

THE ULTIMATE GUIDE TO SAAS

# CUSTOMER SUCCESS METRICS



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THE ULTIMATE GUIDE TO SAAS

# CUSTOMER SUCCESS METRICS

*Brought to you by ClientSuccess  
and the 2016 CS100 Summit attendee executives*

client**success**

**CS100**  
SUMMIT 

Dear Reader,

In late 2016, the ClientSuccess team hosted the first annual CS100 Summit in Park City, Utah where we gathered 100 of the world's most respected customer success executives and leaders from top B2B SaaS companies. This inaugural Summit provided customer success executives an exclusive learning environment with like-minded leaders in an atmosphere of inspiration, ideation, strategy, and real-world application around customer success.

The CS100 participants collaborated on this insightful and high-impact thought leadership eBook called The Ultimate Guide to SaaS Customer Success Metrics. Consider this their way to give back to the industry they love.

The CS100 attendees shared best practices, recommendations and alignment around 4 key categories of metrics including: SaaS financial metrics, customer success team performance metrics, customer health metrics, and product usage metrics. The outcome was a concise list of important metrics customer success leaders should pay attention to. Our ClientSuccess team then analyzed the data and surfaced 10 of the top metrics for each category.

This eBook is a compilation of powerful insights and years of best practices inspired from those 100 respected customer success leaders. We hope you will use this information as your go-to guide as you build and scale your customer success team and drive a culture of customer success in your company. We welcome your feedback and suggestions as we continue to refine and evolve this eBook to be the most definitive guide for customer success metrics in our industry. Send feedback to [metrics@clientsuccess.com](mailto:metrics@clientsuccess.com) or [#csmetrics](https://twitter.com/csmetrics).

All the best,

Dave  
Founder/CEO, ClientSuccess  
[dave@clientsuccess.com](mailto:dave@clientsuccess.com)



## 1

## Revenue Retention Rate (Gross & Net)

*The amount of recurring revenue (ARR/MRR) a company is able to retain for any given period. **Gross Revenue Retention** only considers the starting revenue minus any revenue lost through downsell or churn. **Net Revenue Retention** considers the offsetting revenue from expansion (upsell and/or cross-sell). Some refer to this metric as **Dollar Revenue Retention (DRR)**.*

Be sure to review both Gross Revenue Retention and Net Revenue Retention. Companies that only focus on net numbers will likely misjudge the true health of their business because the net results may mask the symptoms of churn. Revenue Retention Rate is also a very different metric than Renewal Rate (see definition below), so be careful to distinguish between the two metrics and be sure to measure both.

### GROSS REVENUE RETENTION:

$$\frac{(\text{Starting MRR} - \text{downsell} - \text{churn})}{\text{Starting MRR}}$$

### NET REVENUE RETENTION:

$$\frac{(\text{Starting MRR} + \text{expansion} - \text{downsell} - \text{churn})}{\text{Starting MRR}}$$

# 2

## Revenue Churn Rate (Gross & Net)

*Revenue Churn is simply the opposite of revenue retention - the percentage of recurring revenue (ARR/MRR) lost through downsell and/or churn in any given period. **Gross Revenue Churn** only considers lost revenue whereas **Net Revenue Churn** includes any offsetting expansion revenue. When expansion revenue is greater than churn, that is often referred to as “negative churn.”*

Understand your revenue (or dollar) churn rate and focus intently on driving it down. World-class SaaS companies have negative churn (or net growth).

### GROSS REVENUE CHURN:

$$\frac{(\text{Downsell} + \text{Churn})}{\text{Starting MRR}}$$

### NET REVENUE CHURN:

$$\frac{(\text{Downsell} + \text{Churn} - \text{Expansion})}{\text{Starting MRR}}$$

# 3

## Customer Retention Rate/Customer Churn Rate

**Customer Retention Rate (CRR):** *The percentage of customers retained over a given period of time. This is also referred to as “Logo Retention”.*

**Customer Churn Rate:** *The percentage of customers that are lost (i.e. cancel their subscription) over a given period time. This is also referred to as “Logo Churn.”*

While both revenue retention and customer retention are important, many SaaS companies place a higher value on revenue retention because revenue is king in any SaaS business. For example, you may lose 10 customers with subscriptions of \$10,000 each for a total of \$100,000 in lost revenue, or one larger customer with a subscription of \$150,000. In this case, it may be better to lose the 10 customers equaling \$100k in ARR, rather than the one customer and \$150k in ARR. Just keep in mind that the 10 lost smaller customers carry additional hidden costs as they may become negative advocates in the market.

