5 Pillars for Evangelizing Customer Success

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Customer Success Style

Setting the Stage

What is CS Evangelism?

"It's the zealous advocacy for a cause"

With the goal of creating change

For many, it means changing how your company thinks about what customer success is (and is not). It means getting people to view it, not as a division, but as a company value and philosophy.

It requires creating a cultural shift in our company; a change in how we work: classic change management.

Company "Houses"

HEAR ME ROAR

HOUSE **SALES**

Sales Strength
- Known Entity for driving business
- Easily Measurable (hit the number or you don't)
- Loudest & Heard (in most companies)

Sales Weakness
- Incentivized (typically) by quota
- Don't manage (typically) post sales relationships
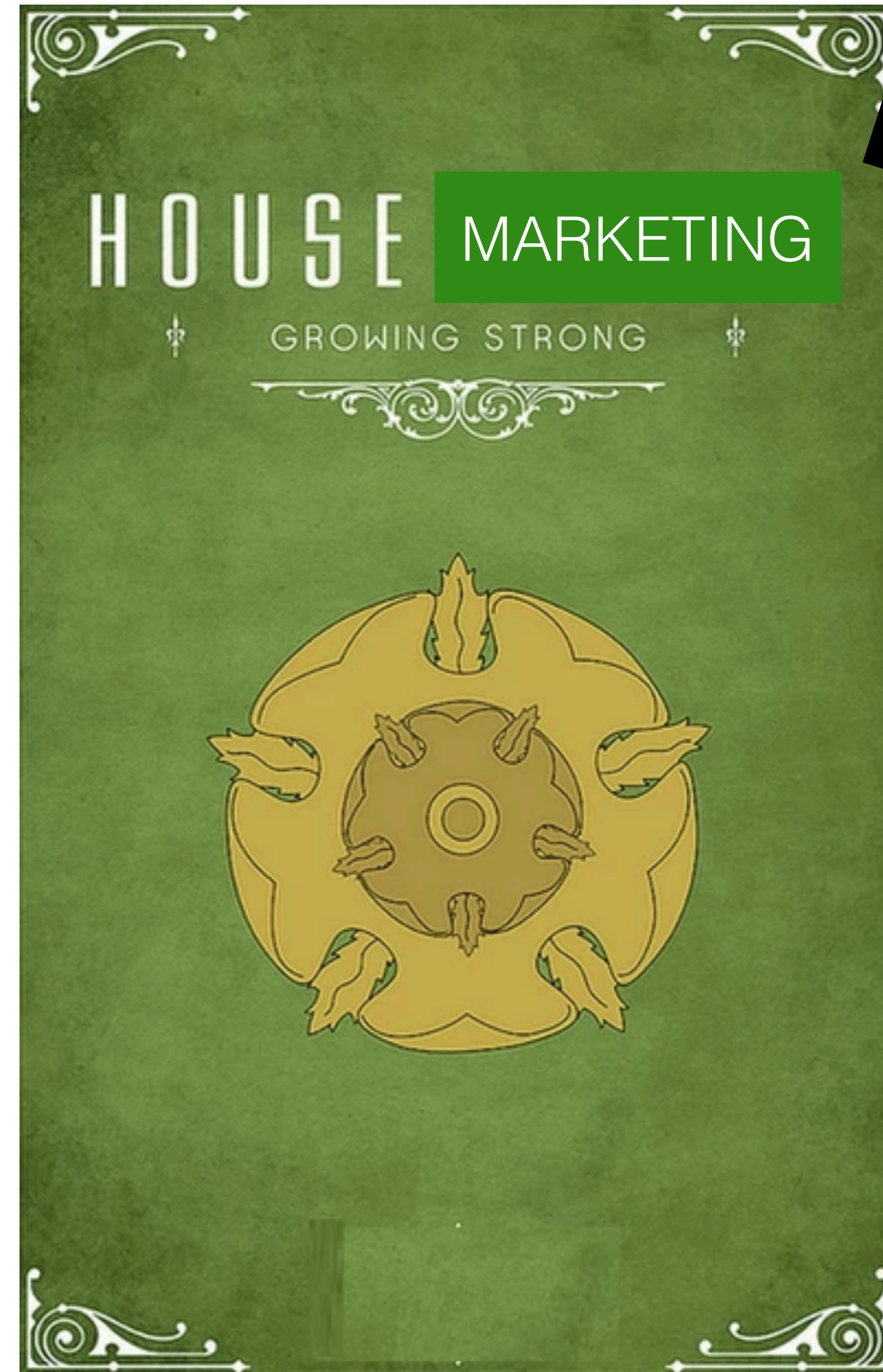- Care only about the new business generation

