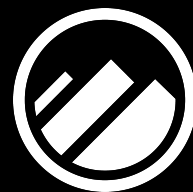




JULIE PERSOFSKY



PARTNER
WINNING BY DESIGN



Driving Productivity in Customer
Facing and Performance Driven Roles



CUSTOMER FACING & PERFORMANCE DRIVEN ROLES

PRODUCTIVITY

WINNING BY DESIGN JULIE PERSOFSKY



*The success of companies is determined by their ability to realize the **impact** Customer Success teams have on **driving revenue**.*

STORYBOARD



SYMPTOMS



SCIENCE



WHAT



HOW



WHY



SYMPTOMS

*a sign of the existence of something,
especially of an undesirable situation*



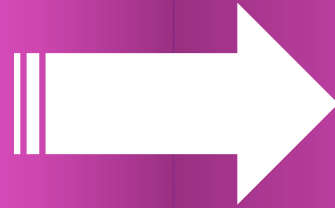
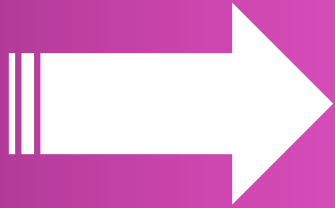
#

1

*“Our impact on the business
is misunderstood.”*

LAND

EXPAND



COMMIT



#

2

“What we do in CS has not changed but client demands have changed significantly.”

[Redacted]

Inbox x



[Redacted]

[Redacted]



[Redacted]

[Redacted]

[Redacted]

In full visibility, we were told in early May with great enthusiasm that they are looking to renew with us with double the numbers and then suddenly late June they came back and told us that they decided not to. There wasn't much clear communication on what made them change their mind and we could not get them on a call to learn more.

[Redacted]



#

3

*“People think the act of
selling is breach of trust”*



SYMPTOMS

1
“The Impact
of CS is mis-
understood”

2
“What we do in
CS has not
changed but
client demands
have”

3
“People think
the act of
selling is a
breach of trust”