### CUSTOMER RETENTION RATE:

$$\frac{1 - (\text{customers churned in period})}{\text{customers at the start of the period}}$$



CUSTOMER CHURN RATE:

$$\frac{\text{customers churned in period}}{\text{customers at the start of the period}}$$

# 4

## Renewal Rate (Gross & Net)

**Gross Renewal Rate:** *The percentage of \*renewable\* revenue that actually renewed in a given period. Gross renewal rate only considers downsell and churn and does not include any offset from expansion revenue that happened at the time of the renewal. Gross renewal rate can never be greater than 100%.*

**Net Renewal Rate:** *The total revenue renewed and gained from the \*renewable\* book of business for a given time period. Net renewal rate includes any expansion revenue (upsell and/or cross-sell) added as part of the renewal transaction; therefore, it's feasible that the new renewal rate could be greater than 100%.*

Renewal rates specifically correlate to renewal transactions whereas revenue retention considers any increase or decrease of recurring revenue during a time period, including expansion, downsell and/or churn that may happen outside of a renewal (i.e., mid-term expansion, etc.). Renewal rates should always be calculated against the \*renewable\* book of business (RBOB) for the specific time period.

### GROSS (OPTION 1):

$$\frac{\text{Renewable MRR} - \text{Downsell} - \text{Churn}}{\text{Renewable MRR}}$$

GROSS (OPTION 2):

$$\frac{\text{Renewed MRR}}{\text{Renewable MRR}}$$

NET (OPTION 1):

$$\frac{\text{Renewable MRR} - \text{Downsell} - \text{Churn} + \text{Expansion}}{\text{Renewable MRR}}$$

NET (OPTION 2):

$$\frac{\text{Renewed MRR} + \text{Expansion}}{\text{Renewable MRR}}$$

# 5

## Quick Ratio

*Created by Mamoon Hamid, the Quick Ratio measures growth efficiency for a SaaS company, comparing revenue growth (new and expansion) against revenue churn (downsell MRR and churn MRR).*

The following Quick Ratio guidelines help identify the strength of your company's growth:

- Quick Ratio < 2 - bad growth
- Quick Ratio 2-4 - ok growth
- Quick Ratio > 4 - good growth

$$\frac{(\text{New MRR} + \text{Expansion MRR})}{(\text{Downsell MRR} + \text{Churn MRR})}$$



# 1

## MRR

*The amount of Monthly Recurring Revenue for all paying customers at the end of any given month.*

Revenue from consulting/professional services (or “one-time” revenue) should not be included in MRR calculations. Only recurring revenue.

MRR (OPTION 1):

$$\sum \text{Month}_x \text{ Recurring Revenue}$$

MRR (OPTION 2):

$$\frac{\text{ARR}}{12}$$

# 2

## ARR

*While MRR measures the sum of recurring revenue each month, Annual Recurring Revenue (ARR) measures the recurring revenue a company will generate over the course of a year. ARR is used to predict annual recurring revenue for the coming 12 months, assuming no changes to the customer base.*

Similar to MRR, revenue from consulting/professional services (or “one-time” revenue) should not be included in MRR calculations. Only recurring revenue. ARR is different from ACV (annual contract value) as ACV includes any revenue, including one-time revenue. Don’t mistake the two.

$$ARR = MRR * 12$$

# 3

## Month-over-Month Growth Rate

*The total amount of recurring revenue growth (or decline) this month compared to the previous month.*

MoM growth rate of 10% is considered strong growth, 20% or higher is considered world-class.

$$\frac{[\text{MRR this month} - \text{MRR last month}]}{(\text{MRR last month})}$$



# 4

## Expansion Growth Rate (Upsell + Cross-sell)

*New revenue from **current** customers as a result of selling more of the same product (upsell) and/or new products (cross-sell).*

Expansion growth rate can be one of the best indicators of the health of your business as typically customers who are purchasing more are getting high value and have a very high propensity to re-new year over year.

Expansion MRR

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Previous Months MRR

# 5

## Down-sell Rate

*The total amount of MRR lost by customers who reduce their subscription revenue in a given time period. Churned customers do not count as downsell as they have terminated their subscription all together. Down-sell results from someone who continues their subscription but reduces the spend on the subscription (i.e. reduces # seats, stops using product for a team or division, etc.).*

Downsell could happen as part of a renewal or mid-term (separate from the renewal).