Marketing Strength
- Measurable
- Drives awareness and brand
- Supports the Sales pipeline

Marketing Weakness
- Typically tied to only NEW business generation (and pipeline generation)
- Don't necessarily have resources for current customer communications and growth

HOUSE
Engineering
OURS IS THE FURY

Engineering Strength
- Build the product
- Improve underlying infrastructure
- Help with bug blasting

Engineering Weakness
- If too many bugs released, a bad experience for customers
- Often have to react to "key" customer feedback (build new things, etc. when customer expectations aren't met)
- High $$$ for reactivity & de-prioritization of NEW features/innovation
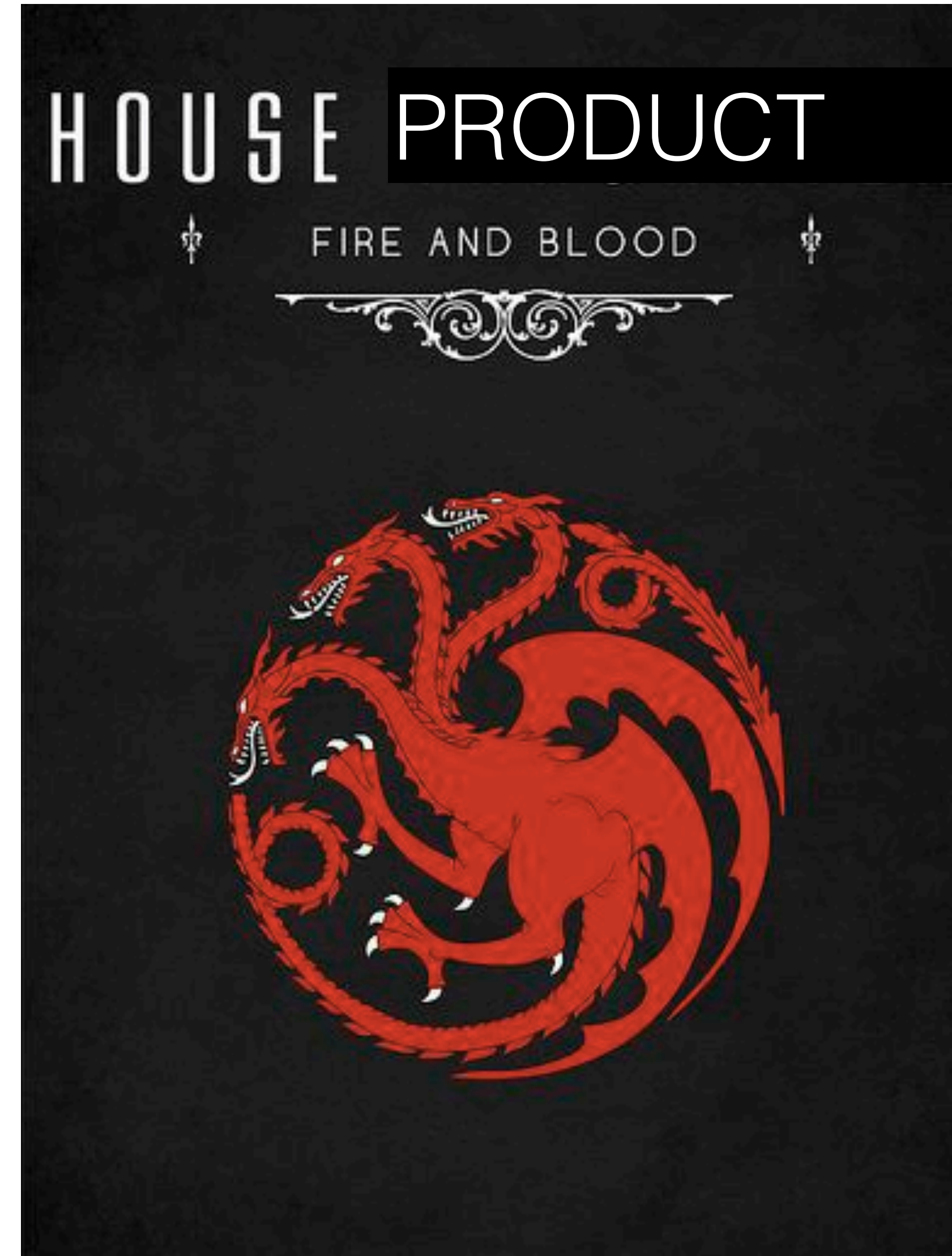
Product Strength
- Innovate on the "solution" to customer problems (i.e. design the product)
- Design new features and capabilities and usability
- Build for customers

