

Gainsight

Your Complete Guide To Purchasing The Right Customer Success Platform That Will Scale With You.



INTRODUCTION

So, you think you need a Customer Success Platform?

Today's business landscape, especially in SaaS, is more competitive than ever. Customer Success (CS) is core to retaining and growing your customers. According to [TSIA](#), "Customer success is no longer just a support function; it's a powerhouse **driving efficiencies** and **revenue growth** in your organization." For this reason, a Customer Success Platform (CSP) is a requirement to effectively retain your customers, scale customer-centered programs, and drive revenue.

An effective CSP creates a central source of truth, helping businesses to understand their customers through a single pane of glass. It also improves organizational communication and collaboration, guaranteeing that each customer achieves the desired outcomes with your product or service.

Whether a start-up, scale-up, or enterprise-level company, your chosen CSP should be an asset for companies at every growth stage. Its power lies in harnessing AI-driven efficiency and analytics, and offering insights into customer behavior and usage in each journey phase. It also elevates potential churn risks and revenue expansion, revealing cross-sells, upsells, and renewal opportunities. With a versatile CSP in place as an integrated component of their post-sales operating system, companies are able to leverage a variety of CS approaches such as efficient one-to-many digital customer success programs or high-touch one-on-one interactions to help grow their business.

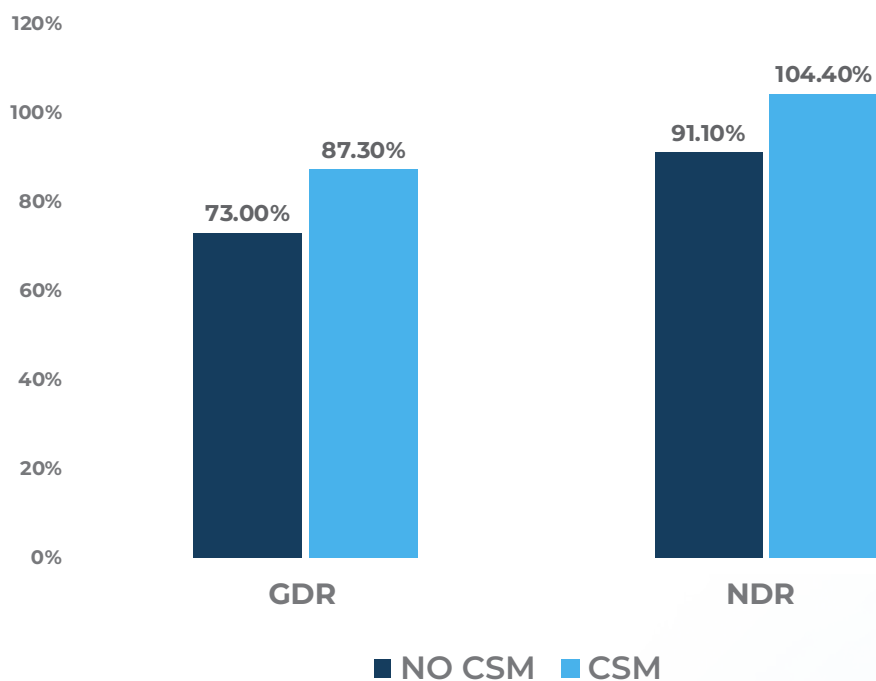
Most of all, a CSP enhances the customer experience at scale. It demonstrates the value of your product or service, confirming a return on investment (ROI) for both the customer and your company while balancing the total cost of ownership (TCO).



This guide will discuss these issues in depth, including building your business case, assembling your evaluation teams, honing your requirements, requesting a proof of concept and proposal, and ultimately selecting a vendor who will partner with you throughout your growth journey.

ROI OF CSM

COMPANIES WITH CSM ORG HAVE HIGHER GDR AND NDR



“I love that Gainsight is a sophisticated, enterprise-ready, single source of truth for our customers. Gainsight is the only reason we got any traction whatsoever with churn reduction.”

