



# CS100SUMMIT

Presented by

client**success**



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Chief Customer Officer,  
Swiftly

## **Building Customer Success Career Paths**



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# About Me

- Chief Customer Officer at Swiftly
- Retired Human Resource Leader
- Startup addict - this is my 7th startup!
- 3 exits and a couple of failed startups
- Alumni of Lending Club (unicorn),  
HelloSign (acquired by Dropbox)
- Podcast Host of From There to Here
- SuccessHacker Top 25 Customer  
Success Influencer for 2021
- SmartKarrot Top 50 Influencer for 2022





**How many of you have had employee turnover in the past 6 months?**

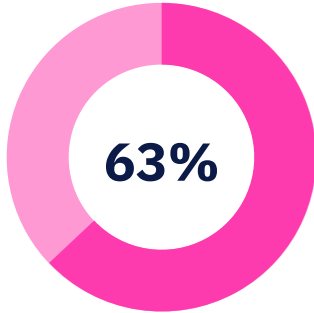


# Which of these three things does our teams care about the most?

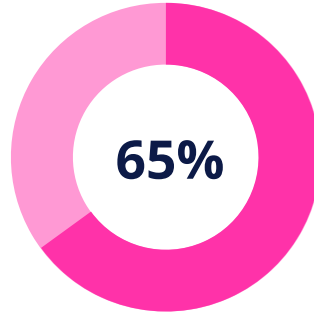
- Making more money.
- Having a clear path for growth and development and an understanding of how to achieve title promotions.
- Having a flexible work environment.



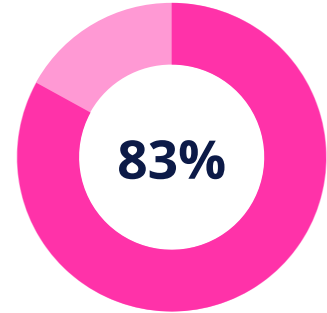
# The Results Are In



**YES, I AM LOOKING  
FOR A NEW JOB**



**MY COMPANY DOES NOT  
HAVE A  
CAREER/GROWTH PATH**



**A GROWTH PATH IS  
IMPORTANT TO ME**

**\*874 responses**







# Team Member Growth = Smart For Business

**Successful Teams = Successful Customers = Successful Business**

- 86% of professionals would change jobs if a new company offered them more opportunities for professional development.\*
- Employees with professional development opportunities are 15% more engaged.\*
- Employees with professional development opportunities have 34% higher retention\*



\*sources: BetterBuys, HBR, The ExecuSearch Group

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# More Benefits

- Hiring is expensive!
- Promoting internally is great for morale and the bottom line
- Having defined paths gives team members a north star.
- Can be a great tool for performance related conversations.



**Now What?**

# CSM Journey



## RECRUITING

- Marketing your company
- Looking for mutual fit
- Exploring the partnership



## HIRED

- Sold!
- Honeymoon period starts



## ONBOARDING

- Intro to team and culture norms
- Still honeymoon period
- Learning, adapting, change management, all of the fun things!



## GROWTH

- Exits honeymoon period
- Sees imperfections and decides to stay bought in or move to a new company.
- Most crucial time for retaining team members.



## CONTINUED EMPLOYMENT

# Double Click Into Growth



# My Growth Goals For My CS Team

- Everyone in the CS Org has growth and development opportunities, whether it's in the CS Org or elsewhere in the company.
- Everyone in the CS Org has access to the information they need to be successful.
- Everyone in the CS Org has a clear understanding of what's expected of them, their goals, and the levers they have available to move those goals forward.
- Everyone knows where they are in the competency matrix and is having monthly growth and development conversations with their manager.
- We are doing activities that drive impact, not just output.



# Four Key Areas

- Salary Bands
- Competencies: What needs to happen to progress in their current role/department
- What are the potential progression paths?
- Organization vision map





Level	Level Description	Customer Success Team	Implementations Team	Technical Support Team	Customer Success: Leadership
10	CCO/SVP				<b>M10: CCO</b>
9	Vice President				<b>M9:</b>
8	Senior Director				<b>M8:</b>
7	Expert 2/Director				<b>M7: Director</b>
6	Expert/Senior Manager				<b>M6: Senior Manager</b>
5	Advanced 2/Manager	<b>P5: Principal/Strategic Customer Success Manager</b>			<b>M5:</b>
4	Advanced/Entry Manager	<b>P4: Senior Customer Success Manager</b>	<b>P4: Senior Implementations Manager</b>	<b>P4: Lead Technical Support Engineer</b>	<b>M4: Manager of Customer Success, Manager of Renewals, Implementations Team Manager</b>
3	Career/Team Lead	<b>P3: Customer Success Manager</b>	<b>P3: Implementations Manager</b>	<b>P3: Senior Technical Support Engineer</b>	<b>M3: Supervisor</b>
2	Developing	<b>P2: Customer Success Associate</b>	<b>P2: Implementations Associate</b>	<b>P2: Technical Support Engineer</b>	<b>M2: Team Lead</b>
1	Entry				



