STRIKEDECK

THE ESSENTIAL HANDBOOK

For Customer Success

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Active management of customer relationships

CHURN

EXISTING REVENUE
NEW SALES

"For example, if somebody is paying you $ 15 a month for your product, that's great. You want them to pay $15 a month for as long as possible. But wouldn't it be even better if they paid you $15, then $18, then $25, then $30 a month?"

The Importance of Customer Success

With the emergence of the subscription economy, in which products are purchased as services, monthly operational costs can be rationalized more easily than large capital expenditures, as they are amortized over a long time period, instead of charged all at once.

Software offerings like human capital management, eLearning, and sales force automation are almost exclusively sold via the SaaS delivery model, as their product is service based. Industries such as media and entertainment, publishing, and computer storage are all moving in the direction of adopting subscription models as well.

Customer Success management is the solution for establishing strong relationships with your customers, and gaining a quantifiable return on investment. By helping your customers realize the increased value from your product or service, they are more likely to increase the number of licenses they purchase, resulting in increased revenue. Most industries now recognize the growth potential of Customer Success, as there are over 250,000 jobs open for various CS roles.

4 Reasons why you should kick-off Customer Success management in your company:

1. Customer Success teams **achieve and elevate the expectations of your new customers** by fulfilling the promises made by your Marketing and Sales teams. Your customers will feel valued when they have someone to turn to who is willing to work with them closely to solve any issues.

2. With an **increasing number of your competitors** applying Customer Success management techniques in their companies, they will be eager to capture your lost leads. A CS team will help prevent customer poaching.

3. **Software can be complex**. If your product has multiple use case scenarios, you need someone to work with your customers right from the start to make sure they get off on the right foot. A CS team provides the enduring relationship based service that Support teams cannot.

4. A good Customer Success process **reduces churn and increases your revenue**. This is extremely beneficial for you - a churn reduction of 4% can double your MMR.

Customer Success Managers

PROACTIVE IN THEIR APPROACH

REGARDED AS THE TRUSTED ADVISOR WITHIN THE COMPANY WITH HOLISTIC VIEW OF THE CUSTOMERS

RELATIONSHIP ORIENTED

Account Management Managers

REACTIVE IN THEIR APPROACH

MANAGE ESCALATIONS AND RENEWALS

FINANCIALLY DRIVEN

Customer Support Managers

REACTIVE IN THEIR APPROACH

MANAGE INDIVIDUAL TICKETS

DAY-TO-DAY SUPPORT

Customer Success Managers

CONCERNED WITH CUSTOMER LIFETIME VALUE

HELP CUSTOMERS ACHIEVE THEIR DESIRED OUTCOMES

MONITOR TICKETS & KEEP TRACK OF CUSTOMER PERFORMANCE

Embarking on a Customer Success Management Journey

Customer Success management is not about technology, or account management. It is a disciplined approach that emphasizes:

The right **customer experience strategy**

Defining and following **standardized engagement processes**

Hiring the **perfect profile**, and managing the team during daily operations

Empowering Customer Success managers with key customer data including usage, finances, feedback, and much more so that they can have the right conversations with their customers

Customer Success Goals

Value for the Company

Breaking down the commercial value of customer relationships via metrics like monthly recurring revenue (MRR), bookings, referrals and references,etc.

Value for the Customer

Measuring for the value of a customer via metrics such as the duration of period it takes for successful implementation, growth of the program for the customer, and whether the value if product is maximized.

Practice Improvement

Encouraging continuous and rapid improvement by investing in our people, our processes, and streamlined daily operation is essential. We need a set of criteria and metrics to monitor to keep progress on track.

Customer Centricity

Having a prominent and effective Customer Success department will allow a pervasive, customer- centric, mentality to develop in all sectors of a company, even those who aren’t customer-facing.

The Do's & Don'ts of Customer Success

Do: Answer Every Complaint

The aim of your job is to answer any of queries in order to help your customers experience maximum product value. No matter the topic and the tone used, whether it is a complaint or compliment, answer each and every message you get. It is the least you can do since they have taken the effort to reach out and provide feedback.

Don't: Make Promises You Cannot Keep

If you tell a customer that an order will be on time, it had better be there by that time. If you cannot give a guarantee, then do not make that promise to the customer. It is better to say it will be there by Friday, and deliver a few days early, than disappoint the customer.