STORYBOARD



SYMPTOMS



SCIENCE



WHAT



HOW



WHY



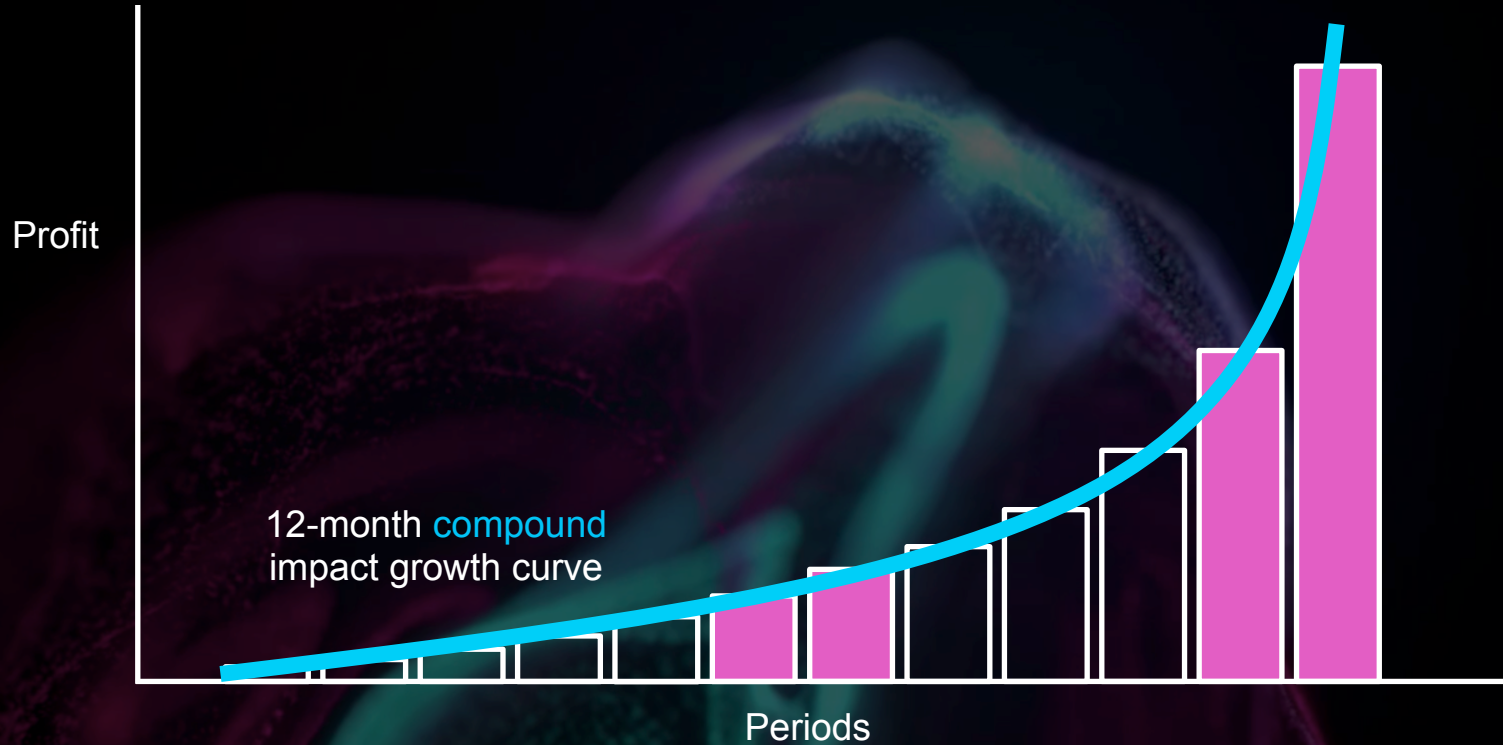
SCIENCE

*the intellectual and practical activity
encompassing the systematic study of the
structure and behavior through observation
and experiment.*