- **Carson Stones**, Senior Customer Success Director at data.world





PART 01

CSP Readiness, The Right Team, And Knowing Your Non-Negotiables

A CSP's advantages are multi-faceted. However, your company's challenges could be specific to your industry segment or field. When exploring different platforms, your chosen CSP should directly address those needs. So, let's start reviewing all the considerations that need to be made as part of achieving that objective.

There are three initial steps to purchasing a CSP:

- 1 Building a business case:**
This is the "why" behind the investment.
- 2 Creating an evaluation team:**
A balanced evaluation team comprises informed cross-functional decisionmakers who are involved in sharing buy-in for the purchase.
- 3 Building a vendor list:**
You need to create a short list of vendors to evaluate whose products will meet all your needs, now and in the future.

Simple? Setting up the process can be, but there are many variables to consider in order to select the right CSP and vendor partner for your business.

STEP
01

THE BUSINESS CASE

You may know a CSP is essential for developing customer success, experience, and revenue. But do your stakeholders? Include these key elements in your business case to convince them.

- **Current Pain Points:** Business cases must be built around identifying challenges that need to be solved and the metrics that will measure success.
- **Metrics to Measure:** Determine what metrics will improve with the application of your CSP, such as Net Revenue Retention (NRR), Gross Revenue Retention (GRR), account coverage ratios, Customer Lifetime Value (CLTV), Customer Satisfaction Score (CSAT), support ticket volume, and Net Promoter Score (NPS).
- **The Return on Investment (ROI) and Total Cost of Ownership (TCO):** ROI and TCO will quantify the financial benefits and costs of the CSP.
- **Customer Outcomes:** What outcomes do you need to help customers achieve by leveraging your CSP? How will achieving those outcomes support retention and expansion opportunities for your business?
- **Organizational Alignment:** Identify cross-functional friction points in the customer lifecycle and future goals across different teams (e.g., Sales, Product, Marketing, Support or Services), not just the Customer Success department, and how the CSP can solve them.
- **Operational Process and Workflow:** Evaluate the required CSP features and integrations, focusing on seamless connectivity with your existing tech stack such as your CRM system. Prioritize solutions that offer centralized data access and visibility to enhance efficiency and deliver an exceptional customer experience.
- **Company Maturity and Growth Strategy:** How can a CSP help reinforce and guide growth as your company matures?

All these factors form a compelling business case rationalizing the need for a CSP. However, decision-makers will require more transparent calculations that project ROI at the outset.

ROI projection is the most essential factor in a solid business case. You'll need to estimate how the CSP will prove lucrative for your company by customer segment and each area of your business.



Questions To Consider

- To what extent can the platform be customized to fit our specific needs?
- How scalable is the platform to accommodate increasing volumes of data and users?
- Can the vendor handle my needs as we scale and grow or will I need to eventually switch vendors?

Other determinants include CSP vendor stories and case studies, which are real-world examples of successful implementations. Lastly, you may not need specific operational processes and workflows now. However, will those features, integration methods, and metrics (e.g., cross-functional reporting and analysis) be available when you're ready for them?

The bottom line is your business case must justify how the CSP will drive positive customer outcomes and company growth.



What impact should your CSP make on your business? Check out these outcomes being achieved by Gainsight customers.

Swoogo's Revenue Operations Team Boosted GRR 7 Points and **Increased Customer Health 15%** with Gainsight.



[View Results >>](#)

LeanIX Drives **Increased Expansion Pipeline 80% YoY** Within Its Existing Multi-Product Ecosystem



[Learn How >>](#)

Popmenu **Improved CSM Coverage to 1:1,1250** On Lower ARR Customers.



[Read More >>](#)



Questions To Consider

- What measurable outcomes have customers achieved using this platform?
- How do vendors compare on G2, in Gartner or other analyst content, and in peer reviews?