Do: Extend Help, Even If It Is Not Your Product

Even if the assistance needed is for a product that is not your own, extend a helping hand regardless. Customers remember the people who help them; the goodwill you engender by solving their problem will yield positive returns.

Don't: Forget To Draw The Line & Know When To Stop

It can be tempting to answer emails at any time of the day, especially if you are engaging in an online support function. However, for your own best interest, take time to step back and disconnect. You don't want to get burnt out answering emails all day long because it will show in your interactions with the customer. You need time to relax in order to begin each day with a fresh start.

Extra: Throw In A Bonus, If You Can!

It is always a good idea to go the extra mile, and show some love to your customers. For instance, when someone pre-pays for 12 months at once, throw in the 13th month free as a surprise. Your customers will love it!

Customer Success as a Growth Hacking Strategy

Focus on CHURN REDUCTION and RETENTION as much as acquisition

Customer Lifetime Value (CLTV)

Leveraging Customer Advocacy

Customer Loyalty

Upsell / Cross-sell Opportunities

“Experts suggest requesting testimonials and feedback from successful customers to get the most from their advocacy.”

Applying Customer Success

Developing a Customer Success Strategy

Who is Your target market?

Who is the target group of the Sales Team?

Who are they having the most success selling to?

Define the desired outcome for each of your products, separated by customer segment.

Note that **success milestones** that map out the customer's path towards their desired outcome.

Record the **level of engagement** required on your side to help them reach each Success Milestone.

Tailor plans for each **customer segment** & **product**

Create a **plan** of time, data, and/or event-based actions for the different stages within a customer lifecycle.

Step 1: Find Out How to Solve Customers' User Adoption & ROI Problems

Get your initial needs analysis for your customers right!

User Behavior

Be aware of all the drivers and barriers that affect user adoption within your customer's organization.

Why is your system not utilized by the staff and why are your customers not achieving their goals?

Identifying root causes is critical.

Methodology

Find out the methodology used by your customers to introduce your system, and the way they manage ongoing user adoption.

You will probably find that user adoption and ROI problems are management issues, not user-resistance.

Analysis Skills and Perspective

Take note of the problem you need to address, and determine whether it is an organizational change, CS related performance issue, or rather a technical, sales, or Customer Service issue.

While conducting the analysis, having someone with the expertise and proven track record of driving & sustaining user adoption and organizational change is ideal.

Step 2: Develop Your Customer Success Management Strategy

Do You Have A Successful CSM Function?

How can your customers actually solve their problems?

Which helpful resources can you provide?

Self Service

VS.

Personalized Services

Video, Text, or Visuals

Lower in cost but lower in effectiveness as well.

For lower value customers - Develop basic toolkits to build up their internal user adoption and ROI programs.

Build, Buy or Partner

Build - If you want to develop internal user adoption and ROI expertise within your company.

Buy - If you want to bring in expertise when needed

Partner- If you want to maintain focus on the technical expertise in the company, while ensuring your customers are receiving the required service to sustain ROI long term.

The Customer Success Journey

Customer Acquisition

Your customer acquisition strategy is critical to account maintenance, expansion, and renewal. Effort from the Product Management, Engineering, and CSM sides in order to meet customer expectations can be reduced by having unique use conditions that only call on those teams when necessary.

However, time and resources can be wasted if there is too much interfacing between teams, which can hamper the CSM team's progress. Having a collaborative relationship between Customer Success and Sales is more helpful in avoiding customers with misaligned needs that result in a poor fit.

User Onboarding

Onboarding is the first step in familiarizing the customer with your product, and allows them to start seeing value from its use. It is important to identify risks early, and address them as soon as possible to get your user started on a positive note. Consider the following for your ongoing risk assessment:

- ***What is the customer executive sponsor status, and engagement levels of the department leadership?***
- ***What are the plans for project governance, employee engagement, and change management?***
- ***What are the plans for your business process redesign? How do you keep track of progress?***
- ***When are the dates scheduled for onboarding training? What are the target dates for the customer journey?***
- ***How is the management of initial support issues handled? Who owns the process from start to finish?***

In a high-touch model, onboarding is handled through a personal interaction between the CSM and customer. In a high volume environment, technology is used to create content, reusable templates, and clickable walkthroughs. Webinars and automated emailing tools help manage customer interactions and engagement while CSMs deal with exceptions such as low levels of adoption. To manage onboarding at scale, a CS software platform should be implemented if it is able to track usage data and automatically trigger alerts.

