

CUSTOMER
SUCCESS
as a culture

CUSTOMER SUCCESS
LEADERS
EDITION

Content

Introduction	3
Dave Duke	4
Chrisy Woll	8
Jackie Golden	14
Ursula Llabres	19
Todd Williams	24
Andrew Wise	28
Alex Timlin	32

Dear Reader,

Perhaps more than any other function, Customer Success teams have gone through abundant growth and change over the past few years. Because of this intense focus on the customer and new ways of capturing SaaS metrics, ClientSuccess interviewed 7 Customer Success leaders across the industry who are leading the teams that are at the forefront of these changes. In this ebook, each leader addresses a series of tactical, in-the-weeds topics that are incredibly relevant to Customer Success leaders today, including:

- Hiring and interview questions
- Scaling Customer Success teams
- Effectively training new CSMs
- Determining salaries and quotas
- Evaluating tools to support their CSMs
- Getting support from the entire company
- Building a company culture around Customer Success
- Vocalizing customer concerns with executives

We believe that over the next few years, many more thought leaders will emerge and join these leaders in answering these important questions. It's our hope that this ebook will foster ideas, innovation and evolution that will help transform how companies truly put Customer Success at the center of their business.

Best,

Dave Blake
CEO, ClientSuccess
dave@clientsuccess.com

**One of the more strategic things
you can do is to anticipate the
needs of your team**



Dave Duke

VP, Customer Success

Sigstr

As VP, Customer Success, Dave is fully involved with every customer interaction. Their team and their customer base are growing rapidly, so Dave constantly thinks about company culture, customer churn, scaling the team, and how to determine the most important metrics.

Sigstr powers smart marketing through email signatures. Its SaaS product drives brand compliance and unlocks the marketing potential of employee email signatures. With Sigstr, every employee email includes a consistently branded email signature, and marketers can easily update signature campaigns to drive awareness and engagement for key events, case studies, product updates, news, and job opportunities.

How do you effectively train and scale your team? What are the keys?

“It terms of training, I think one of the more strategic things you can do is to anticipate the needs of your team,” explained Dave. “Leaders must always be listening to their direct reports, customers and other team members throughout the organization so they can be in tune with the strengths and weaknesses of the business. The majority of customer interactions are reliant on internal and external knowledge sharing, so it is critical that training the team for these interactions be a priority.” Dave explains they accomplish this, “... through exercises such as role playing, ongoing support case review, and customer feedback discussion. Development of employees must be a consistent and planned list of activities. Creating and fulfilling a training and development calendar will keep your team’s skills sharp.”

“As for scaling a team, effective customer coaching, empowering team members to make decisions, leveraging a knowledge base regularly and utilizing application data to automate communication when possible, are four strategies that can produce longstanding results,” said Dave.

How do you get support from the entire company?

Sigstr is still a small company with 15 employees, so they work closely with all departments. Dave explained that communication between the Customer Success and Product teams is critical at their company stage as they work to implement customers successfully and deliver on their value proposition. “We work with an ‘all hands on deck’ mentality consistently to ensure that we are doing whatever we can to create longstanding relationships with our customers. Our Customer Success team sits right beside our Product team which has proved to be an excellent strategy as we work to iterate quickly. In addition, we have started to elevate the importance of the Account Executive to Success Manager transfer internally as this is a key component to ensuring implementation gets off to a great start,” explained Dave.

How has Sigstr built a culture around Customer Success?

“Our CEO made a decision to invest in customer success very early,” said Dave. “A Customer Success leadership position was created to ensure that each customer gets the attention and support they deserve. By investing in the role (and department) from the outset, Customer Success has been a founding pillar within the organization. From the beginning, the goal has been to put the customer at the center of decision making to ensure we are constantly listening to and thinking about those things that create strong relationships, add value ongoing and ultimately result in customer renewals year after year.”

How can your CSMs vocalize customer concerns with executives?

