. That said, feedback and product ideation requests can be tough to keep track of and prioritize. For example, on the [Gainsight community](#), we find that between 30% and 40% of all user content posted can be found in the product ideation section—meaning there is a huge amount of feedback and requests to sift through. That's where integrating your community with your CRM comes in.

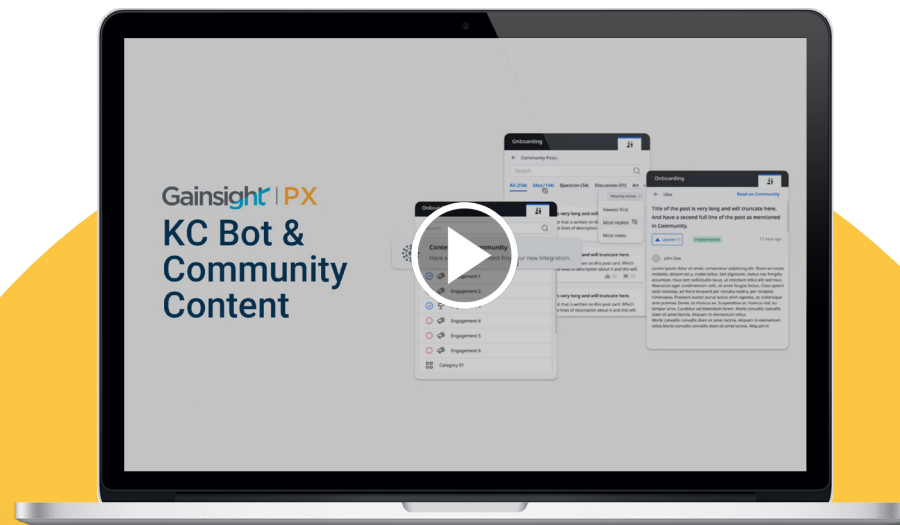
Our integration with Salesforce not only lets you see which customer feedback requests are most (or least) popular, but you can even attach the total ARR to feature requests from your customers. This allows you to identify which product suggestions are coming from your highest-value customers—meaning you can help your product team prioritize based on the monetary value of users' requests. No more assuming what the most pressing feature requests may be—now your CSMs can bring this solid data to your product team, making sure you are building a product that reflects the most pressing and valuable needs of your users. Here's an example of our product ideation dashboard when you integrate our community platform with Salesforce.





## Bringing Your Community Content in Product:

Surfacing timely and relevant content where your customers spend most of their time (in your product!) is an essential step to creating engagement, increasing satisfaction and boosting retention. The Gainsight product suite also provides the ability to easily create a Knowledge Center Bot using Gainsight PX that seamlessly consolidates and surfaces your community and knowledge base content within your product. Now, right at the moment of need, users can quickly search for answers using the user-generated and support content without ever navigating out of the product.



## Combining Community with Your Ticketing System:

While communities drive peer-to-peer support through the roof, there will always be a time when users ask tricky, often technical, questions that are better handled directly by your Support and Success teams.

Integrating a community with your ticketing system, such as Zendesk for example, allows you to quickly escalate those community questions (think account-specific issues or bug reports) in just one click. This easy ticket escalation frees up time for community managers (as they no longer have to manually submit tickets) and makes sure the right person responds to customer queries—meaning faster, better answers for your users. Win-win.

## Integrate with Your Workflow Tools:

Making your workflows as seamless as possible helps free up time for your teams and lets them focus on the areas they can add the most value. For example, being able to connect your community platform to other apps you and your teams are using internally, such as Jira, Slack, or Trello—via Zapier—allows you to easily automate and simplify workflows. Using Zapier as a bridge to all other elements of your tech stack means your CSMs will be notified when anything happens in your community, on any channel they want. A surefire way to ensure they never miss anything important from your community.



# In the End, Never Forget: It's All About Retention.



When scaling your Customer Success efforts—whether it is through improving your self-service, gathering insights into customer sentiment and behavior, or integrating your Customer Success platforms for a more seamless workflow—always remember the main goal: Retaining your customers and growing your ARR.

Don't lose sight of the fact that customer engagement, for example, is all about not only helping your customers in a one-off interaction or empowering them to help each other with an online community, it's about making them feel like they belong. The more they feel like they are part of your brand, and you make continuous efforts to treat them as such, the more likely they are to come back to your product and shout about it with their colleagues and friends.



**At the end of the day, SaaS is about two things: Providing a product that people love, and keeping people who love your product, happy—there's always room for both.**

You've already guessed that, here at Gainsight, Customer Success drives every decision we make. It's a conviction that has got us to where we are today, and it will continue to drive our growth goals for years to come. We truly believe in—and have proven—the power of community to keep and grow our customers. We hope you do too. In conclusion, here's our own model for Customer Success as a driver of SaaS business value. Please feel free to copy it and make it your own. Here's to your success!



# By Putting Humans at the Core

Today's Customers Need More than Just "Management"



Interested in measurably increasing retention, driving customer engagement, and boosting your Customer Success efforts? Get in touch with the Gainsight team and [book your free demo today.](#)



# About Gainsight

Gainsight's innovative platform helps companies of all sizes and industries drive durable growth through customer-led, product-led, and community-led strategies. It offers a powerful set of customer success, product experience, and community engagement solutions that together enable businesses to scale efficiently, create alignment, and put the customer at the heart of innovation. With Gainsight, it's never been easier to drive acquisition, increase product adoption, prevent churn, and grow with renewals and expansion. Learn how leading companies such as GE Digital, SAP Concur, and Box use Gainsight at [www.gainsight.com](https://www.gainsight.com).

Learn more about **Customer Communities** today →