Product Adoption

In order to maximize customer value, it is crucial to expand the number of active users, and increase the feature usage of your product. Support engineers can advise on effective product usages, marketers can promote training resources, and product teams can make sure in-app notifications drive feature usage known to raise adoption. Apart from consumption metrics, identify relationships between feature adoption and Net Promoter Scores. This lets you emphasize the features that unlock value and lead to renewal. Identifying and empowering a good executive sponsor will also encourage the re-engineering of business processes that will kickstart adoption, e.g. using your product's new dashboards instead of their old spreadsheets.

Account Expansion

Upon successful onboarding and adoption with full license and feature usage, an increase in revenue opportunities can follow. In order to hit your milestones, take the opportunity to seek advocacy in the form of expansion. Ideal goals include upselling more licenses and consulting services, or cross-selling to another department. By sharing real-world use cases, you can also inspire your customer to pursue new opportunities. Peer-to-peer engagements, comparisons, and discussions can be an effective Customer Success tactic.

Subscription Renewal

Subscription renewal is the ultimate goal of Customer Success. Options for early renewal, with quotes issued well in advance, should be included with time allocated for any last minutes changes or negotiations. Customers with full license utilization and high feature usage are excellent candidates for upsells during the renewal process. Conversely, accounts with unused seats and low utilization could represent a significant challenge, just for renewal, so offer incentives, and make sure to ask what would make the difference between a yes and no.

Additional risk factors might include:

- ***Change in customer use conditions or trends***
- ***Change in any key customer contacts***
- ***Technical issues with the application, installation or configuration***
- ***High incidence of support tickets or escalations. A high number of tickets may actually be positive if managed well. A large number of outstanding tickets is a risk factor.***
- ***Low NPS or CSAT scores***

Having a clear view of the customer's definition of success, a mutually agreed success plan, and a process to execute at scale puts your CSM team on a path that is very likely to yield positive results.

Customer Success Processes

New Deal Review

Identify and mitigate potential risk before a customer officially comes onboard.

Executive Sponsor Program

Match executives on your side to executives on their side.
This is especially helpful in driving the advocacy of the organization, as well as resolving escalated issues.

Strategic Account Review

This practice drives visibility of your most important customers.
Account teams (sales & post-sales) brief staff on account progress and the SWOT analyses.

Red Accounts

With the RAs, you drive visibility, accountability, and resolution of escalated accounts.
This includes clearly defined escalation paths, and weekly status meetings to review progress.

Renewal & Churn Forecasts

This includes a weekly review of the renewal and churn forecasts, as well as an analysis of churn drivers.
Churn analysis should include the entire staff, and a plan to mitigate further issues.

Auto Renewal

Streamline the renewal process with this policy in each contract.
Include renewal notifications (30 and 60 day notifications), renewal confirmations, and cancellation processes via auto renewal systems.

One-to-Many

This allows you to manage many customers easily.
O2M provides an opportunity to partner with the marketing team and plan how to drive adoption and customer love at scale.

Scoring Customer Health

Defining "Customer Health"

1. ***Can the score be used as a prediction of renewal/churn? Should it be?***
2. ***What is the frequency of fluctuation (RED one day, Green the next)?***
3. ***Which values are taken into account? Is it quantifiable, or qualitative?***
4. ***What are the various elements that make up the overall score?***
5. ***Should any of those elements be subjective, or do they all need to be objective and concrete?***
6. ***Are all the elements equally important? How do you change weightage allocations?***

The above questions are some of the important aspects to think about when constructing your Customer Health formula. Throughout the process, this list of questions will expand to include additional criteria you would like to emphasize.

Customer Health Inputs

- Product usage
- Depth of usage - % of product used
- Breadth of usage - # of licenses
- Usage of the stickiest features of your product
- Growth of the account in terms of revenue or licenses
- Customer lifetime
- # of renewals completed
- # of upsells completed
- How often do they call support?
- % of spend that is non-recurring
- # of Support tickets
- Potential Churn level
- Discount level
- Survey results (NPS, CSAT etc.)
- Marketing participation – references, case studies, speaking engagements
- Product feedback
- Community involvement
- Invoice history
- Length of time between end of onboarding & first renewal (for new customers)
- Executive relationship
- Overall relationship
- Are C-level execs users of your solution?