1:1 employee/manager weekly meetings and product leadership meetings are the two primary vehicles for discussing customer concerns with executives at Sigstr. As the team evolves, NPS will be a consistent measuring device that will also assist with this type of communication. “We are also creating a voice of customer repository which will be used to highlight the most pressing customer feedback topics across all facets of the business,” said Dave.

The board, to the CEO, to every executive has to truly buy-in to the importance of Customer Success



Chrisy Woll

VP of Customer Success

campuslogic

Chrisy Woll is VP of Customer Success for CampusLogic, and has spent a tremendous amount of time developing her team, learning about compensation and bringing on new tools, and fostering an incredible culture focused around CampusLogic's customers.

In 2014, CampusLogic delivered the first and only cloud-based student self-service platform for financial aid. Now, with 300K+ active students across nearly 40 colleges and universities, the company helps higher ed deliver an exceptional financial aid experience at a fraction of the time and budget institutions spend today.

How do you determine salary for your CSMs?

For Chrisy and the CampusLogic team, the salary and bonus structure is still a work in progress, probably always will be to remain competitive. “We are very competitive with our salaries and we are still trying to figure out the bonus structure,” explained Chrisy. “Right now we have a base salary and we are still trying to figure out how we want our bonus to be structured, we will most likely have a 90/10 split - the CSMs total earning potential will be 90% salary and 10% bonus. I spend a lot of time identifying the metrics to motivate and encourage the right behaviors. It is very important to me that the bonus goal is a stretch but not unattainable which would cause a defeated mentality. I also need to provide my team with all the resources necessary so they feel empowered to hit their goals.”

How do you determine quotas for your CSMs?

The CampusLogic team uses the “WIG” (wildly important goal) and leading measures that help them to hit their WIG. Chrisy explained, “The WIG methodology is from the book ‘4 Disciplines of Execution’. The WIG is a lagging measure and the leading measures are the daily, weekly, monthly and quarterly targets that will help us hit our WIG. The CSM’s goals are based on leading measures.” These leading measures are:

- Decrease support response time,
- On-boarding in 30 days or less, and
- Increase Success Score

The CSMs at CampusLogic have targets and goals based around their quarterly goals, which are broken down to daily and weekly goals for the leading measures. The team has weekly WIG meetings to talk about what was accomplished the past week and what the goals are for the coming week. Chrisy advises that this meeting, if others choose to adopt it, should be very focused and only talk about the WIGs.

What are the most important tools that your team uses?

The most important tool CampusLogic CSMs use every day is ClientSuccess. This software helps them manage their daily tasks and follow up plans. As a VP that is in charge of the overall success of customers, Chrisy is constantly in the ClientSuccess platform as well looking at customers that are at-risk, up for renewal, on-boarding success cycles, scoreboard, etc. Chrisy explains that the only way for this tool to be effective is to truly ingrain the process in your day to day practice. “If the data isn’t in there, or if it isn’t updated accurately, the tool is not effective in truly monitoring customer success.” CampusLogic CSMs have 4 things they do after every customer interaction:

- Update the Pulse,
- Update the Scoreboard,
- Update Success Cycle, and
- Add a note in Communication

These 4 follow-up steps are critical to ensuring their information is updated and showing the current state of their customers.

How do you get support from the entire company?

“Customer Success is a company problem—it is not a Customer Success team problem,” said Chrisy. “This has to be something that is built from the top down. The board, to the CEO, to every executive has to truly buy-in to the importance of Customer Success. At CampusLogic, we have a company WIG (wildly important goal). Our WIG includes a customer count and revenue target for the year. Because of the industry we are in, and the limited number of potential customers, we have to ensure every single customer experience is amazing. It is important to keep our current customers and make sure they are always speaking highly of our product and service. Each department also has their own WIG.”

The leadership team, including Chrisy and her peers, meet weekly to discuss what they are working on and if there are any obstacles that somebody can help them overcome. This helps create transparency and gives them the opportunity to bring up any concerns with sales, product, marketing, customers, employees, etc. They also meet weekly with the CEO to talk about high risk customers, any implementation issues, tech support, and any other issues in the Customer Success department. “This time is very helpful to gain support and direction,” said Chrisy. “This also keeps our CEO involved in the pulse of our customer’s success.”