STEP 02

CREATING AN EVALUATION TEAM

Getting organizational alignment is crucial for identifying the pain points your CSP needs to address. When organizing an evaluation team, include representatives from key departments such as Customer Success, Sales, Marketing, IT, Finance or others who may have involvement with the system. Any team who will frequently interact with the system and rely heavily on customer data should be considered. Involving diverse perspectives and expertise ensures all use cases are considered, from day-to-day operations to strategic decision-making. Here are the team members you may need to involve:

Key stakeholders and forming the evaluation team:



Revenue Team(s)

Whether you have a CRO overseeing marketing, sales and Customer Success, or these teams function independently and report directly to the CEO, your go-to-market functions play a key role in Customer Success. From customer advocacy, to cross-sells and upsells and through renewals, your selected CSP will be an asset in each of these departments.



Information Technology (IT)

Evaluates technical requirements, integrations, and security.



Finance

Assesses budget considerations, return on investment (ROI), and total cost of ownership (TCO).



Procurement

Manages vendor relationships and contract negotiations.

While each team member has insight and domain knowledge, the CS leader's voice should be the most influential if their team is responsible for the outcomes associated with the purchase.



Questions To Consider

- Are healthscores flexible and deep enough to accurately track customer health?
- Do out-of-the-box templates and integrations make this CSP easy to add to our tech stack?
- Can I automate the right aspects of my customer and CSMs experience, or will this tool add more manual work?
- Will I be able to scale my CS programs digitally and keep customer interactions personalized with this tool?



"Gainsight has helped our entire company start thinking about customer health, which has been a big culture shift. Gainsight lets us capture real metrics and data that show us how customers are performing and achieving outcomes."

- **Brenda Barry**, VP, Customer Success at Omnicell

STEP
03

NAILING YOUR REQUIREMENTS TO ADDRESS COMPREHENSIVE CS NEEDS

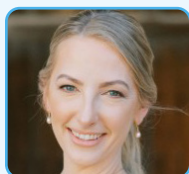
ROI-Driving Functionality

You want a CSP vendor and product that delivers functionality that, in turn, delivers ROI. Examples include proactively monitoring customer health and risk issues while improving customer experience and satisfaction. Another to consider is workflow management. A CSP should always streamline workflows, and increase efficiencies for your team.

Your CSP needs to meet your entire team's requirements for CS, and should be tailored to your company's maturity, growth strategy, and distinctive needs. Completing Gainsight's Value Plan is an excellent resource in this exercise by aligning the business case specifics to your company.

Here are some non-negotiable CSP capabilities you need to evaluate:

- 1. Generative AI & Automation:** Build more human connections through the power and efficiency of AI. If a CSP vendor doesn't have AI integrated throughout its product, you'll be behind other CS teams from the start. As you evaluate AI features, be sure to understand their impact and value they bring to both customers and your internal teams. AI done right should be a win-win for everyone.
- 2. Health Accuracy & Monitoring:** Deeply monitor customer health with flexibility, addressing problems and improving satisfaction to proactively impact customer relationships. Ensure you can obtain the appropriate 360-degree view at the company, relationship, and individual contact levels. Additionally, you should have the flexibility to create multiple health scores and weigh different measures to match your unique business value.
- 3. Workflow Management:** Streamline repetitive tasks, ensuring consistent customer interactions and less time on unnecessary motions



"Gainsight has helped boost product adoption by empowering CSMs to deliver personalized experiences to customers via multiple approaches from high-touch success calls to scalable, low-touch email outreaches."

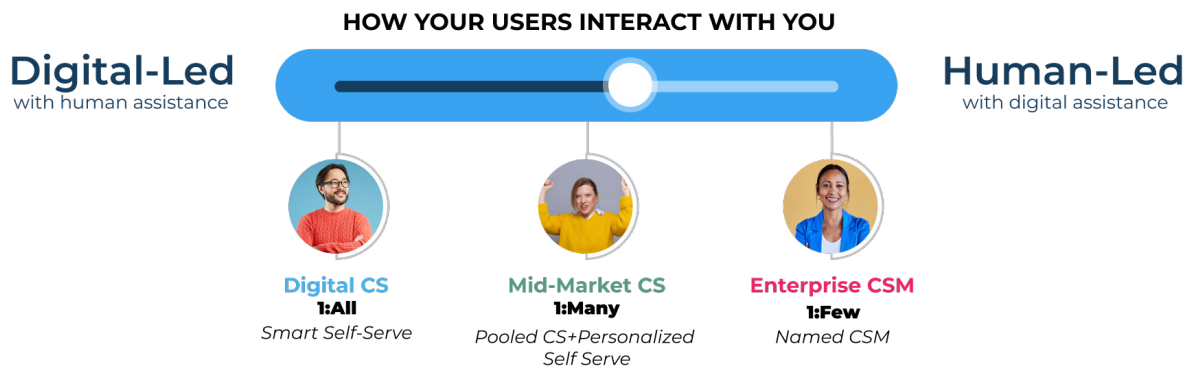
- **Brittany Habel**, Customer Success Operations Manager at ServiceTitan