Product Weakness
- Major gaps in the product (i.e. doesn't solve problems for customers), if they don't listen to customers
- Will react (if told by Sales) to building new features for $$ (which is NOT strategic)
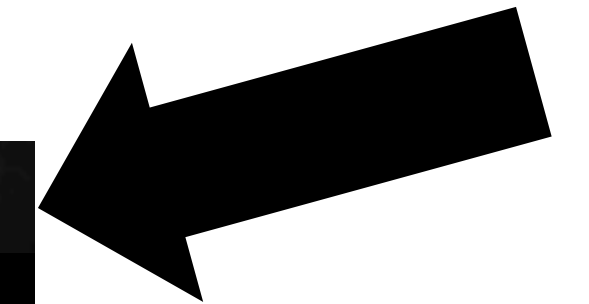
CS Strengths
- Drive value for customers
- Set expectations when needed
- Build and strengthen relationships which drives retention and growth
- Potential to rally the company around the customer

CS Weakness
- Relatively unknown (board, c-level)
- Thought of as a cost center, not a revenue driver
- Typically forced to react when departments aren't aligned

Budget

Power

Attention

People

Meanwhile…as the battle rages

Churned Customers

Heading to the Competition

Poor reviews

Negative feedback

sales

marketing

engineering

CUSTOMER SUCCESS

product

Customer Success is not a "house" or a division of an organization.