There are so many factors that affect overall customer health, so much so that the list above will never be complete. The challenge is to narrow down the list to a manageable number that is helpful, lending itself to be possible to track and implement. If a metric is untrackable, then there is no use in including it in your health algorithm. Once you automate the data collection, you can expand the number of elements to include more automated ones, and fewer subjective & manual criteria.

How many Customer Health Models are needed?

You will probably want to have more than one scoring model, to account for various external factors.

You may find yourself asking: Should I have a different model for customers in the first quarter and those who are more than a year old? Should I score my high-touch, strategic customers differently than the no-touch, self-service customers?

There is no need to worry about these specifications right now; these are refinements that can be completed at a later date, once you have built the foundation.

When recurring revenue becomes larger than new business sales, the requirement for more accurate renewal forecasts will increase greatly. At this stage in the business, it would be expected that the renewal forecast should be significantly more accurate than the new business forecast.

This is the time to break down health models for each segment, and use more specific criteria for each group. Timely and accurate health scores by account will drive accuracy into your renewal forecast, and allow you to easily prioritize the activities of your Customer Success and/or Account Management teams.

Since these are valuable resources, prioritizing them and making them more effective has tremendous value to the enterprise.

Using Customer Success Automation

TRACK USER BEHAVIOR

- Understand the areas of the Saas application that are frequently used together, as well the areas that users struggle with, to determine their propensity to buy or upgrade
- Identify usage patterns that indicate the customer is receiving limited value that correlates with a high likelihood of churn.
- Use Big Data techniques to process large amounts of usage data, and correlate the behaviors with sales opportunities and revenue risks for specific user base segments

ANALYZE & SCORE

- Likelihood of purchase
- Likelihood of success of trial use
- Likelihood of conversion from free to paid
- Likelihood of upgrade potential
- Likelihood of churn
- Likelihood of recommendation to others
- Likelihood of success in using the product
- Measure of influence within company
- Measure of influence outside of company
- Potential connections and contacts

MESSAGE

- "In-app" messaging - provides help right in the product interface
- Direct "chat" with a company representative
- An invitation to webinar or company event
- An email giving recommendations for use of the product or additional product information
- Support widgets, inline polls, and NPS Surveys located within the product
- Video tours and click through navigation

ACTION

- Actions can trigger the company's sales and support teams through the Customer Success/CRM system which can serve as a central repository for the customer data.
- Automated customer data collection by a Customer Data Platform that records insight in real time of customer and prospect behavior.
- Sales Force Automation and Customer Service systems will initiate sales or customer actions based on the information collected from the prior steps in the cycle.
- The sales and support teams will be well informed of the successes and issues the customers have by gathering intelligence on their actions and the automated steps already administered by the system.

Customer Success & Predictive Analytics

How do we use analytics and behavioral data to predict customer frustration in the future, and prevent it before it happens? The following steps help you connect your data to your Customer Success.

STEP 1: TRACK PRODUCT VALUE METRICS

- Understand what defines a success customer & the group of customers that most benefit from the product.

- How did your customer KPIs improve thanks to your efforts?

- Start measuring the value of your customers gained from your product.

STEP 2: TRACK EACH PART OF YOUR COMMUNICATION WITH THE CUSTOMER

- Map the different channels.

- Record the purpose of the communication, interaction level, and outcome.

- Customer relations and communication over time is a key factor in creating a happy customer who gains from use of the product.

STEP 3:
CREATE A CUSTOMER SCORE

The Customer Score should reflect a function of:

- Customer Communication
- Product value
- Activity level within your product

The score will be the number you will work with to measure the customer's success.

STEP 4:
TRACK CUSTOMER CHURN DATA & RECORD IT WITH CUSTOMER SCORE

- Connecting churn data to 'Customer Score' adds relativity to the measurement.

- Overtime, build up a long list of customer scores with flags that indicate whether they are still using your service.

- For those who left, conduct an analysis of their customer journey and review their scores at each key juncture.

