

CUSTOMER SUCCESS LEADERSHIP BOOTCAMP

**ZOOMING INTO THE RIGHT
DATA TO UNCOVER
RISK THEMES TO TACKLE**



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THE GOAL IS TO TURN
DATA INTO INFORMATION
AND INFORMATION
INTO INSIGHTS.

Carly Fiorina
Ex CEO of Hewlett-Packard

client**success**

FIND THE INFORMATION TO TURN TO INSIGHTS

GET ACCESS TO DATA

If you aren't using a Customer Success Management platform, like ClientSuccess, get access to all data.



1

2



MAP THE LIFECYCLE

Understand the milestones and activities you expect a customer to take so you can understand what to dig into.

DEFINE YOUR QUESTIONS

What "things" do you want to know about your customers? Compile these questions and use the data to answer them.



3

4



LOOK FOR THEMES

Once you have your answers it's time to look for themes and patterns to understand what to address at scale.

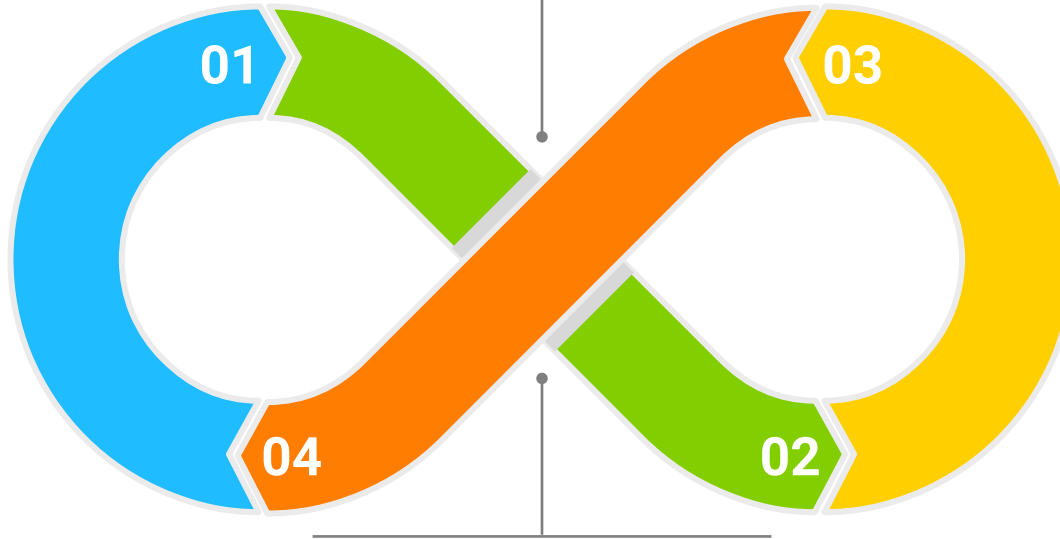
CUSTOMER JOURNEY STAGES

2. EXECUTE

Customer and User onboarding and training.
Assist with strategy and configuration to align with
core use cases. Establish an initial win.

1. ALIGN

Confirm success criteria and
align on measurement of KPIs.
Set proper expectations for the
partnership and establish clear
roles and responsibilities.



3. REALIZE

Customer has adopted
ClientSuccess into their workflow.
Product usage is in line with their
business objectives and they are
working towards their goals.

4. ADVOCATE

Customer has expressed their intention to
renew and/or grow and has agreed to serve
as an advocate for ClientSuccess.

DATA INSIGHTS IN ALIGN



Align:

1. Does the customer align with your ideal customer profile?
2. Are we kicking off within the first 5 days of the partnership?
3. Do we have business goals/objectives for the partnership defined?
4. Do we have an understanding of the key stakeholders in the partnership?