It's a COMPANY VALUE, and the only way to prevent "white walkers" (churn of customers, negative reviews, switching to the competition, etc.), is aligning all divisions and making sure they work together.
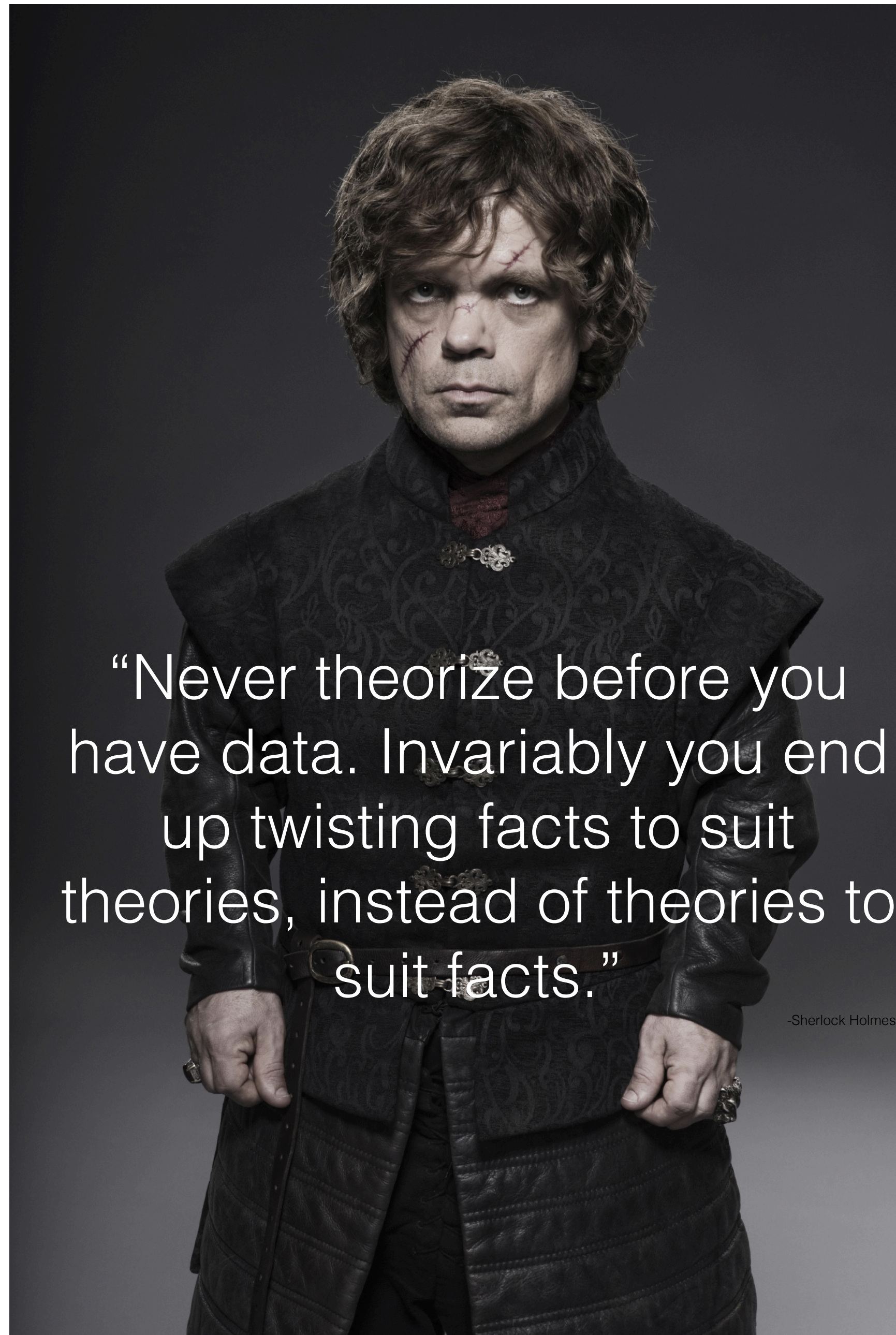
And this is your arsenal for how to evangelize CS internally…

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Data, Data, Data

Data, Data, Data

- Get into the weeds, and analyze what's going on with your customers

- Do you have churn reasons/buckets? If not, create them!

- Do you have segments? Create them too!

- Know your customers and the reasons behind churn and growth better than ANYONE else.