Down-sell MRR

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Previous Months MRR



## 1

**Product Usage - DAU/MAU Ratio**

*Product usage measures the level of engagement the customer has with your solution. A simple signal to watch is the growth (or decline) of Daily Active Users as a percentage of Monthly Active Users (MAU).*

Every SaaS company will have a slightly different DAU/MAU baseline or target. Some SaaS solutions are such that users should login and use the product every day to be considered “active”. Others consider “active” to be users logging in once per week. Define the usage baseline for your SaaS solution and then work hard to increase that baseline over time. Caution: this could also be a vanity metric so don't rely entirely on this (or any product usage) metric as the only indicator(s) of health. It's entirely possible that a customer could login every day but still churn. Logins do not equal value.

$$\frac{\text{total unique users logged in today}}{\text{total unique users logged in last over the 30 days}}$$

# 2

## Product Adoption - Stickiness

*Whereas DAU/MAU ratio measures the frequency of using a SaaS solution, product adoption measures \*breadth\* and \*depth\* of using a SaaS solution.*

Identify the features/feature sets that provide the most tangible value (“value features”) for your customers and deliver the outcomes they desire. Then, measure the adoption of those features/feature sets.

$$\frac{\% \text{ “value features” used}}{\% \text{ total features, trended over time}}$$

# 3

## Customer Engagement

*Frequency of engagement a customer has with your team across a number of touchpoints (email, phone, meetings, chat).*

Customer engagement goals are largely determined by the nature of your product and customer success strategy - particularly whether your model is more low touch or more high touch. Embrace your most vocal customers as they tend to be those who genuinely want you to succeed. Beware of customers who are not engaging because that is an early warning sign of churn.

days since last touch, # touches, average frequency of engagement

# 4

## Customer Pulse from CSM

*Frequent feedback from CSMs and other members of your team about customer disposition and health, usually gathered in the form of a simple Red, Yellow, Green scale.*

Many leaders believe subjective feedback from the team is unreliable and inaccurate; however, it can be a very reliable and accurate reflection of customer disposition if the following best practices are implemented: 1) set firm team guidelines for the frequency of Pulse updates (i.e. updated every 30 days, once per quarter, etc.); 2) create definitions for each subjective status/color (i.e. “what does “Red” mean for us?”); 3) ensure the team knows they aren’t judged by the status but rather the status is critical for driving insights across the business; and 4) actively leverage the Pulse insights to drive action and customer experience improvements across the business.

**# customers in each status, ARR by status**

# 5

## Net Promoter Score (NPS)\*

*An industry standard measurement of customer satisfaction, customer experience and customer loyalty. NPS simply asks how likely a customer would recommend your (company/product/solution] to her/his friends and colleagues, and measures the likelihood on a scale between 0 (not at all likely) and 10 (extremely likely). Responses are categorized in the following three ways: (9-10) Promoters, (7-8 Passives), (0-6 Detractors). The NPS score is determined by subtracting the percentage of detractors from the percentage of promoters, resulting in a number between -100 and +100.*

Although NPS has become a standard measurement across a number of industries, there is plenty of debate around the true correlation to customer retention or churn. It's best to measure at different stages in the lifecycle (i.e. onboarding complete, halfway through the term, 90 days from renewal) and put it into context with other customer health metrics.

$$\text{NPS} = \% \text{ promoters} - \% \text{ detractors}$$

\* Bain & Company, Inc., Fred Reichheld, and Satmetrix Systems, Inc.





## 1

## Support Tickets

*Support tickets submitted by the customer to ask questions, report bugs, request training and provide feedback*

Be careful not to assume that no support tickets is a positive sign for customer health. In fact, often the opposite is true because it might be a sign that your customer is not deeply engaged with your product. Identify the sweet-spot of healthy support ticket average for your customers and leverage that as your baseline. Too few support tickets is risky, and too many is also risky.

$$\frac{\text{\# customer tickets (period)}}{\text{average per customer (period)}}$$

# 2

## License Utilization Rate

*The number of paid licenses (seats) actively used vs. the total number of licenses (seats) purchased.*

For those SaaS companies whose pricing model is based on seat licenses, this metric can identify both at risk customers as well as potential expansion opportunities.

$$\frac{\text{\# active seats used}}{\text{total seats purchased}}$$

# 3

## Executive Sponsor Strength

### *Level of engagement with your executive sponsor*

Your relationship with the executive sponsor for any given customer could make or break your long-term partnership. It's critical to have a strong relationship with each executive sponsor. When that relationship fractures or if the executive sponsor leaves the company, consider the account high risk.