How has CampusLogic built a culture around customer success?

CampusLogic has a culture that is built on core values and our purpose. “We truly believe in our core values – the core values are not just something on the wall that nobody knows, our core values are a part of our hiring, training, reviews, daily conversations, goal setting, etc.,” explained Chrisy. “One of our core values is ‘We love our customers and they know it’. It’s one thing to love your customers, it is another level to get them to know it! When the whole company buys into the core values because they truly speak to who we are and why we are here, Customer Success is naturally built around the company.”

“There are many companies who have what I like to call ‘fake Customer Success;’” said Chrisy. “They say they want their customers to be successful, they may even have a Customer Success team, but all they really mean is we only see dollars signs and we know retention is important. Yes, retention is EXTREMELY important, but is a broken system if the only time your customer feels any love is when they try to cancel.” Chrisy explains that she has seen both sides of an authentic Customer Success culture and a fake Customer Success culture. Her explanation is this: “If you have to sit and wonder if you have a fake Customer Success Culture, you probably do. A good sign of a fake Customer Success Culture is one where the only time people go out of their way to help a customer is when the customer is mad or going to cancel—that’s a big sign the culture is not built around Customer Success. If you are at a company that is pro-actively following up with customers, building relationships of value, listening to customer feedback and doing something about it, and you are constantly trying to improve the customer experience in ALL department—that is a great sign of a culture of Customer Success.”

How can your CSMs vocalize customer concerns with executives?

CampusLogic has a very open door policy. “Our Customer Success and Sales teams know they can include any executive on a call or ask them for help in solving a customer issues,” explained Chrisy. “I use the ClientSuccess Pulse indicator to talk to other executives to help with customers issues as well. The more involved the executive team is with issues our team and customers are facing, the better we are at resolving real issues.” One of our core values is “We love what we do and we fix what’s broken” as a company we all know it is inevitable there will be issues but we are committed to fix what’s broken.

Chrisy meets with each of her CSMs weekly for 30 minutes for a “customer download”. This is a time where the CSM can voice any customer concerns and also our customer wins. “We want to make sure all of our customers feel like they are getting value, and value to each customer is very different” Chrisy explains. If there are any issues, we take this time to discuss a plan and who we need to enlist the help of in the company.

Just last week our CEO came up to me and said “Chrisy, I want to talk to customers, please remind your team that I am happy to jump on any customer calls with them. I would love to help in any way possible.” When you have an executive team that is constantly asking how they can help, and they truly mean it, this gives everybody the confidence to go an executive with concerns or to help them with a customer issue. If you walk around the CampusLogic offices, it is very normal to see a CSM sitting in an executive’s office with one of our customers on speaker phone as they strategize and solve problems together. It is a really awesome thing to be a part of and witness! We are a company of people who believe in our purpose—we help schools change lives. That purpose drives our desire to help with all customer concerns, we are one team with a really awesome purpose!

Be sure to add value with every interaction... if the customer gets what they need, everyone wins



Jackie Golden

Founder & CEO

LandNExpand

As Founder and CEO of a company that focuses on Customer Success as their business service, Jackie leads with a customer focus at the front of everything her consulting firm does. From hiring the right candidates to growing the team at the right time to determining the right way to compensate, Jackie has thought through every aspect of Customer Success.

Located in, San Diego, California, LandNExpand is a Customer Success consulting firm designed to help small and growth companies develop the right customer experience strategy and management model for their business in order to achieve revenue goals while increasing customer renewal and retention rates. They develop the customer experience model using a Customer Lifecycle model and detailed management execution plans that ensure the strategy gets to be reality.

What are the qualities you look for in Customer Success candidates at LandNExpand?