STEP 5:
REFRESH YOUR STATISTICAL SKILLS

- Calculate the factors of each action/event that caused your customer to churn.

- Note that the result is a probability.

- As your product evolves, add new parameters as they become relevant. These new parameters will affect the score of your new customers relative to the older ones who did not use the features that the new parameter represents

- By predicting churn, develop a system of alerts that are triggered when customer activity follows a negative trend. Actions can be set in the alert system to trigger emails, change the platform messages, and launch a retention campaign.

Customer Success Reviews

What is a Quarterly Business Review (QBR)?

A QBR is a simple and powerful process for any company, during which past activities are reviewed to guide future planning and forecasting.

The key to an effective QBR is that the executive team must conduct it with full transparency, with the intention of assessing past successes and unmet goals, in order to plan for the efficacy of future efforts.

But first, what exactly is a QBR and how should existing business teams think about this practice? QBRs can be done in an in-house CS teams context, as well as between a CSM and customer.

According to Steven Rosen, Executive Coach, "A quarterly business review consists of a formal review meeting between a front line manager and one of his/her sales representatives. The purpose of such a meeting is to review the last quarter's performance and to discuss plans for the next quarter."

QBRs are regular, scheduled reviews of the Customer Success efforts over the past quarter with managers, as well as clients, and generate strategies on customer renewals, how to move through upcoming challenges, and discuss what worked in the previous quarter.

In Every QBR, You Should:

- Establish "checks and balances"

- Build up processes to ensure existing customer revenue and growth are met

- Discuss previous goals, including successes and failures

- Plan for the next quarter, including goals to meet & key metrics

1 MAKE THE PROCESS ESTABLISHED, EASY AND EFFICIENT

Create set steps for what is expected from each participant of the QBR - for those leading the Customer Success QBR, as well as those giving feedback/requests.

Who are the expected attendees? What are their respective roles? (Leader, Presenter, Moderator, Note taker, etc.)

What is the format of the Customer Success QBR, and which tools will be utilized?

What is the QBR agenda? How long should each topic be addressed? (An ideal duration of a QBR should not exceed 3 hours)

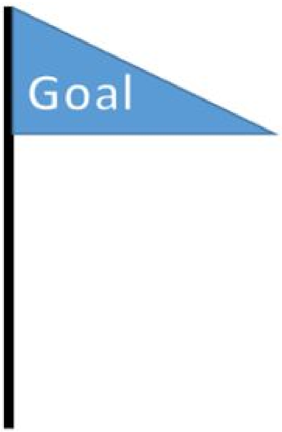
Which materials should be prepared beforehand? Which reports will be needed?

What numbers/metrics should be analyzed? (Focus on the previous quarter, but also next year.)

Is there a presentation involved? If so, are slides needed? Will a template be provided?

2

ALL LEVELS OF THE CUSTOMER SUCCESS DEPARTMENT SHOULD PARTICIPATE



- Review and make sure business on track
- Be prepared with an action plan to address the challenges and the opportunities in the territory/business.
- Everyone should be fully aligned with the plan of action for the next quarter.

Executives to Customer Success Managers (CSM)

All individuals should be involved in the Customer Success QBR process, as everyone will play a part in focusing on retention and customer relationship growth.

It’s important to structure these reviews from the top down, with the highest executive leading their reportees through the process. This allows the customers to see the progress and direction coming from the top.

3

STICK TO A DEFINED PROCESS

"Never skip the process."

Even if the quarter or year went exceptionally well, the Customer Success QBR time is a good time to reflect on what made it so successful,and how to keep improving.

QBR Outcomes

4

APPLY PAST LEARNING FOR FUTURE SUCCESS

Review successes and misses from the prior quarter, and what was learned.

Create a plan for the upcoming quarter.

Keep track of **performance metrics** each quarter.

Plan key **actions** to be taken.

Conduct a **review** before the quarter ends to prepare & assess progress.

5 DOCUMENT THE QBR AND IMPLEMENT THE NECESSARY CHANGES

Customer Success Best Practices

1. Segment Your Customers

Segmentation is one of the key CS best practices, as it helps to determine which Customer Success model you should implement, and the types of actions that should be taken for each of your customers. A failure to segment results in an inefficient and ineffective Customer Success team, leading to poor customer experience.