- 4. Segmentation Capabilities:** Engage your customers at scale based on your model type, and have the ability to customize experiences based on segment within your customer base.

- **High-touch (1:Few) Enterprise CS:** Human-led with digital assistance contact for high-value accounts, capabilities including success plans with CTAs; templated, trackable emails that integrate into typical email workflows (for example, through your Gmail and within your CS platform)
- **Mid-touch (1:Many) Mid-Market CS:** Often used with mid-sized accounts in a pooled-CS configuration with some personalization self-serve. It includes playbooks that combine the above communication tactics for specific scenarios and journey orchestration that incorporates actual events from other platforms for just-in-time response where the customer needs it, whether in-app, via email, or through a CSM personal touch.
- **Tech-touch (1:All) Digital CS:** Considered “Smart” self-serve, it’s used for smaller accounts and engaging the long tail at scale. It is automated yet personalized through data-driven nurture emails, dynamically adapted to customer behavior (branching). It also allows for conditional waits.

DIGITAL ENABLES DYNAMIC SEGMENTATION

Digital Customer Success seamlessly adapts to every account type, fine-tuning the balance between human and digital interaction to meet distinct business requirements for each customer segment.



- 5. Robust Surveys:** Collect feedback to identify areas for improvement and measure customer satisfaction.
- 6. Mobile Integration:** Access key CSP features on the go, maintaining continuous customer support.
- 7. Apps and Platform Capabilities:** Integrate with other business applications for a unified tech ecosystem.

These functionalities work synchronously to improve customer relationships and derive value from those relationships.



Questions To Consider

- What AI-driven features are currently available, and what are planned for the future?
- How does your AI functionality bring value to both internal teams and customers?
- How does your AI leverage customer data to give insights and predictive analytics, such as customer churn or identifying upsell opportunities?
- What measures do you take to ensure the security and privacy of data used by AI?

Platform

You want a CSP vendor and product that delivers functionality that, in turn, delivers ROI. Examples include proactively monitoring customer health and risk issues while improving customer experience and satisfaction. Another to consider is workflow management. A CSP should always streamline workflows, and increase efficiencies for your team.

To aid in this evaluation, consider inspecting the following areas:

- **Integrated Ecosystem:** Integrates smoothly with a CRM (e.g., Salesforce, HubSpot, Dynamics), ERP (e.g., SAP, Oracle), and other business systems with pre-built connectors. Ensures API compatibility for seamless integration with existing IT infrastructure. Enablement of bidirectional data flow, exchange, and synchronization across all integrated systems, avoiding data silos to ensure all systems are updated in real-time.
- **Open Data Model:** Supports a flexible data model that can adapt to various data sources, warehouses, BI tools, and structures. **WARNING:** Some CSPs offer a black-box approach that requires you to fit your data into a predefined structure with no flexibility. Does it supply APIs and ETL tools to facilitate data extraction, transformation, and loading across different tools? The model must be compatible with significant data standards and formats (JSON, XML, CSV) while supporting real-time data streaming and batch processing. Does it ensure data can be easily exported, imported, and transformed as needed?
- **CRM Integrations:** Real-time data syncing between CRM systems and CSP, including customer data, contact information, interaction history, and deal stages, is necessary. It must demonstrate a unified view of the customer journey, including all customer interactions, from sales to ongoing support. This enables CSMs to access CRM with usage and support data within the platform, reducing the need to switch between systems. Ensures CRM updates reflect immediately within the customer success platform and vice versa.
- **Self-Service Options:** Supply APIs for integrating self-service options with other IT systems. Offer a knowledge base with easily searchable and regularly updated articles, guides, and FAQs. Implement chatbots and AI-driven assistants for real-time support. Supplies a customer portal where users can track their progress, access resources, and submit support tickets. Executes analytics to track self-service usage and identify areas for improvement.
- **Best Practices:** Embedded and automated best practices within the platform through templates, workflows, and playbooks. Administer guided setups, training modules, certification programs, and wizards within the platform to help teams implement customer success strategies