As Jackie's company, LandNExpand, is consulting on Customer Success best practices, it's crucial for her to hire the right team members that keep the customer at the forefront. Here are some of the qualities she looks for in her candidates:

- Excellent communication, organization and planning skills
- Customer services, relations or sales experience
- Consulting experience in market segment and industry
- Technology Implementation experience
- Experience in architecting solutions, best practices and/or building roadmaps along maturity models for customers in a market segment focus.
- Project Management experience, experience in creating plans for customers with a phased approach if the industry or solution requires significant business transformation to get to the value state.
- Experience in following and understanding the value of a proven methodology

How important is past experience when hiring?

Jackie explains that the most successful CSMs she's hired have come from her consulting teams. "They understand the market segment, industry, customer profiles, and best practice approaches. These kinds of candidates with that prior experience can help customers understand where they are in a maturity model and build a roadmap plan for customers to get from where they are today to the future visionary state. With this approach, the customer perceives their CSM as a trusted advisor, not a sales person. They are more invested in the relationship and willing to share key inside information that is critical to understand the current state of the customer and their readiness for expansion," explained Jackie.

What are some interview questions you like to ask?

Throughout her consulting and Customer Success career, Jackie has become very experienced in asking the right kinds of interview questions that reveal qualified candidates. Here are a few of the questions she likes to ask:

- What is your approach to creating a roadmap to success for a customer?
- What is your philosophy for servicing customers?
- What techniques have you found successful in dealing with challenging and upset customers?
- How do you approach a book of business (list of accounts) for a quarterly plan to get to your goals?
- Do have experience with a Customer Life Cycle model? Building customers for life? If not, what models have you found most successful in creating successful customers with healthy customer base metrics?

- What goals or metrics have you been held accountable for in your past lives? Which ones did you have the most impact on?
- How do you assess a customer's current health state?

How do you effectively train and scale your team? What are the keys?

Jackie explains that the key is to ensure the CSMs are educated on the best practices approach for implementing the product in the target markets. "They should have knowledge of the industry and best practices, said Jackie, "They should have elements in their CSM program that continue to add value and educate customers with every touch point. They should be able to strategize with customers on their roadmap and strategic plans in using your solution in an indispensable manner."

Jackie also uses these 4 tactics to ensure her team is fully trained and able to engage successfully with customers:

1. An onboarding certification program
2. Quarterly ongoing education
3. Recertification each year
4. Develop a methodology for managing a book of business to maximize the productivity and revenue contribution of each CSM

How do you determine salary for your CSMs?

For Jackie's company, there are 2 scenarios for determining the salary, which include:

For a consulting background, the base will be higher and the commission lower. "However, you can get these resources at lower bases with a highly leveraged plan as well with stock options," explained Jackie.

For a sales background, Jackie explained, "You can get a lower base and much more highly leveraged comp plan."

Jackie explained that for her company, the ranges have been wide based on experience and background required to execute a successful CSM program (\$55k base - \$105k base) with commission and bonus plan (\$25k – \$150k), which can sometimes include end of year accelerators.

How do you determine quotas for your CSMs?

When determining quotas for her CSMs, Jackie explained that they build it into their overall company financial model. "This is based on growth rate planned and the mix of net new and expansion. Finance should create several scenarios in which the expansion and renewals goals deliver the financial results approved by the executive team and board."

Jackie concluded that, "From these values, it is easy to create the quotas for renewals, expansion and customer health metrics for the CSM team. The use of a capacity model will help you determine the right number of accounts to assign based on market segment and size in determining their quota with a named account list."

Staying close to customers is incredibly important to any company, but especially for growth-stage companies like us



Ursula Llabres

VP Customer Success



Ursula owns the Customer Success Management & Success Programs functions, so she is very ingrained in the company's processes, hiring, and metrics. She's also a big believer that success for their customers should be the driver of the entire company.

InsideSales.com is based in Silicon Slopes, Utah's high-tech corridor. InsideSales.com offers the sales industry's first comprehensive sales acceleration platform that creates high-performance sales teams with breakthrough technology. InsideSales.com customers experience revenue growth up to 30% in as little as 90 days.

What are the qualities you look for in customer success candidates?