# Exec Sponsor touches in last 90 days

# 4

## Average Days to Onboard (ADO)

*The average number of days to complete onboarding for your customers.*

Dedicate a significant amount of attention to optimizing your onboarding experience as the first 90 days of a customer's experience will likely set the trajectory for the entire relationship. Optimize first around the customer experience and the customer's needs, and then around your resources and scaling objectives. Onboarding too quickly may not sufficiently enable a customer to succeed with your solution(s), but an onboarding experience rolling on for a year will severely impact the customer in a negative way.

# days to complete onboarding for each customer

---

total # customers

# 5

## Late Invoice Payments

*The number of days a customer's invoice is past due.*

There are a number of reasons why customers don't pay their invoices but any customer that is more than 30 days past due for paying their invoice should be considered at risk on some level.

**# days past the invoice due date**



## 1

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$$\frac{\text{total unique users logged in today}}{\text{total unique users logged in last over the 30 days}}$$



# 2

## Product Adoption - Stickiness

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Identify the features/feature sets that provide the most tangible value (“value features”) for your customers and deliver the outcomes they desire. Then, measure the adoption of those features/feature sets.

% “value features” used

---

% total features, trended over time

# 3

## License Utilization Rate

*The number of paid licenses (seats) actively used vs. the total number of licenses (seats) purchased.*

For those SaaS companies whose pricing model is based on seat licenses, this metric can identify both at risk customers as well as potential expansion opportunities.

$$\frac{\text{\# active seats used}}{\text{total seats purchased}}$$

# 4

## Time Spent in Product

*The number of minutes (or hours) customer/users spend in the product.*

Time spent could be measured by customer and/or by user. Like other usage metrics, time spent does not equal value so be careful assuming that significant time spent in your product will result in retention.

$$\frac{\text{\# minutes in product}}{\text{per customer (or user)}}$$

# 5

## Outcomes Achieved

*Total number of “outcomes” achieved through your solution. Different solutions will have primary outcomes their customers are expecting to achieve to help them drive their business. (Examples: CRM = deals closed; Subscription Billing = invoices sent or cash collected; Marketing Automation = leads created).*

By defining and measuring the key outcomes your solution delivers, you can optimize onboarding, training and ongoing enablement to help your customers execute those outcomes effectively and get more ROI from your product.

$$\frac{\text{\# “outcomes” achieved}}{\text{period}}$$



# 1

## Customer Maturity Score

*A customer maturity score is the output of assessing a customer's usage and adoption of your product against a detailed maturity model. The customer maturity model outlines different levels of proficiency, knowledge and sophistication that customers (or users) may scale to as they use your solution achieve desired outcomes. The more advanced the customer is in using your solution, the higher the score.*

Maturity models are typically very tailored to the functional focus on your solution as well as the level of expertise your customers and their users scale to over time. Building a maturity model and measuring maturity scores are usually very time consuming efforts, but pays off if done well.

**Sum of the individual scores for each proficiency area defined in the a customer maturity model**

# 2

## Power Users - Top 20 Users

*The top 20 users across your entire customer base or within a specific customer.*

Identifying power users helps you identify the potential advocates (references, case studies), champions (promote you internally at their company) and product advisors (feature requests, beta participants, etc.). Embrace your power users and leverage their enthusiasm for your product.

Top 20 users (overall), Top X users

---

customer

# 3

## Active User Growth Rate

*The rate at which the total number of active users increases (or decreases) for a given period of time (usually month-over-month).*

Be sure to clearly identify your definition of an “active” user and then drive that number up, even by small percentages, month-over-month.

(Active Users this period - Active Users last period)

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Active Users last period



# 4

## Top/Bottom Features Used

*A ranking of features used from top to bottom.*

Identify the top features used by your customers, understand why, and drive further adoption with those customers not using those features. Also, identify the features that have the least usage and determine whether they should be removed or improved.

Ranking of feature usage across all customers  
(and possibly by customer)

# 5

## Number of Logins

*The total number of logins into the product within a given period of time; can be calculated either as a total across your customer base or by customer or user.*

While logins is one of the most easy metrics to capture and gives a basic usage indicator, purely measuring logins is also one of the most dangerous vanity metrics for customer health. Logins do not equal value.

Count of total logins (total or by customer/user)  
in a given period of time.