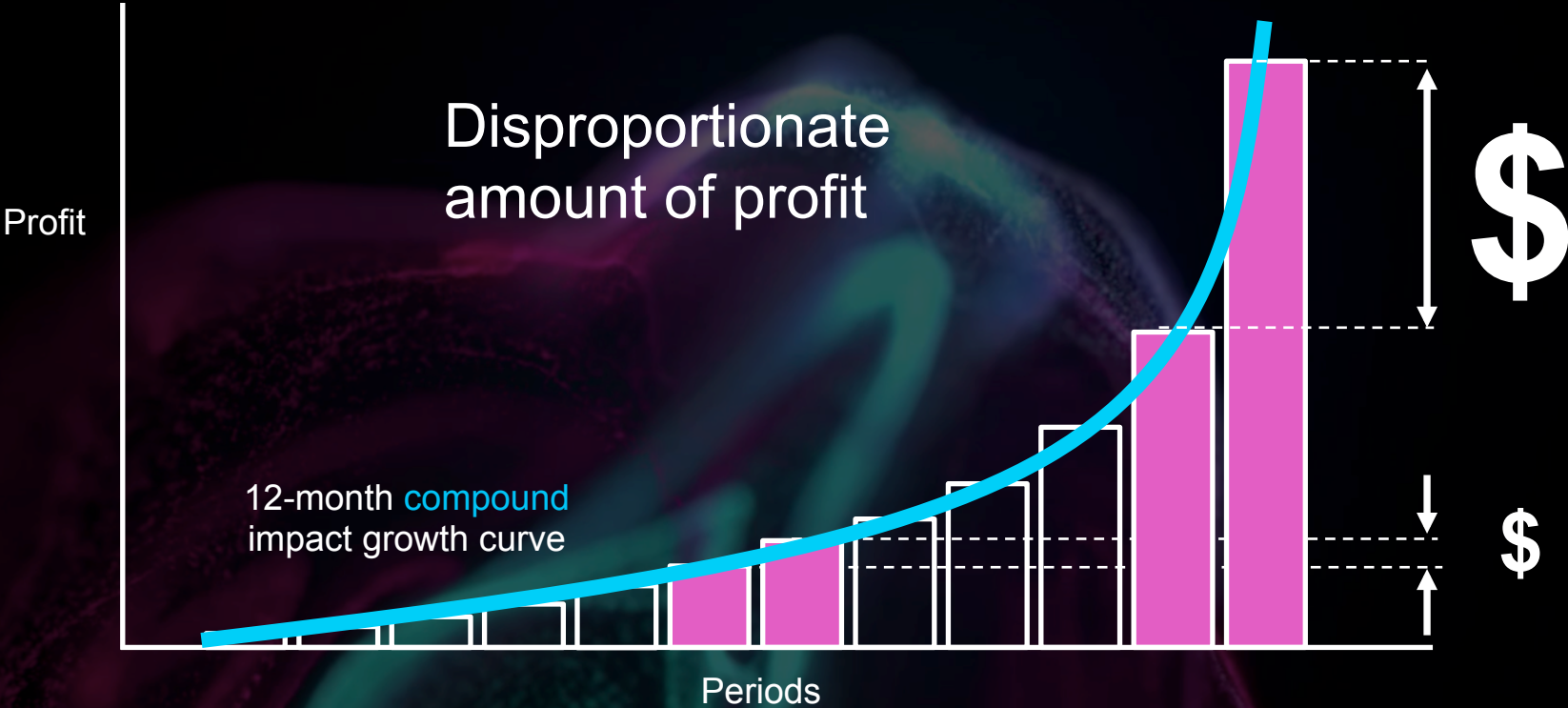
GROWTH FORMULA

$$\text{MRR} \times (\text{CHURN} + \text{UPSELL}) \times \text{PERIODS}$$

GROWTH FORMULA



GROWTH FORMULA



GROWTH FORMULA

MRR x (CHURN + UPSELL)

PERIODS

GROWTH FORMULA

MRR

Sales

x

(CHURN + UPSELL)