As Ursula builds out her team of Customer Success professionals, she looks for certain qualities when she's interviewing her candidates, some of which include:

- Quality and thoughtfulness in questions they ask, and who are NOT afraid of asking questions
- Hunger for knowledge, aptitude for learning
- Good listeners and those who tend to validate what they have heard
- Natural networkers; those that can connect the dots, build relationships and who are interested in enhancing relationships
- Disciplined and methodical
- Those who naturally like to plan things out and execute on the plans
- Adaptability and creative thinking
- Natural problem solvers
- Positive attitudes

What are some interview questions you like to ask?

“I focus on questions that allow the interviewee to share concrete stories where their experience on a certain topic can be revealed,” said Ursula. “I focus on questions that reveal more about the candidate’s true colors.”

For example, Ursula would ask these questions to corporate-level Customer Success Manager candidates:

- Tell me about a time when you had to turn a customer from a detractor to an advocate?
- What is a typical day in the life for you?
- In context of your current role, what are you most proud of currently? Why?
- If today you manage 50 accounts and tomorrow your portfolio increases by 30 accounts to a total of 80 accounts, how would your account management processes change? What would be 3 key things you would do to manage the change and deliver results?
- Give me an example when you did something that made you feel extremely satisfied/dissatisfied with how you worked with a customer? What did you do after that?
- What do you enjoy/dislike the most about what you do today?
- Give me an example of a time when your work impacted your peers positively.

How do you know when to hire more CSMs?

Ursula is always thinking about her team's structure and her ratio of CSMs to clients. She explained that the trigger points for hiring a new CSM are based on account numbers and on portfolio value thresholds. "It is important to note that there is a cost of retention model that plays a role," explained Ursula. "Hiring new CSMs as the company grows needs to be combined by also allocating operational and program resources that help scale the growth and manage the cost of delivering success."

How do you effectively train and scale your team?

Ursula believes that "CSM Journey of Mastery" should be analogous to how they design the success activities aligned with the customer journey. She explained that the Onboarding/Adopt stages are critical in both CSM and Customer Journeys. This includes:

1. A solid onboarding and active plan for the first 90 days is KEY
2. A quarterly mastery plan for the 1st year is critical to success. This is a list of key tactical activities, behaviors, and knowledge milestones a CSM must accomplish for their 1st year.
3. For on-going enablement and training, Ursula likes to develop something called a CSM Skills Matrix model that is part of the Performance Assessment process. In this model, the CSM can fit themselves in that skills maturity framework and then develop a personalized training and enablement plan.
4. Technical/Product, Process and Soft Skills training are a must in the plan (whether or not you have a skills matrix model ready to be implemented or not)

How do you determine salary for your CSMs?

“This is something that is developed in conjunction with the Finance team,” explained Ursula. “I believe that whatever the model, what CSMs value most is knowing how they can succeed. This means having clearly communicated and understood objective and success measures and a transparent performance assessment process. Without this, you can have great compensation, but little commitment or motivation.”

In Ursula’s experience having worked at Salesforce.com, Microsoft Office 365 Division, Box and InsideSales.com, she has seen 3 different CSM compensation models, which can each be effective in their own right. These include:

1. Base/CSM KPI-driven bonus of 70/30
2. Base and Business Unit/Company performance bonus of 85/15
3. Base only (no bonus)

**The role of sales is to make
customers smarter about their
own business, not ours**



Todd Williams

Executive Vice President, Worldwide Client Services

inmoment

In his role as Executive Vice President, Worldwide Client Services at InMoment, Todd has to understand all aspects of the customer experience, and is tasked with building a world-class team to support their incredible customers, who are also building Customer Success teams.

InMoment is a cloud-based customer experience (CX) optimization platform that gives you the ability to listen to and engage with your customers to improve business results through better experiences. Their products and services include Voice of Customer (VoC), Social Reviews and Advocacy, Employee Engagement, Support, and Consulting. They are the leading VoC vendor for the food services, retail, and contact center industries, with deep domain expertise in B2B, healthcare, hospitality, and numerous others.