Start by defining the services that you want your Customer Success team to perform. Associate a value to each of those services, and then assign the offerings to be provided to each segment, based upon value and ROI of your own efforts.

2. An Early Warning System

An Early Warning System is an instrumental Customer Success best practice. It enables your teams to set up preventive measures, and apply any corrective measures to prevent problems before they spiral into major issues.

Even if your company does not have the resources to invest in a Customer Success solution, an Early Warning System can be created manually in a spreadsheet. While the manual version will not be as robust as a full-fledged system, and will require consistent updating, monitoring key highlighted issues will go a long way in the early stages of your Customer Success efforts.

3. Process, Process, Process

Processes are critical in any Customer Success interaction. Customer Success leaders should implement processes to manage common account situations. These include processes for onboarding, training, escalations, business reviews, renewals, and upsells / cross-sells. It is also beneficial to set up programs for customer advocacy, lifecycle marketing, and Early Warnings.

At an early stage, it is advisable to prioritize development of streamlined processes for escalations, renewals and business renewals/upsell. These processes should also be somewhat transparent to the customer, so that you can manage their expectations during each part of the phase. As you scale, all of these processes can be automated with the help of Customer Success playbooks.

4. Business Reviews

Though business reviews are often not prioritized or omitted when teams are going through busy periods, it is important to utilize QBRs as a Customer Success best practice. Deprioritizing business reviews leaves money on the table, and does not solidify adoption with your users. If progress isn't reviewed and best practices optimized, you cannot capitalize on gains made.

A QBR should be conducted to look at the customer's KPIs and apply metrics to show that business goals are being achieved. If you are not monitoring your customer's goals and conveying the successful results back to them, it is tough to expect the customer to renew or expand.

5. Executive Buy-In

If the executive leadership / management team has not bought into Customer Success, it is nearly impossible for the company to deliver world-class Customer Success. If you are considering a position as leader, find out from your potential CEO or Board of Directors about how committed they are to the Customer Success mindset, and how this materializes in alignment of company goals around Customer Success.

Support of C-class executives is key in funding your budding Customer Success efforts because without their support, there will be more established functions vying for extra cash flow. Get them on your side by demonstrating value early on, and you'll always have backing.

Building a Customer Success Team

Selling the Customer Success Vision to Your Management

ROI from hiring a Customer Success Operations professional

=

ROI from hiring a Sales Operations professional

What happens when you hire a Customer Success Manager?

Productivity of your customer-facing team members

Need to hire more people

We build more value faster for the customer's company and our own – And we can prove it.

- Mikael Blaisdell

CS Adoption Trends

10% of Fortune 500 companies

22% of Fortune 100 companies

Past 5 years

Number of companies with a single executive leading Customer Experience efforts across a business unit or an entire company.

8% Chief Experience Officer

23% Chief Client Officer

44% Chief Customer Officer

Rise of Chief Customer Officer (CCO)

CCO - An executive who develops both corporate and customer strategy at top company levels with the aim to maximize customer retention, acquisition, and profitability, as well as provide authoritative and comprehensive views of the customers.

The role of a CCO is all about customer engagement. This includes listening to their feedback, creating enhancing customer experiences, earning their trust, and advocating on their behalf. Although many of these are existing functions owned by different teams, the CCO role unites all these functions to improve productivity, and deliver an improved customer experience.

The CCO makes sure the customers' voice is heard on the executive management team. They hold influencing power over decisions involving spending of resources, and how the company prioritizes development of the product and service.

"Our operations departments were focused on our products and services, our finance teams on collecting payments, and our sales and business development teams on meeting short-term revenue goals. No one was looking at things from the customers' holistic perspective. We knew we needed to change our culture to better serve the one reason we all exist — our customers."

- Marc Stigter, Cary Cooper

Samples of Customer Success Roles & Responsibilities

Customer Success Executive

Acts as the frontline of the company. A problem solver as well as active pursuer of leads and existing customers to discover their challenges. You will be given an opportunity to learn the ins-and-outs of the software and will be able to answer in-depth questions.