Customer Success

PERIODS

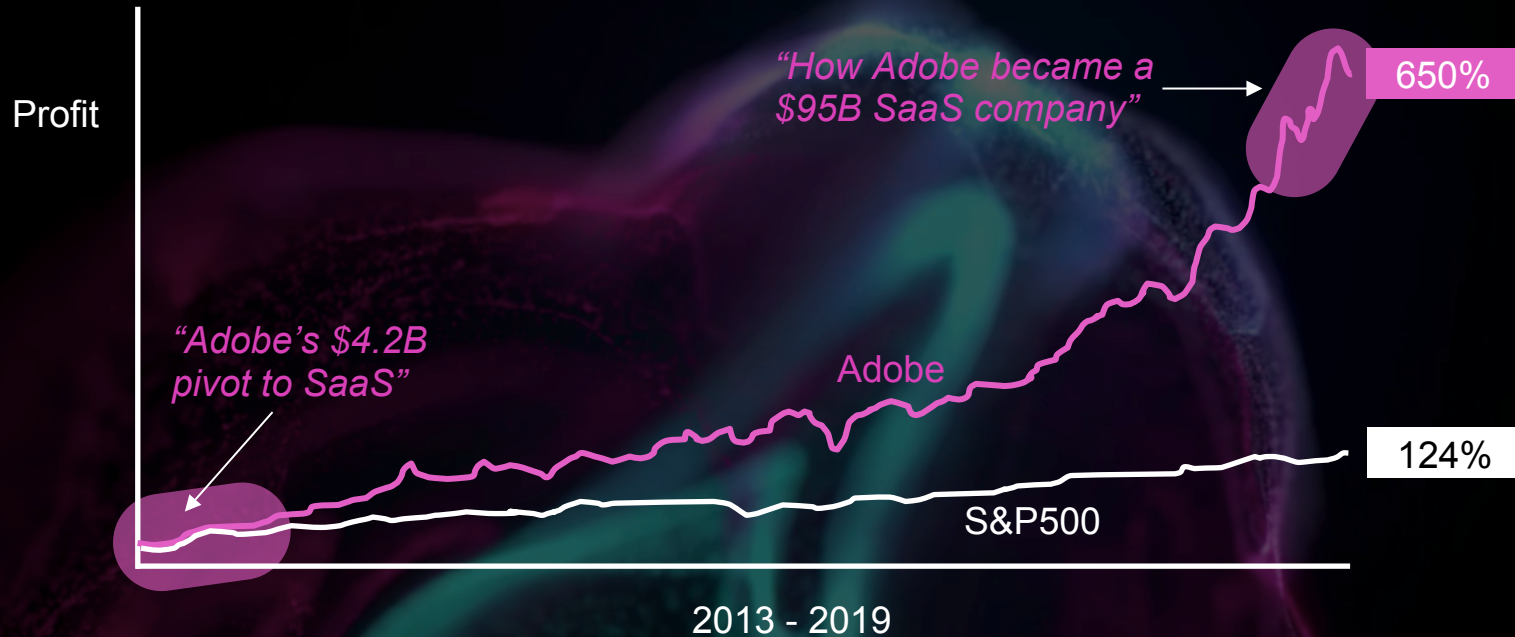
Customer Success

GROWTH FORMULA

$$X^y \text{ PERIODS}$$

SMALL
IMPROVEMENT

GROWTH FORMULA



STORYBOARD



SYMPTOMS



DIAGNOSIS



WHAT



HOW



WHY



WHAT TO DO

MAGIC CASTLE HOTEL



LOS ANGELES

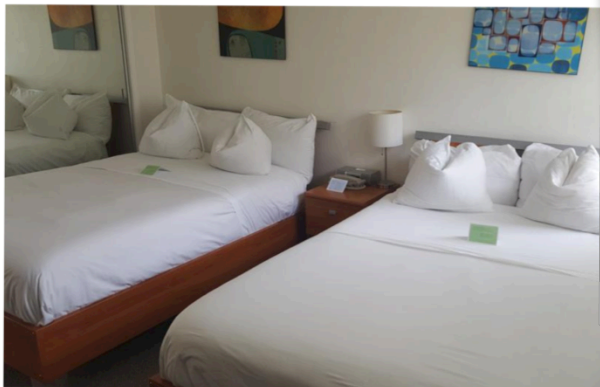


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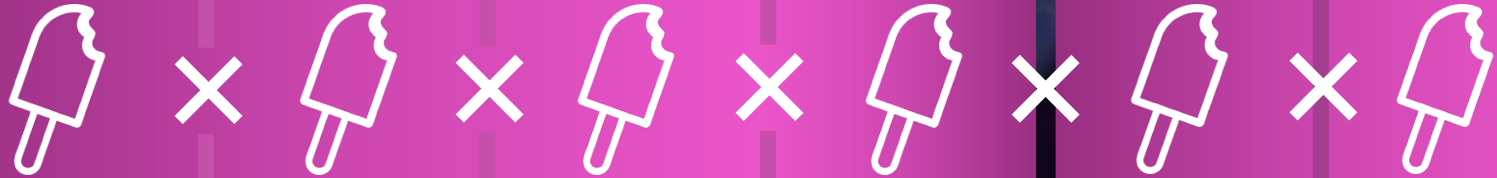