What are the qualities you look for in Customer Success candidates?

1. Passion
2. Experience
3. Credentials

Todd stresses that the above list is usually in that order. “Passion is important to me as it’s something that can’t be taught or learned,” explained Todd. “Passion and personality is critical to the ability to retain and grow customers in the SaaS environment. Over the past decade, I’ve hired exclusively for Customer Success teams and been involved in literally hundreds of resumes and interviews.”

Todd goes on to say, “The qualities that I am specifically looking for involve the desire to succeed and be part of the dynamic and growing organization. In our fast paced software environment, we desire someone who will jump in and ensure 100% retention of their SaaS customers. This quality is displayed in their passion for life and their past experience. Successful candidates usually have some type of past experience in managing relationships and renewals in the technology space. This experience is key as it helps ensure relationships can be built and maintained which is critical and defines the most important factor of Customer Success. Other credentials,

such as schooling, clubs, proficiencies, etc., are less important but still define the candidate as grounded and active in their societies.”

How important is past experience when hiring?

As Todd mentioned in the last question, experience is important to him, but he often looks for passion and personality as a predictor of success first. According to Todd, experience is something that can be taught and trained.

What are some interview questions you like to ask?

Todd has been part of hundreds of interviews, so he has a tremendous amount of experience in this areas. He shares some of his favorite questions to ask when finding the right fit for his Customer Success team:

- Give me an example of where you have been successful in your career?
- Tell me how your past experiences have taught you to work differently or smarter in your current work environment.
- Specifically tell me about what you are doing everyday to be better, smarter, faster, or stronger?
- When was the last time you were helpful to a separate corporate division? Tell me about that experience.
- Tell me about a past failure. What did you learn from that experience?

How do you know when to hire more CSMs?

Todd specifically hires based upon two needs: planned or unplanned turnover and corporate growth. Both instances require proper planning and effective execution. Todd explains that, “Unfortunately, people lose focus, ability, or effectiveness and must be managed up, managed over, or managed out. I am always interviewing, finding, searching, and comparing outside talent with internal abilities. In this process I am always gauging the effectiveness of the team and what abilities and pay scale are out in the market. I then develop a culture that lifts, grows, and rises current talent. However, oftentimes turnover occurs and I’m ready to pull the trigger on the best talent that we have interviewed in recent weeks.”

How do you effectively train and scale your team? What are the keys?

Todd believes that team motivation, training, and inspiration must be constant. Product, engineering, social, and industry training is critical to maintain effectiveness. “I scale by segment (size or revenue of account) but also by industry or specialization. The key to successful segmentation is ensuring that program effectiveness is maintained while still giving CSMs the ability to go ‘wide and high’ in an organization through increased relationship and adoption value.”

How has InMoment built a culture around customer success?

“Within the Client Services department, we are responsible for 91% of the company’s 2017 quota,” said Todd. “This retention is critical to the company’s growth strategies. Being such a critical component to the company’s earnings, and being instrumental in guiding the company’s future allows me to pivot the organization around retention of client revenue.”

**Make sure the importance of
the customer is immersed in the
fabric of your company**



Andrew Wise

Head of Customer Success, Europe



In Andrew's role as Head of Customer Success for Europe, he takes building a great team of Customer Success professionals very seriously. His team members are the main point of contact with customers and can be the reason a customer has a positive experience with their brand—or not.

Act-On's platform empowers organizations to engage with buyers across the entire lead-to-revenue process. And they've done it in a way that offers simplicity and ease-of-use for the marketer. They've built a platform that gives small and medium-sized organizations all the value of marketing automation – without the unnecessary complexity of big enterprise systems. Their platform offers robust core functionality at the heart of an open marketing technology ecosystem.

What are the qualities you look for in Customer Success candidates at Act-On?

When building his team, Andrew looks for candidates that are driven, determined, good listeners and able to build good rapport with customers. He explains, "It's useful if they have experience in digital marketing or some sort of customer service or support. However, we have CSMs that have no experience at all, but are keen to learn and are driven by success of customers and have become a great asset to the company."