"Never theorize before you have data. Invariably you end up twisting facts to suit theories, instead of theories to suit facts."
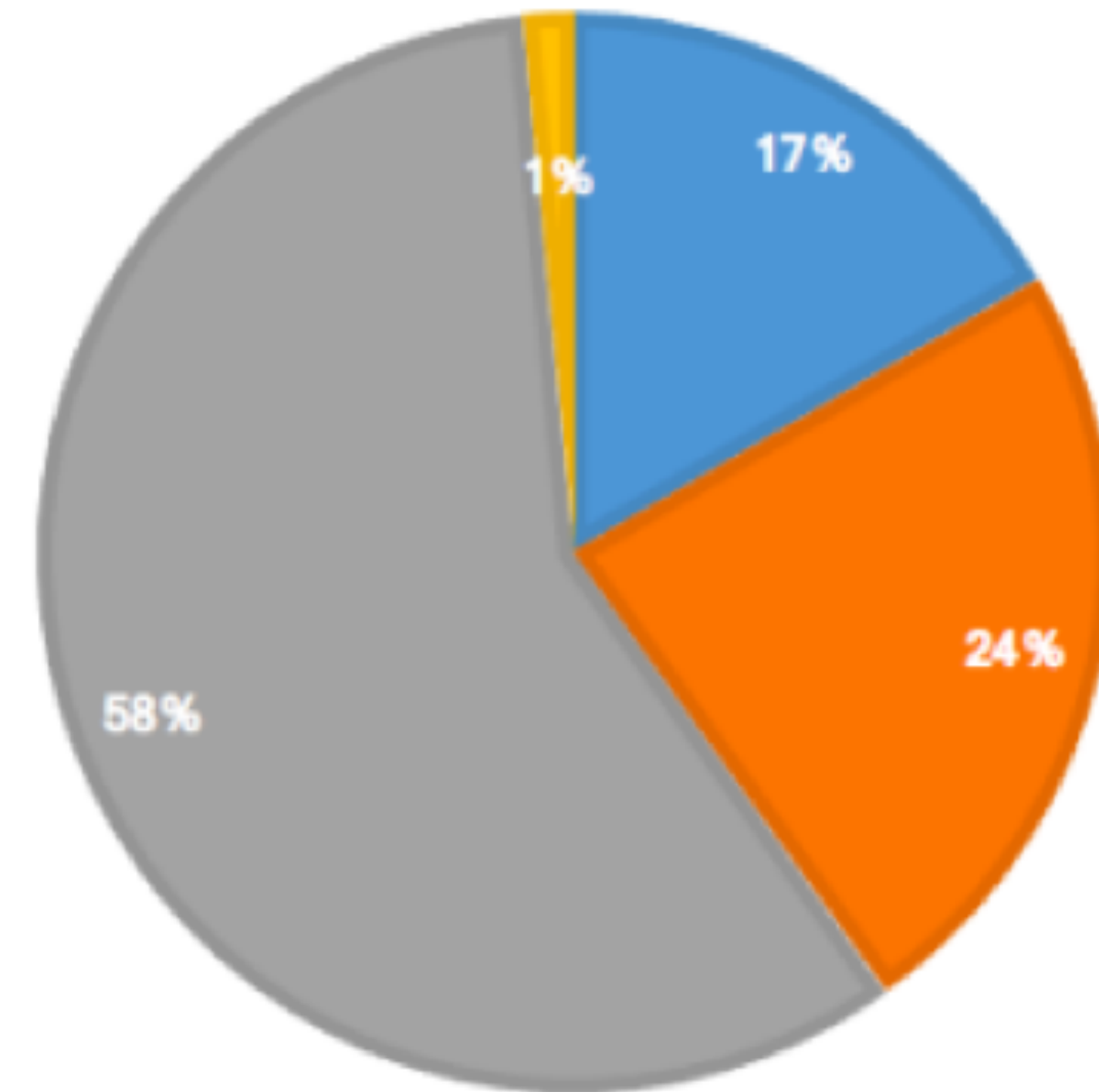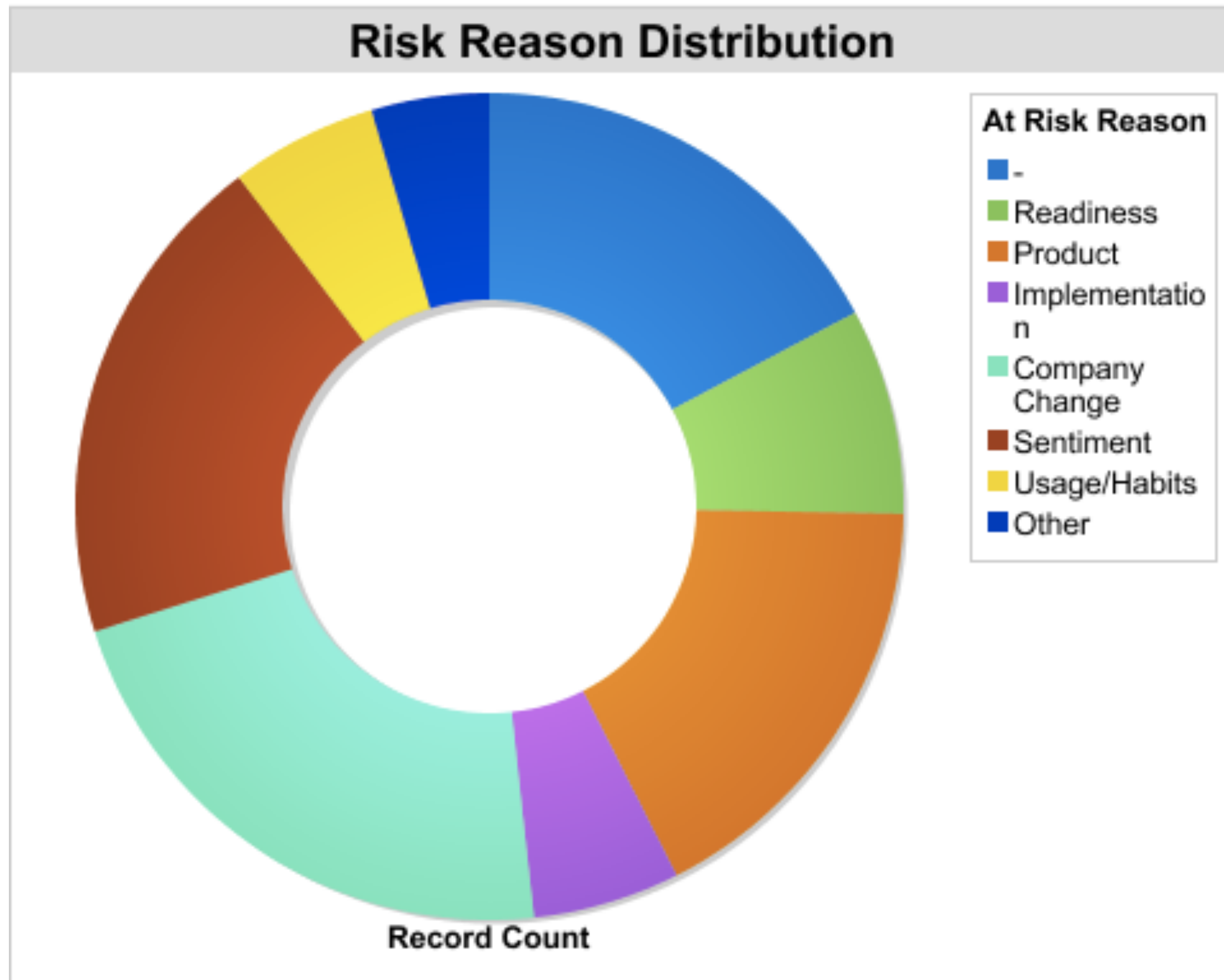
-Sherlock Holmes