Responsibilities:

- Identify the technical root cause of issues faced by clients with our product and assist in resolution
- Be an information source for customers to find out about the company product, handle inquiries, deal with customer complaints, and provide solutions
- Liaise with other departments when necessary;
- Provide excellent and timely customer support to users
- Follow the Quality Assurance procedures and other relevant work processes as well as contribute to their improvement
- Ensure customers achieve their adoption and success targets
- Create and manage a custom plan for each customer

Customer Success Manager

You should possess the best customer management and business consultancy skills. Having a strong passion for customer engagement and expansion of customer use cases, you have impeccable relational skills and can create a win/win environment for everyone.

Responsibilities:

- Own overall relationship with assigned clients, which includes: increasing adoption, ensuring retention, and maxing satisfaction.
- Establish a trusted/strategic advisor relationship with each assigned client, and drive continued value of our products and services.
- Develop, prepare, and nurture customers for advocacy.
- Work with clients to establish critical goals, or other key performance indicators and aid the customer in achieving their goals.
- Work to identify and/or develop upsell opportunities.
- Advocate customer needs/issues cross-departmentally.
- Manage programmatic account escalations

Customer Success Vice President

A senior executive to own driving success for our customers. This role includes responsibilities for all Customer Success activities (e.g., onboarding, services, support, advocacy, adoption, retention) and outcomes (e.g. renewals, upsell, cross-sell etc.).

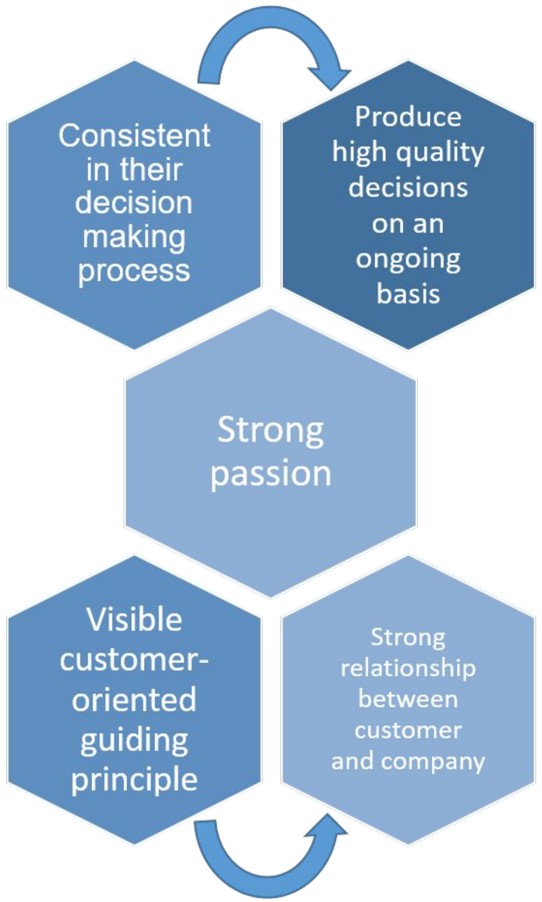
Responsibilities:

- Driving Customer Success outcomes
- Defining and optimizing customer lifecycles
- Managing Customer Success activities
- Measuring effectiveness of Customer Success
- Enhancing effectiveness and efficiency through technology
- Leading world-class Customer Success team
- Inspiring a Customer Success atmosphere throughout Company
- Ensuring optimum account performance and smooth business processes
- Developing and implementing an effective strategic account plan through collaboration with other team members

Qualities of a Winning Customer Success Team

"The most successful CSMs are those who internalize the notion of Customer Success, and use it as their guiding principle."

- Boaz Maor



A Winning Customer Success Team

Tips to Improve the Value Your Customer Success Team Delivers

Define Customer Success Responsibilities

Customer Success Management

≠

Professional Services / Customer Service / Technical Support

Focus on Long-Term Value Instead of Immediate Opportunity

\- Primary Focus -

Maximizing Customer Value In Every Customer Interaction, Including Email, Phone, In-person, and In-App

Be Proactive & Create Opportunities for Customer Engagement

Ad-Hoc Interactions

Impromptu phone calls, email, or on-site engagement whenever issues arise

Bi-Weekly Calls

CSM - Customer interactions with discussions on user experience, product issues, and enhancement suggestions

Quarterly Business Reviews

Meetings involving various teams to elevate product discussions beyond the day-to-day technical issues, and determine priorities for coming quarter

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