Questions To Consider

- How well does the CS platform integrate with existing CRM, ERP, and other systems?
- Does the platform comply with industry-specific regulations and standards (e.g., GDPR, HIPAA)?
- What security measures are in place to protect customer data e.g., encryption, access controls)?
- Can we set role-based access to ensure only authorized personnel can access sensitive data, and how granular are they?

effectively with continuous learning. Include benchmarking tools to compare performance against industry standards. Use data analytics to refine and update best practices based on successful customer interactions.

- **Role-based Access:** Implement role-based access controls to restrict data and functionalities based on user roles (e.g., CSMs, support agents, managers). This ensures sensitive information is only accessible to authorized personnel and enables custom role creation to fit specific organizational needs.
- **Security and AI Security:** Utilize encryption for data at rest and in transit. Implement enhanced security by implementing multi-factor authentication (MFA) and single sign-on (SSO). Conduct regular security audits and compliance checks. For AI, ensure AI models used for customer insights and automation are secure and free from biases. Implements monitoring and validation processes for AI algorithms to maintain accuracy and security.
- **User Experience:** Designed with a user-friendly interface, easy navigation, and a minimal learning curve. Provide customization options for dashboards and reports to cater to different user preferences. Ensures responsive design for accessibility across devices like desktop, tablet, and mobile.



CRM + CSP: Why You Need Both

A CRM, like Salesforce, Microsoft Dynamics, or Hubspot, and a Customer Success Platform (CSP) each play distinct and essential roles in managing customer relationships and ensuring customer success:

Customer Relationship Management (CRM) System

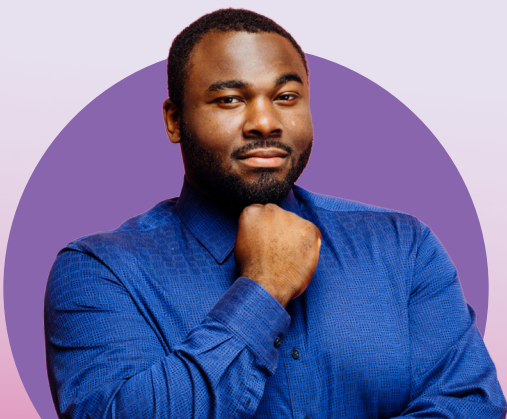
Customer Relationship Management (CRM) systems manage relationships across sales, marketing, and service interactions. Developed in the 1980s and 90s, CRMs excel in sales force automation, creating, managing, and reporting on sales opportunities. They provide essential tools for managing sales pipelines and tracking customer interactions.

Customer Success Platform (CSP)

Customer Success Platforms (CSPs) bridge the gap between sales and customer support, ensuring customers achieve value from your products. CSPs focus on monitoring customer health, managing success initiatives, and providing proactive support to enhance satisfaction.

Better Together: The Power of Integration

- **Synergy:** CRMs are optimized to manage sales and marketing, while CSPs are purpose built to holistically manage the customer journey and relationship post-purchase, ensuring ongoing customer success.
- **Comprehensive View:** Combining a CRM and CSP provides a complete, end-to-end view of the customer lifecycle, from initial purchase to long-term engagement. CSPs take on the task of providing a granular understanding of customer health and satisfaction at a level not found in CRMs.
- **Strategic Advantage:** CSPs both track customer health and offer tools to take action on customer signals with automated customer journey touchpoints leveraging the latest technology like AI, which complements human engagements. By pairing insights and actions, CSPs offer a strategic way to track and influence customers. When combined with a CRM, that advantage extends to revenue and retention efforts as well.
- **Data-Driven Insights:** The integration of a CSP and CRM enriches data analysis, driving success and growth. CSPs capture, collaborate, and execute on customers' desired outcomes, offering visibility across all engagements and checkpoints. This helps identify upsell opportunities and ensures proactive management of the customer relationship.