## 1

## Quarterly Gross Renewal Rate

*The percentage of the quarterly renewable book of business (RBOB) that renewed (not including expansion revenue closed with the renewals).*

Measuring the team on renewal rate makes it clear that their primary responsibility is to drive value and retain customers. Focusing on gross renewal (vs. net) ensures the balance between retention and growth, and hedges the risk of retention issues being overlooked when expansion growth is strong.

$$\frac{(\text{renewable MRR} - \text{downsell} - \text{churn})}{\text{renewable MRR}}$$

# 2

## Quarterly Expansion Revenue

*Total amount of expansion revenue closed each quarter (both from expansion along with a renewal transaction and any mid-term expansion).*

Expansion is a great indicator of both value and retention. If your customers are buying more, they are highly likely to be happy with the product and highly likely to renew. The better CSMs are at aligning to the customer's objectives and driving value through your solutions, the greater chance the customer will expand their footprint of your product.

total expansion revenue per quarter

# 3

## Average Time to First Value

*The average number of days between the start of onboarding and the time the customer receives the first tangible value from your solution.*

Customers purchase your product to receive some kind of value (or outcome) from your solution. Customer success teams assume the responsibility to ensure customers receive that value. Remember, however, that each customer defines value differently. So, in order to deliver value, you need to understand your customer's definition of value (including objectives, goals, needs) and help them achieve those with your solution. Find one and deliver that as quickly as possible.

Total number of days between onboarding and first value for all customers

---

# customers

# 4

## Revenue Retention Rate (Net)

*The amount of recurring revenue (ARR/MRR) retained for any given period plus revenue gained from cross-sell and upsell within the current customer base.*

Net revenue retention places the emphasis on both retention and growth. The best SaaS companies have net revenue retention above 100%.

$$\frac{(\text{Starting MRR} + \text{expansion} - \text{downsell} - \text{churn})}{\text{Starting MRR}}$$

# 5

## Average Days to Onboard

*The average number of days to complete onboarding for your customers.*

Dedicate a significant amount of attention to optimizing your onboarding experience as the first 90 days of a customer's experience will likely set the trajectory for the entire relationship. Optimize first around the customer experience and the customer's needs, and then around your resources and scaling objectives. Onboarding too quickly may not sufficiently enable a customer to succeed with your solution(s), but an onboarding experience rolling on for a year will severely impact the customer in a negative way.

# days to complete onboarding for all customers

---

total # of customers





## 1

## Customer Retention Rate

*The percentage of customers retained over a given period of time. This is also referred to as “Logo Retention”.*

Focus on revenue retention and customer retention, but remember that revenue is king so you may place a higher emphasis in revenue retention. Be sure to always consider the downstream impact of losing customers including bad references from customers who leave.

$$1 - \left( \frac{\text{customers churned in period}}{\text{customers at the start of the period}} \right)$$

# 2

## **Customer Advocacy Activities (i.e., customer referrals, case studies, references, reviews, etc)**

*A review of a product or service made by a customer who has purchased the product or service.*

Customers that are advocating for you are a great resource to build your brand and to find new customers. A great measure for customer success teams is the number of customer advocacy activities they are able to drive. Whether a customer referral or reference call, new case studies, or positive customer reviews on G2 Crowd or TrustRadius, recognizing and rewarding CSMs for these activities is a powerful way to increase customer advocacy for your company.

total customer advocacy activities in a given  
time period (by team and by CSM)

# 3

## **Engagement Activity (Meetings, Emails, Phone Calls, Tasks, etc.)**

*The amount of engagement activity or ‘touchpoints’ a CSM has with customers over a given period of time.*

While any value-focused engagement with customers is good, focus on the most high impact activities - phone calls and in-person meetings if possible and ensure CSMs deliver value with every touch point. Also place emphasis on high-value engagement with Executive Sponsors and other key contacts. Finally, encourage CSMs to go “high-and-wide” within a customer’s organization to expand your relationship footprint.

count of all engagement touchpoints in a  
given period (by team and by CSM)

# 4

## **NPS\*/CSAT**

*Measuring CSM or customer success team effectiveness through customer sentiment/satisfaction surveys - either Net Promoter Score (NPS) or some other customer satisfaction (CSAT) methodology.*

NPS or CSAT is a tangible way to measure customer sentiment/satisfaction but doesn't always accurately reflect the CSMs performance. Be sure to dig into the details to understand the root cause of the score (positive or negative).

**average NPS or CSAT score (by CSM or team)**

\* Bain & Company, Inc., Fred Reichheld, and Satmetrix Systems, Inc.