Segmentation

- Agency

- Enterprise

- Partner Agency

- All Others/Corporate

MRR DISTRIBUTION BY SEGMENT

Legend: Agency | All Others | Enterprise | Partner Agency

Pie chart: 17% Agency, 24% All Others, 58% Enterprise, 1% Partner Agency

Churn Reasons

- Sales

- Product

- Engineering

- Customer Success

- Natural

Clear, Concise, Impactful Story

"If you can't explain it simply, you don't understand it well enough."

Albert Einstein

Clear, Concise, Impactful Stories

- With your data, build your story!

- Create clear and concise talking points based on the data and your stakeholder.

- Have a story that backs up these talking points for creating impact

We have an issue with House Sales

Problem

- 34% of classified churn was due to poor sales issues

- This equates to 5% of all churn in 2016

- Of the 34% classified sales issues, 74% was due to poor product fit

Practical Storytelling Practice

There are 2 ways to communicate knowledge: You can PUSH information out or you can PULL them in with a story.
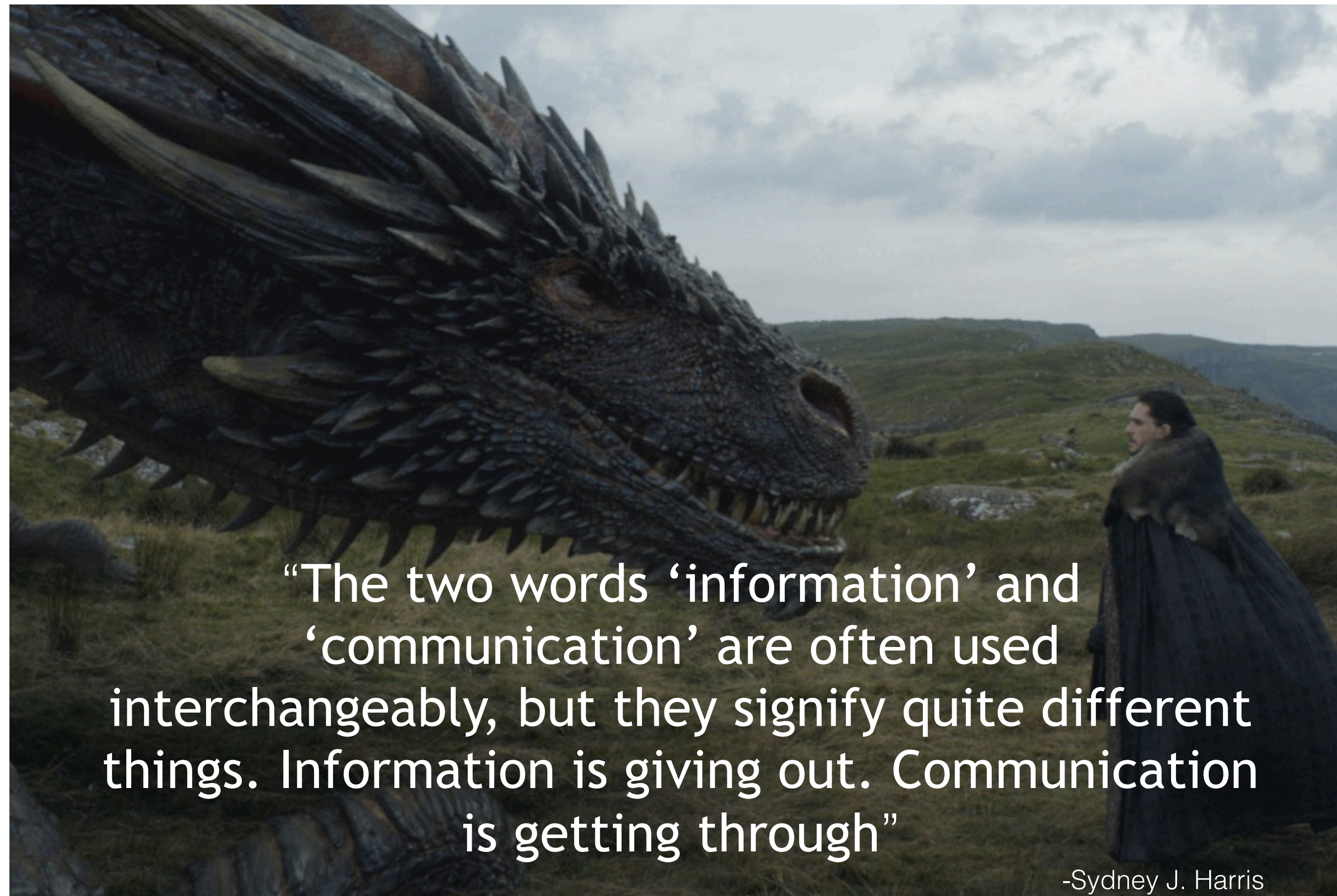
- We sold to Customer X in July