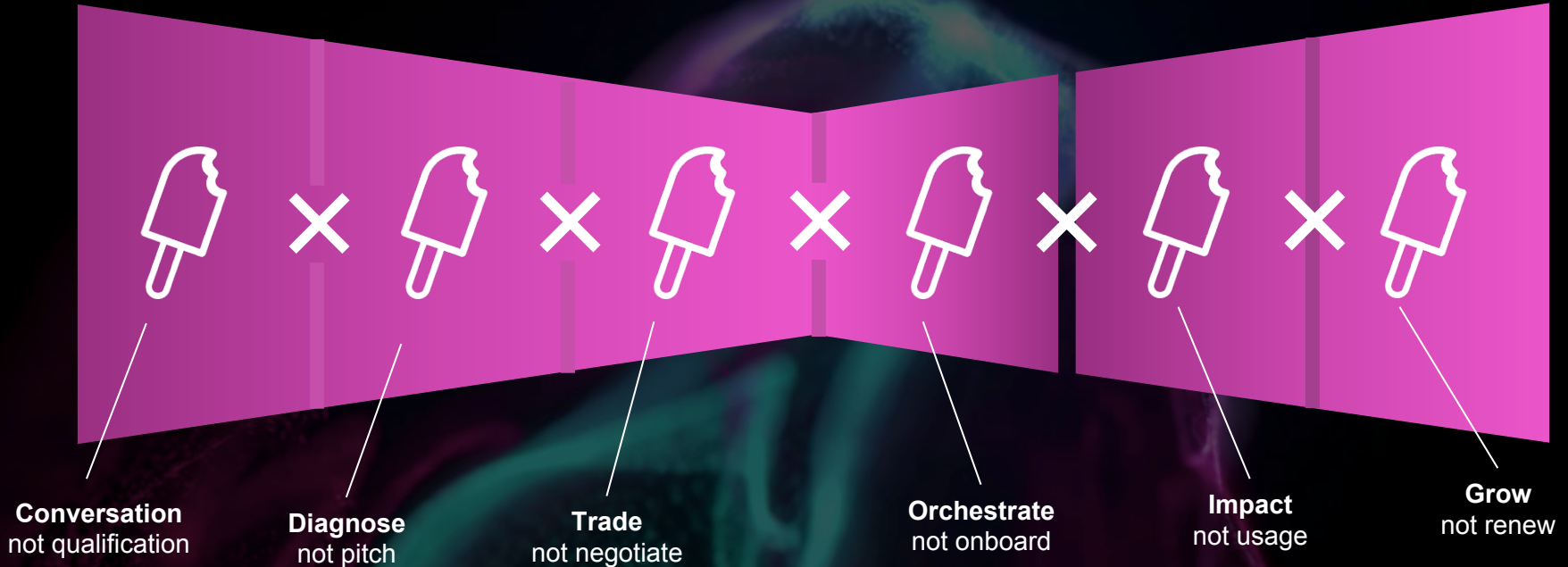
MAGIC CASTLE HOTEL



FOCUS ON THE
MOMENTS THAT MATTER



FOCUS ON THE MOMENTS THAT MATTER



FIND YOUR

POPSICLE

MOMENTS

STORYBOARD



SYMPTOMS



DIAGNOSIS



WHAT



HOW



WHY



HOW TO DO IT

through the use of process



““

One must look at errors as consequences rather than causes, having their origins not so much in the perversity of human nature as in upstream systemic factors. These include processes that give rise to them.