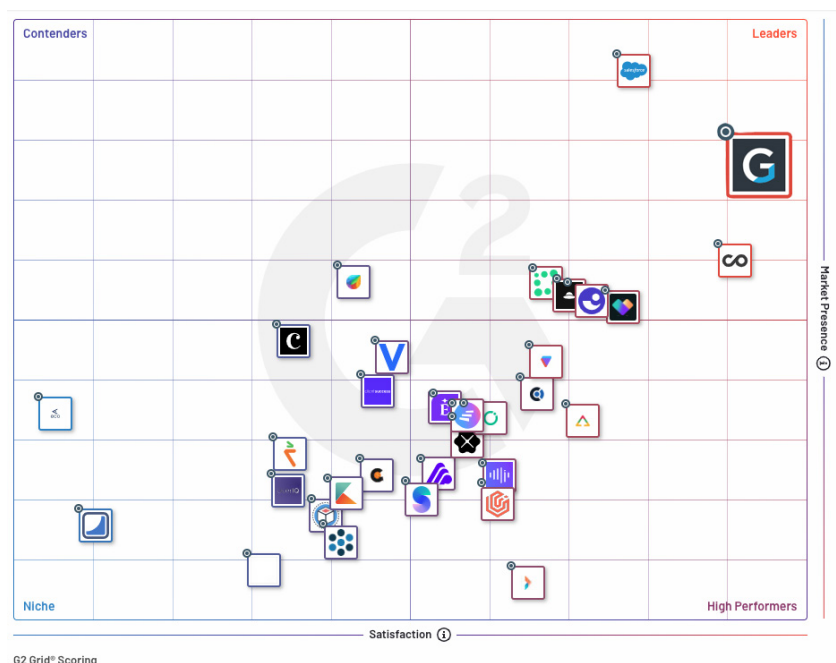


Choosing the best CSP for your organization depends on comprehensive vendor research. While online reviews and analyst reports, like Gartner, are valuable, word-of-mouth testimony often gives clarity. Connecting with peers in similar industries with a CSP in their tech stack helps as their insights often reveal practical experiences you may have yet to consider.

You'll also want to evaluate vendors based on readiness, scalability, integration capabilities, and security considerations to help ensure a strategic fit for your company.

Lastly, consider non-technical elements, like company vision and thought leadership, and if there is longevity to the partnership with your company.

G2 Grid® for Customer Success





PART 02

Solution Presentations and Proof of Concept

As you work to understand vendor capabilities and CSP functionality more thoroughly, it is likely more nuanced requirements will emerge. It will be imperative to see first-hand how your short list of CSP vendors can address all of your requirements directly. Your evaluation team will also start to better understand resource implications and needs that will become factors in implementation, onboarding and early adoption of the solution.

All of these factors work together and will help you know what to evaluate as part of vendor presentations.



“I think the most impactful thing from a renewal standpoint is since we have rolled out some of these risk mitigation programs, we’ve seen the renewal rate increase by about 12 points on average.”

- **Victoria Griffin**, VP of Account Management and Customer Success, Acquia

Solution Presentations

These presentations are indispensable as they demonstrate how their CSP is tailored to your specific use case. It is not enough for vendors to present generic demonstrations; they must show how their platform can solve your pain points and enhance your existing processes. If you previously evaluated a CSP a few years ago, it’s crucial to take another look. The rapid pace of change, advancements in AI,

and market dynamics mean that a new evaluation is essential to ensure you don't miss out on the latest innovations and improvements that can drive your success.

During these presentations, pay close attention to how well the platform integrates with your current systems and workflows. Also, consider the vendor's roadmap and future development plans. This may reveal whether the platform can evolve to meet your future needs, guaranteeing long-term value and confidence in your choice.