INSIGHTS IN ALIGN



ICP

- 15% of customers do not align with the defined ICP
- Non-ICP customers on average are taking 10% longer to onboard



STARTING ON TIME

- Large customers over \$50,000 ARR start 5-7 days into the partnership
- Starting late results in 2x that time added to onboarding



GOALS DEFINED

- Customers who do not have goals defined during kickoff have a 15% higher chance of churn in year 1
- Customers who do not have KPIs they can measure for their KPIs have a lower adoption rate



KEY STAKEHOLDERS

- Customers with actively engaged Exec Sponsor have a 40% higher adoption rate
- Customers with a CRM admin who maps their data feel 90%+ more confident in the data accuracy

ACTIONS IN ALIGN



ICP MANAGEMENT

- Sales committed to 5% increase in deals closed in line with core ICP
- Internal tracking and communication around customers who are non-ICP
- Modified onboarding experience for non-ICP customers
- Early Exec intervention at 30 days for non-ICP customers



EARLY TIME MANAGEMENT

- Sales to schedule kickoff call with customers at contract signature
- CSMs to block time reserved for kickoff calls for ease of scheduling
- Pre-kickoff prep to support onboarding - send checklist and other required assets day 1



GOAL IDENTIFICATION

- Goal survey sent to customers on day 1
- Goals confirmed at partnership kickoff - onboarding will not commence until goals are clearly defined
- Reconfirm goals at onboarding kickoff and reconfirmed at wrap up
- All goals tracked in Customer Success Management platform



RELATIONSHIP MAPPING

- Sales to assist with mapping the relationship in CRM prior to close
- All key stakeholders required to attend the partnership kickoff
- Exec outreach at 45 days to verify progress and to reconfirm expectation alignment
- CSMs to manage contacts every 30 days to verify correct contacts and manage changes as necessary

DATA INSIGHTS IN EXECUTE



Execute:

1. Has the customer successfully integrated their CRM into ClientSuccess in the first 10 business days? Is data accurate, current and verified?
2. Are core parts of the platform configured meaningfully by the end of onboarding?
3. Has the customer been trained on the administrative backend to leverage independently?
4. Have we completed end user training and enablement?

INSIGHTS IN EXECUTE



DATA INTEGRATION

- Customers who integrate in the first 10 business days have a higher adoption rate in first 6 months
- Trust and reliance on the platform as source of truth results in 90% retention rate



CONFIGURATION

- Customers who properly configure core platform modules have a 75% higher adoption rate than those who don't
- Strong configuration results in 50% higher likelihood of growth in the first year



ADMIN TRAINING

- Admins who are well versed in backend administration result in 60% fewer support tickets
- Trained admins have a higher propensity to leverage advanced use cases in the platform



END USER TRAINING

- End users who are trained within 5 days of launch have a 45% higher adoption rate
- End users who are properly trained early and often have higher login and usage rate on average by 60%

ACTIONS IN EXECUTE



DATA INTEGRATION



CONFIGURATION



ADMIN TRAINING



END USER TRAINING

- Technical sales call to verify all configuration nuances - challenges to be flagged and communicated to CSM and Services teams
- Services Engineer to attend all integration meetings for customers with complex integrations
- Challenges or complications with integrations to be flagged internally and with customer exec immediately for expectation setting
- Create and share best practice and use case templates with customers at the start of onboarding
- Customers lacking predefined strategy for module deployment to be flagged by sales
- Delays in onboarding due to missed configuration deadlines to be flagged internal and with customer exec immediately for expectation alignment
- All admins required to watch all pre-recorded training videos prior to onboarding sessions
- All onboarding sessions recorded for future training and reference for customer
- Ongoing admin training and enablement required for all new product releases
- End User training scheduled at the start of onboarding to avoid delays
- Masterclass webinar trainings shared with admins and end users for advanced use case training
- Ongoing End User training for all new product releases

DATA INSIGHTS IN REALIZE



Realize:

1. Has adoption increased since onboarding and end user training?
2. Are customers increasing licenses or added new modules in the first 12 months of the partnership?
3. Do we have regular engagement with the customer aligned with their designated engagement model?
4. Are we on track and progressing towards the customers goals?