James Reason
Professor Emeritus of Psychology
University of Manchester

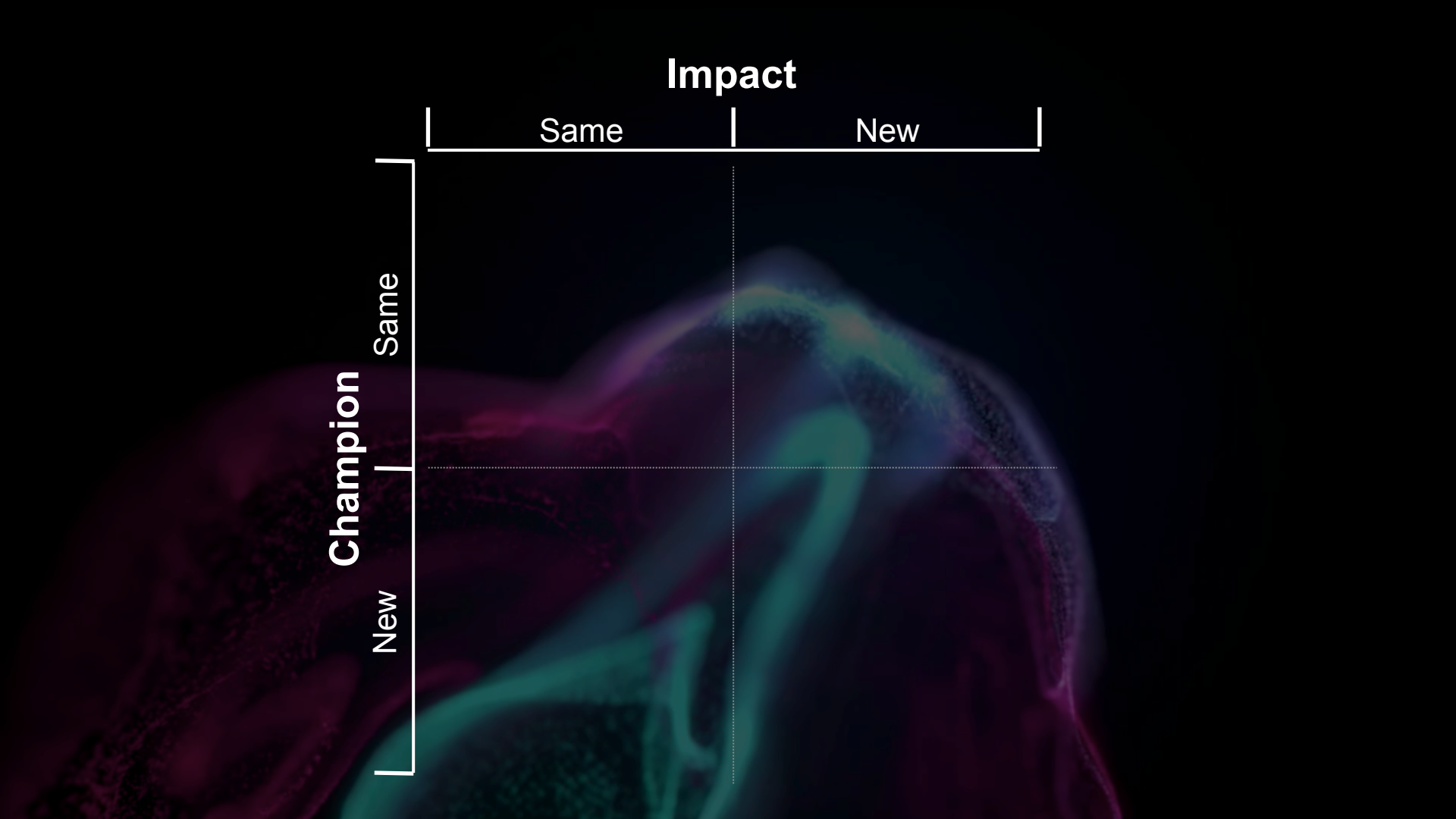
Impact

Same

New

Same
New

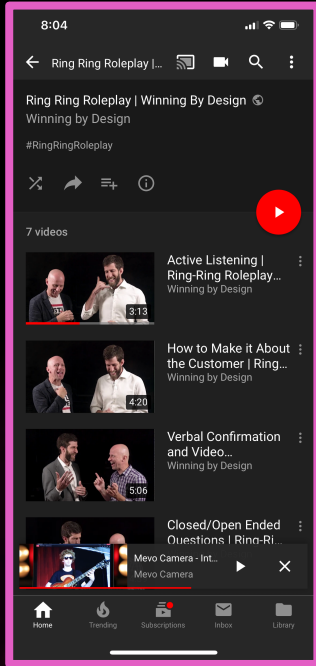
Champion



Impact

		Same	New
Champion	Same	<p>Renew Same Impact</p> <ul style="list-style-type: none">+ Early renewal+ Payment terms+ Contract terms	<p>Upsell More Impact</p> <ul style="list-style-type: none">+ New features+ More usage+ Additional seats+ Longer contract
	New	<ul style="list-style-type: none">+ New group or dept+ Entire company+ Local support <p>ReSell Impact Everywhere</p>	<ul style="list-style-type: none">+ Unseat competitor+ New languages+ New product launch <p>Cross Sell Identify New Impact</p>

IMPORTANCE OF BEST PRACTICES



100+ videos available @ www.youtube.com/winningbydesign

STORYBOARD



SYMPTOMS



DIAGNOSIS



WHAT



HOW



WHY



WHY WE DO IT

Internal and external factors that stimulate desire and energy in people to be continually interested and committed to a job, role or subject, or to make an effort to attain a goal.