Be sure your presentations prioritize key activities and workflows identified by cross-functional teams when forming your business case and requirements. Involving stakeholders from IT, procurement, and finance early and throughout the assessment helps prevent reversed decisions in the end.

Proof of Concept

Given the scope of importance and investment of a CSP, you **SHOULD** ask vendors to go beyond a personalized demo and offer a Proof of Concept (POC). There is no better way to test their CSP's capabilities, ensuring that the selected solution addresses specific pain points adequately.

A POC validates the platform's effectiveness in real-world scenarios. It proves that their product is effective and capable of managing your company's data handling, workflow requirements, and scalability. Without a POC, you may discover too late that the platform cannot perform as promised, resulting in setbacks, including the need to start the evaluation process all over again when the initial contract term ends.

The POC will also give you perspective on the vendor's implementation and will help your team understand what resources are required from your perspective. The aim is to guarantee that the CSP can actually deliver on your requirements and fulfill the promises made during the sales process.



Questions To Consider

- Will I get the right support with best practices and how-to content from this vendor?
- What qualifications and experience do your CSMs typically have, and what ongoing training and professional development do they receive?
- Will they be a partner to my business, or more hands off?



Gainsight Joyride

Here are your keys to Gainsight.

No one said a POC can't be fun. Take Gainsight CS for a Joyride to explore how the system - with all its twists and turns, and surprise benefits - will work for your business.

[Request a POC](#)





PART 03

Selection and Contracts

If you've followed the guide we've outlined above and carefully weighed the data and feedback you've gathered, then you are ready to make your selection! Bring the Evaluation Team back together so you can share analyses and perspectives—and feel confident about the CSM vendor and solution you select.

Selection and Contracts

Your final selection will be based on a combination of factors, including the platform's functionality, the vendor's ability to address your specific requirements, and the overall cost of ownership versus projected ROI. Once you have made your selection, it is time to negotiate and finalize the contractual terms.

- Pricing
- Payment terms
- Service level agreements (SLAs)
- Included features, such as AI, and whether they are included or an add-on.
- Implementation and any other details.

It is also wise to include provisions for ongoing support and future upgrades to protect your investment and ensure continued success.



Questions To Consider

- What is the long term viability of this vendor? Is there a chance they aren't around in 5 years?
- Will this vendor's roadmap match your growth goals?
- Can the vendor solve multiple needs beyond just one product?

Conclusion

To make an informed and confident CSP purchase, your team leaders should meticulously review the entire process, from the business case and project scope to the solution presentations and, of course, the commercial terms of the proposed contract.



“We have an extremely close partnership with Gainsight, and have had for a long time. What really makes a difference for us, is that Gainsight is nurturing and connecting a thriving community of Customer Success evangelists.”

- **Christophe Bodin**, Chief Customer Officer at Anaplan

This purchase is one of the most important your company will make as part of a complete post-sales operating system. We all have technology biases and preferences, but the Customer Success solution you need should be one that stands the test of time, continuously evolving in its mission and growth while supporting businesses of all sizes and stages of growth. Economic winds are constantly blowing, and businesses of all sizes are under pressure, creating the need for certainty in making an investment in a versatile CSP that is flexible to meet changing needs of your customers, your business and the market.



Questions To Consider

- Do you have a customer community my team and I can join to learn from other customers' experiences and to address our own needs with the product?
- What additional support resources exist in terms of events, webinars, or meetups for community members?
- What support resources are available through the community (e.g., forums, knowledge base, user groups)?



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Get More From Gainsight

Expand your expertise and tap into the knowledge of other customer success professionals through Gainsight's resources and community.

CSP Buyer Checklist

Download our Buyer Checklist as a quick reference for questions to ask, things to consider, and what to focus on during your evaluation.



Pulse Library

Dive into a wealth of knowledge with on-demand content from past Pulse conferences.



GameChanger Community

Connect, learn, and grow with peers in the ultimate support and learning network.



Gainsight Resources

Elevate your knowledge through our guides, eBooks, and online events.