INSIGHTS IN REALIZE



ADOPTION

- Customers who are daily active users of the platform have an 80% increase in goal achievement
- 70% of customers who are regular users of the platform opt into 1 of our advocacy programs



GROWTH

- Customers who increase their investment in the first 12 months have a longer LTV by 50%
- 90% of customers who increase their investment in the first 12 months renew for another term



ENGAGEMENT

- Customers who are actively engaged in the partnership see a faster time to value by 45%
- Customers who are not actively engaged in the partnership only have a 65% chance of renewing



VALUE REALIZATION

- 95% customers who define and achieve their goals renew and 30% commit to a multiyear term
- Customers who do not define and achieve their goals only have a 70% chance of renewing

ACTIONS IN REALIZE



ADOPTION



GROWTH



ENGAGEMENT



VALUE REALIZATION

- Track usage and adoption as the majority weighted factor in the customer health score
- Set up alerts for decreases in adoption and usage over a 2-week period
- Establish weekly training and enablement workshop webinars for collaboration with peers
- Design and distribute new product adoption content around low used and adopted features/modules
- Establish and track growth criteria with customers post onboarding
- New product launch campaigns to target appropriate customers for upsell potential
- Product Launch webinars to help articulate the possibilities and advanced use cases
- Customer stories to document successes on various products
- Educate customers on engagement in partnership kickoff
- Establish recurring cadence during post onboarding wrap-up
- Monitor engagement as a health score metric
- Establish alerts for customers with decreased engagement
- Provide alternative engagement options - asynchronous, community, zoom, chat etc.
- Establish and track all customer goals prior to partnership kickoff for customers in year 1
- Launch an internal campaign with CSMs to define customer goals prior to the start of 2023
- Confirm goals with customers during following engagement
- Track all newly identified goals in the platform for tracking and monitoring

DATA INSIGHTS IN ADVOCATE



Advocate:

1. What % of customers have opted into one of our advocacy program options? Which program generates the most interest?
2. What % of customers and which customers have provided feedback in the past 6 months?
3. What are the 3 common churn reasons and 3 highest retention reasons in the customer base?
4. What % of customers renewed with a multi-year subscription?

INSIGHTS IN ADVOCATE



ADVOCACY

- 30% of customers opted into an advocacy program with the beta program having the highest # of participants
- Only 20% of customers who expressed interest in a speaking engagement, spoke



VOC

- 60% of customers shared feedback via a formal program over the past 6 months
- 85% of those who participated are active users of the platform and engage in the partnership



REASON MAPPING

- Top 3 reasons customers stay - thought leadership, product alignment and innovation, partnership
- Top 3 reasons customers churn - Business viability, product innovation, failure to launch



MULTI-YEAR

- 30% of customers who renewed this year, renewed with a multi-year commitment
- Customers who committed to a multi-year had high adoption, engagement and strong leadership/strategy

ACTIONS IN ADVOCATE



ADVOCACY



VOC



REASON MAPPING



MULTI-YEAR

- Launch a quarterly campaign targeting satisfied customers promoting the advocacy program options and allow them to opt-in
- Set quarterly targets to leverage advocates who expressed interest in speaking opportunities - establish monthly webinar series
- Establish a CAB-lite to allow customers who expressed product interest to have regular engagement with product around the roadmap and launches
- Launch specific VOC campaigns at various stages in the partnership to solicit feedback from customers about the partnership
- Capture and disseminate feedback provided by customers in non-traditional forums - customer calls, emails etc.
- Quarterly business newsletter to all customers communicating business updates, changes, direction etc.
- Increase thought leadership content - monthly leadership roundtables, regular webinars showcasing other leaders, CS for CS showcase
- Product Roadmap “tours” - bring customers into a behind the scenes design and development of the roadmap
- Track product enhancements that are prohibitive and tied to risk - integrate into the roadmap and establish monthly communication
- Shift all subscriptions to a 2 year subscription default - all alternative options available for discussion
- Design incentive programs for multi-year subscription options - empower frontline teams and drive a program that is mutually beneficial
- Leadership coaching for leaders who are struggling with strategy and program design for their businesses

DATA MISTAKES TO AVOID

1.

**DON'T FUDGE
THE DATA**

2.

**DON'T GET
FRUSTRATED,
USE WHAT
YOU HAVE
ACCESS TO**

3.

**DON'T BITE
OFF MORE
THAN YOU
CAN CHEW -
BABY STEPS**

4.

**DON'T DO IT
ALONE -
ALLOW
OTHERS TO
TAKE
OWNERSHIP**

5.

**DON'T WAIT -
THERE IS
NEVER A
GOOD TIME**

THANK YOU