MONEY

HAS NEVER
BEEN *THE MAIN*
MOTIVATOR



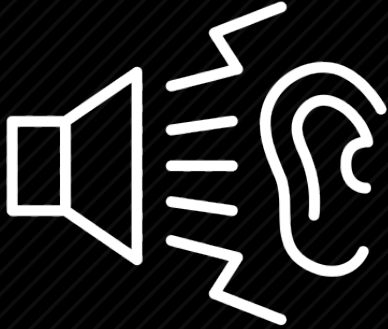
NEITHER IS **COFFEE**



NOPE NOT **TOYS**



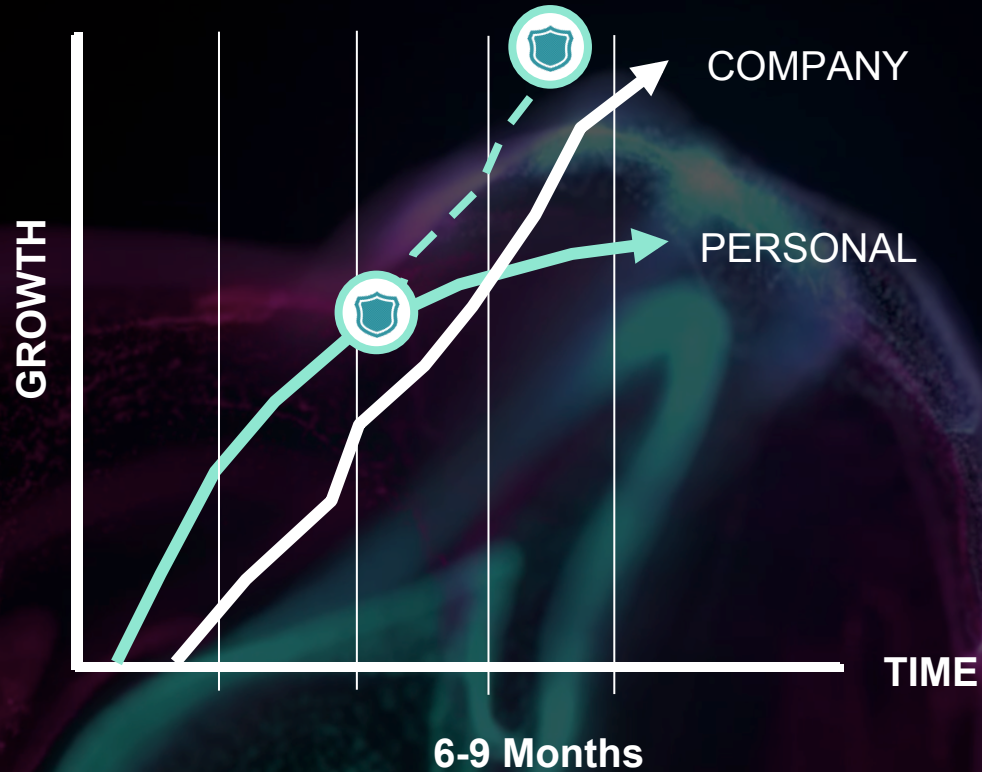
NOT EVEN **OPEN WORK SPACES**



Instead



CAREER DEVELOPMENT



CAREER DEVELOPMENT

1. Customer Success Skills

What do we need to know to do our job better?

2. Product Knowledge

How does our product work?

3. Market Knowledge

Who are our customers? What do they think about?

STORYBOARD



SYMPTOMS

MisUnderstood

No Change

No Selling



SCIENCE

Compound Effect

Big Impact



WHAT

Focus

on a few

Key Moments



HOW

Process

to drive

Results



WHY

Career

Development

CUSTOMER FACING & PERFORMANCE DRIVEN ROLES

PRODUCTIVITY

WINNING BY DESIGN JULIE PERSOFSKY



CS100SUMMIT

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client**success**