- Three weeks later, the Customer was at risk; the customer said they felt like they were oversold!

- Despite best efforts – travel, training, proactive support, the customer churned!

- This Customer accounted for 19% of all Sales churn.

Communicate

Use Every Single Interaction with Every Single Person to Communicate

"The two words 'information' and 'communication' are often used interchangeably, but they signify quite different things. Information is giving out. Communication is getting through"

-Sydney J. Harris

- Anytime, Anywhere, Always be ready with your story.

- This story needs to be tailored to your audience.

- Be relentless and don't stop until you get through!

Solution Oriented

Solution Oriented

- Come up with suggestions that could work to solve the issue

- Be open to a conversation and discussion about the plan- you may not get everything you want

- Find a mutual plan and way forward

- Write it down and communicate it to all stakeholders

"Complaining about a problem without proposing a solution is called WHINING"
Theodore Roosevelt

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- 34% of classified churn was due to poor sales issues

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Solution

- Better Sales training to make sure we sell to the right customer (Mid-Long Term)

- Incentivize sales to sell to best-fit customers

- Allow CS to say NO to poor deals

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Execute & Start Again

Execute

- Now it's time to execute

- If everyone is on the same page, ACT; just do it!

- Mobilize for the quick wins today and build project plans for longer term solutions

- Get the Data and Start Again!

"Talk is Cheap. Just Do IT"

-Nike

Start the Cycle Again

- Data, Data, Data

- Clear, Concise, Impactful Story

- Use Every Single Interaction with Every Single person to Communicate

- Solution Oriented

- Execute & Start Again

The End Result...

Instead of everyone fighting over this…   We Rally the Entire Company
around Preventing…

And driving toward….

Take Away

Customer Success is not a division of an organization.
It's a COMPANY VALUE, and the only way to prevent "white walkers" (churn of customers, negative reviews, switching to the competition, etc.), is aligning all divisions and making sure they work together, putting the customer at the center of everything.

Data, Data, Data	Clear, Concise, Impactful Story	Use every interaction to Communicate	Solution Oriented	Execute and Start Again
• Dig into your data • • Call customers to find out why they churn or grow • • Segment your customers • Look at your data sets and analyze what's going on • • Classify the data • • Get classifications into Salesforce, Excel or CS platform • • Make sure these classifications are GLOBAL across the company	• Create clear, concise and impactful talking points regarding the data • • Know what the data is telling you and have stories to back it up • • Tailor your stories to your stakeholders • Examples: • Too many bugs (Engineering) • Overselling (Sales) • Poor design of a feature (Product) • Not trained properly (Customer Success)	• Use every interaction with every single person to communicate what's going on • • Tell everyone the story most relevant to them • • Ask for their feedback; do they know their department contributes to churn or growth?	• Have a solution for solving the problem • • Be open to dialogue about the solution • • Be ready to compromise • • Have metrics in place to measure the solution • Example: • Overselling- better sales training • Too many bugs- better testing practices before release • Product doesn't solve workflow- regular customer interactions (product advisory boards) • Not Trained – onboarding program	• Once all stakeholders are on the same page with a solution and clear process changes in place, it's time to ACT • • Break up new tasks or projects to solve issues into short, mid, long term buckets and start to execute • • Measure your progress and churn and start again! • *CS is living and breathing and won't stop, so neither can your diligence of following these practices!*