How important is past experience when hiring?

Building a successful team in Europe has proven to be more challenging for Andrew and the Act-On team as Customer Success as a function is just getting its start and isn't a common role or department just yet.

"In my opinion past experience is good, but for us [in EMEA] it's a challenge finding people with marketing automation experience due to its early infancy in Europe," explained Andrew. "That's why it's key to think outside the box and find people who can adapt and learn quickly."

What are some interview questions you like to ask?

In order to find the right individuals for the Act-On EMEA team, Andrew has developed several questions that help him to identify high potential candidates, some of which include:

- Why customer success? What interests you about this role?
- Describe a situation where you helped to exceed customer expectations?
- Why should we hire you as a CSM?
- What is your greatest strength?
- What is your greatest weakness?
- Describe a situation where a customer has put you under pressure and has an urgent issue they need help resolving. How did you handle this?

How does your customer success team get support from the entire company?

Culture is important to Act-On, and it's always ingrained in the team that they should collaborate not only within their own office in the UK and across EMEA, but with the entire company. "We have a strong eco-system and good communication between departments," said Andrew. "We hold regular 'all hands meetings' to ensure employees are up to speed with developments and changes within the organization as well as additional training and support from other teams and departments."

This transparency and cross-departmental work has been incredibly important to Act-On, and will continue to be an integral part of how their customer success team is run. Transparency, candidness, and involvement from all departments is key to their success.

How has Act-On company built a culture around customer success?

“For us, Customer Success has been the main driver in our growth and one of our core values since we were founded in 2008,” explained Andrew. “The customer experience drives everything we do. The success of our customers relies on maintaining positive customer relationships that provide ongoing value - no matter the role or seniority level.”

**The only way to get the
right information is to speak
to your prospects and
customers on a regular basis**



Alex Timlin

VP, Client Success



As VP of Client Success at Emarsys, Alex has the very important role of ensuring that customers are incredibly successful using their products and services. So building an effective team of customer success leaders is absolutely crucial.

Emarsys is headquartered in Vienna, Austria and its mission is the strengthen the relationship between brands and their customers. They help marketers using The Emarsys B2C Marketing Cloud drive deeper brand loyalty, customer satisfaction, and revenue. Emarsys is one of the fastest-growing and most innovative companies in the world, serving more than 1,500 clients in 140 countries. They analyze and segment more than one billion customer records to deliver insights that empower marketers, and campaigns that engage individuals. This strengthens the experience and the relationship between their clients and their customers.

What are the qualities you look for in Customer Success candidates at Emarsys?

“The concept of a ‘Trusted Advisor’ is something we champion at Emarsys, said Alex. “In the first element of ‘trust’, we look for people who are great team players, with high social skills and demonstrate that they are really focused on customers, their business and our business - not just themselves.” Alex explains that this is key because they are essentially the quarterback in Emarsys’ client relationships so the client needs to trust that they’ll run the right plays both in their interactions with clients and most importantly with their services team at Emarsys.

“To be an advisor you don’t need to be an expert in everything,” explained Alex. “We need people who can ask the right questions and run the right processes to understand the client’s needs, wants and expectations and align them with the subject matter experts here at Emarsys. Strong questioning and presentation skills are really key, so for us the second interview is always based around a presentation and a scenario to really make sure candidates have that two way interaction – all too often people are slick at presenting and know the industry or know client management but they ‘broadcast’ too much. When that happens, it’s hard for them to make that leap

from Commercial Account Management or more Service-based roles into Customer Success.”

How important is past experience when hiring?

Customer Success is a new area – and within different organizations it’s either a function of onboarding (helping clients realize first value quicker in light touch SaaS models) or a function of renewals and growth (higher touch SaaS models post implementation to expand and retain once clients have reached “first value”). Alex explains, “We fall into the second camp at Emarsys so we’re targeting our CSMs on revenue retention (100%) where growth is there to offset churn on annual or multi-year contracts for our SaaS Digital Marketing platform. This means even in the industry and in the same role, you don’t always find all the transferrable skills you need in a candidate.”