# 5

## Success Plan Goals Completed

*The measure of how many proactive success plan tasks were completed in accordance with each CSM's success plan. Success plans (aka account plans) are your roadmap for success for each customer, outlining the goals, objectives and tasks the CSM and the rest of the account team want to accomplish in any given period (usually quarterly or annually).*

Keep success plans simple (1-2 pages) and focus on executing on fewer, more high impact, objectives rather than many, complex objectives.

The number of Success Plan objectives  
completed in a given time period

## How to Use Metrics to Create a Culture of Customer Success

Measuring each of the metrics above can be overwhelming, even to the most tenured customer success teams. Rather than trying to measure everything all at once (which may cause more harm than good), try selecting 2 or 3 metrics from each category above and put processes and technologies in place to drive insights, actions and outcomes from the metrics. Once you've fully adopted a few metrics, continue to expand your metric map and implement more across your company.

Customer success leaders and executives can learn a tremendous amount about the business as a whole from customer metrics and insights. They can learn how satisfied customers are, the reasons they bought the product in the first place, how to improve the product, or how to enhance the overall customer experience. Learning from current customers and sharing the insights with the rest of the business is the best way to create a culture of customer success.

## About ClientSuccess

ClientSuccess is a customer success management platform that helps companies build relationships that last™. Revolutionizing the way SaaS companies manage, retain, and grow their existing customer base, ClientSuccess provides customer success leaders actionable insights, rich customer analytics, and best practices to proactively manage success throughout the customer lifecycle. ClientSuccess helps SaaS companies increase renewal and expansion revenue, reduce churn, and maximize the lifetime value of the customer.

[clientsuccess.com](https://clientsuccess.com)

## About the CS100 Summit

The CS100 Summit brought to you by ClientSuccess is the premiere customer success conference that brings together top executives, leaders, and innovators in customer success. The CS100 Summit provides customer success executives an exclusive learning environment with like-minded executives in a pristine location to create an atmosphere of inspiration, ideation, strategy, and real-world application around customer success.

[cs100.clientsuccess.com](https://cs100.clientsuccess.com)



## Contributors

Ernie Fontes  
John Huber  
Jedd Peterson  
Michael Santiago  
Brooke Simmons  
Jeron Paul  
Amy Marcantonio  
Brad Pierce  
Jessica McDouall  
Mitch Harris  
Melissa Bell  
Sean Desmond  
Bik Lee  
Brent Peterson  
Nick Chong  
Mark Bissell  
Brandon Brewster  
Lynne Walinsky  
Elizabeth Doherty  
Patrick Woods  
James English  
Richard Guymon  
Lance Davis  
Jeff Moss  
Mitch Macfarlane  
Todd Williams  
Matt Jolley  
Jarin Stevens  
Ursula Llabres  
Katie Rogers  
Anthony Nadalin  
Ted Ruscitti  
Dustin Kenyon  
Katlyn Griffin  
Tom Murphy  
Dave Boyce  
Johnny Wudel

Josh Neilsen  
Ryan Butters  
Becky Denna  
Jeremy Sandstrom  
Andrew Kimball  
Christian Volmar  
John Heiner  
Kacey Tovornik  
Melissa Huelman  
Seth Johnson  
Zack Pike  
Diana Barbadillo  
Sara Carter  
Jerry Fletcher  
Lydia Homan  
Gwendolyn Smith  
Brig Graff  
Jared Olschewski  
Kyle Fraughton  
Todd Smith  
Jeff Cummins  
Ramey Youseff  
Mikael Blaisdell  
Ellie Wu  
Michael Hoy  
Eric Boduch  
Jim Mercer  
Greg Daines  
Sean Pickett  
Jim Kelly  
David Ryan  
Rusty Atkinson  
Emily Hayes  
Heather MacBride  
Megan Heinz  
Burke Alder  
Casey Kleinman

Jonathan Bolton  
Jason Holmes  
Chris Hecklinger  
Suzanne King  
Chris Peacock  
Ryan Voorhis  
Matt Evans  
Nate Jones  
Kelly Jarvis  
Emilia D'Anzica  
Whitney Hillyer  
Irit Eizips  
Laura Julian  
Tiffany Pennycook  
Paulette Greene  
Leanna Resseguie  
Dallen Allred  
Alexandra Harris  
Brandon Neish  
Lisa O'Conner  
Kayla Schroeder  
Jared Rodman  
Laurie Smith  
Jeff Kinzel  
Greg Williams  
Brianna Salinas  
Andrew Dodds  
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