Alex’s personal philosophy has been shaped by the expectation that every new recruit they onboard is going to be a project – they just need to understand where they should invest in that recruit during ramp up, but the more they need to invest, the longer the ramp up and the greater the cost to the business and to their clients.

So they break it down into the two camps with experience:

1. They either ramp up skills in Client Management (many aren’t used to “owning” a portfolio of clients or dealing with delivering the ongoing value or dealing with the same personas, such as: C-Suite, Head of X, Director-Level, rather than user-level)
2. Industry or Product Knowledge (it’s important a CSM really know the value of the product and how to talk to that and really add value to clients around digital marketing with experience from previous roles). According to Alex,

“You can teach someone who isn’t strong in one area – but if they don’t have transferrable skills from either a competitor where they know the product and industry OR a strong background in Client Management or Customer Success, the ramp up is too long and the chances of that person being successful almost exponentially decreases.”

What are some interview questions you like to ask?

Alex’s favorite questions to ask revolve around getting a candidate to really demonstrate they have been there and done that before on certain elements. Alex advises, “The devil really is in the detail so to get beyond great showman or people who ‘interview well’, it’s important to get some practical examples of their past experiences, in the most positive light.” Some of his favorite interview questions include:

- “What are your greatest successes in the last year in your current role?”

What Alex is looking for are positive people who put their clients first. “It’s amazing how many client focused people talk about their own personal achievements but neglect to mention clients or colleagues,” said Alex. “Teamwork is important and we’re looking for people who tie their own personal success to their client’s success and the company’s success so we probe around their answers to find out how they’ll fit in with our culture and dynamic.”

- “What has been the biggest challenge for you to overcome in your current role?”

Honesty and integrity are leading indicators of someone who’s going to fit that brief of being a “Trusted Advisor”.

“People who talk about unsolved challenges and issues typically don’t represent the positive mindset or collaborative spirit we have here as part of our Emarsys values,” explained Alex. “Questioning around this helps us find people who are willing to take ownership of their part of the problem in the role and aren’t just looking to blame colleagues, clients, managers as to why they weren’t successful or are looking to move.”

- “Do you have a favorite client at the moment and why do you enjoy working with them?”

Creating a customer-centric culture is about staffing the team with people who understand customers and enjoy working with them. “Everyone has difficult clients but you’d be surprised how many candidates really don’t work in a way needed to develop strategically important (commercially or otherwise) clients,” said Alex. “Answers range from being socially close to them (the guy at company X is awesome, we meet once a month for a beer and a burger), being an interesting business (they received a ton of funding and they’re really experimental, so they’re always trying crazy stuff that’s really challenging but really interesting), they’re a cool brand (I always wanted to work with a company like X and it’s awesome to have the chance to do so).”

How do you know when to hire more CSMs?

There are two real “needs” to balance when heading up a Customer Success team – the clients you’re getting as a function of new business sales growth and the clients you have that represent the future success of your business. Alex explains, “Therefore it’s essential you have visibility into these key metrics. As a Customer

Success professional you need to have close links to your sales leaders and your implementation teams – what the pipeline of new clients coming—know your sales cycle and get an early view of sales effectiveness.

For example, Alex explains: If you know there's a 60 day sales cycle and a 50% conversion ratio of late stage deals, you can plan ahead to say “do we have enough capacity to onboard these new clients to first value?” (will the client's first experience with your brand be a great one) and “do my team have the bandwidth to help their clients achieve their goals?” Venture-backed high growth startups often over or under hire in Customer Success – potentially planning for a huge new business spike that's always “just around the corner”. As a result, they have excess capacity or run far too lean to provide a great customer experience when new business really ramps up. Either way, it can be damaging to your revenue streams and potentially your brand.

We've learned how these customer success leaders are rallying their teams and making customers the heroes—now you tell us:

How does your organization create a culture of customer success?

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