# Competencies

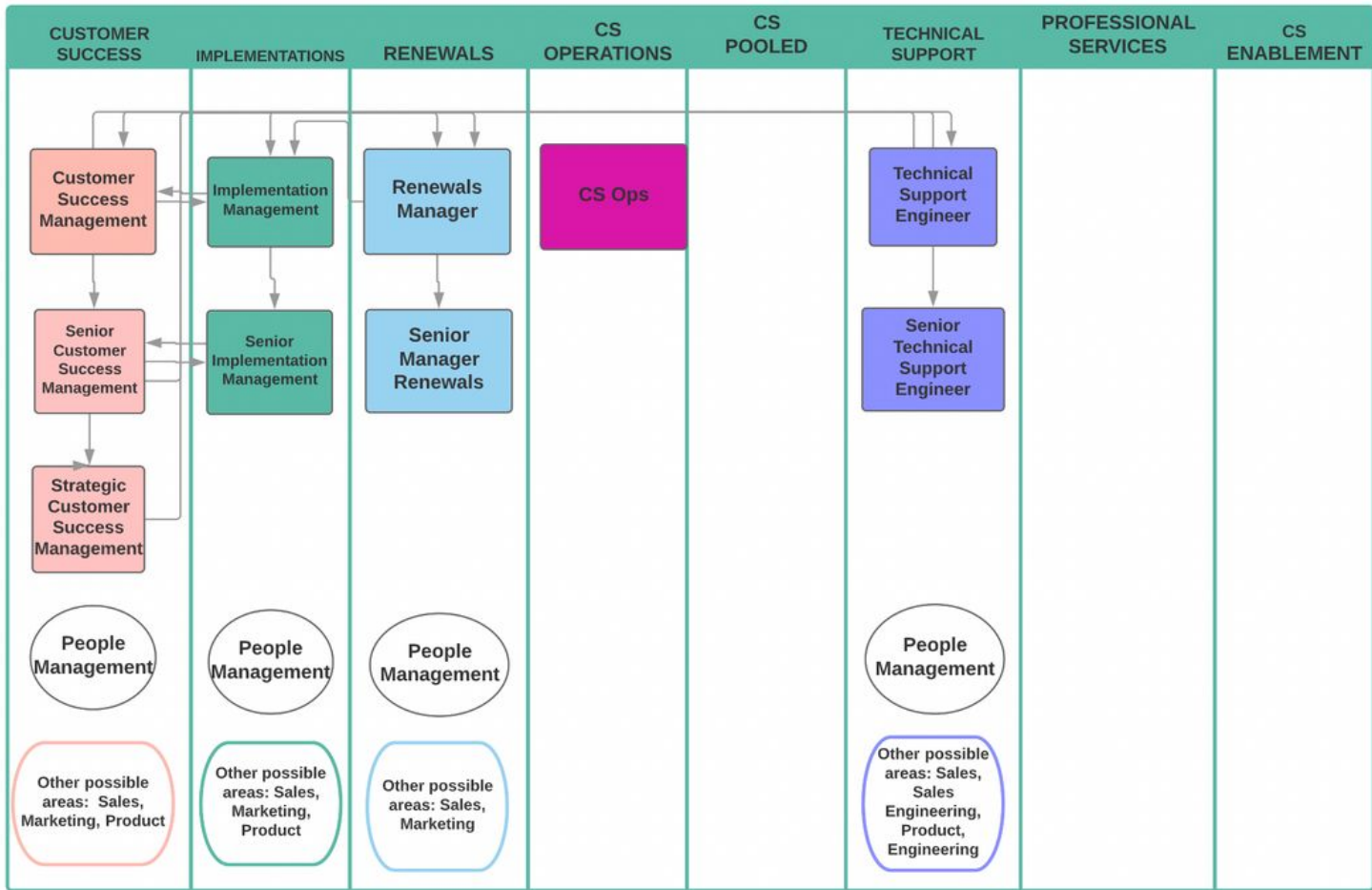
- Map out career progression at a high level
  - How to go from Manager to Director
  - What is expected from a Director vs a VP
- Identify what skills are important for success within the CS Org and use them to create your competencies. Examples:
  - Technical skills
  - Soft skills
  - Execution and results
  - Continuous improvement/change management
  - Decision-making/problem solving



		A manager's output = the output of their organization + the output of the neighboring organizations under their influence. -			
Overview of Career Progression		Individual	Manager	Director	VP
Business Performance	Strategy & plans	Plan 1 week in advance and reliably execute; tactical execution	Strategy & plan for 1-3 months in advance and reliably execute; some tactical execution.	Strategy & plan 6 months - 1 year in advance and reliably execute; light tactical execution	Strategy & plan 1-3 years in advance and reliably execute; limited tactical execution
	Performance Metrics	Perform to metrics set	Partner with Director to align on key metrics. Empower team perform to metrics set. Proactively report progress to manager.	Propose key metrics with VP and align. Empower team perform to metrics set. Proactively report progress to manager	Propose key metrics to manager and executive team and align. Empower team perform to metrics set. Proactively report progress to manager and executive team
	Operational Effectiveness	Manage workflows / process for personal effectiveness	Manage workflows / process for team effectiveness	Manage workflows / process for team & cross departmental effectiveness. Proactively identifies gaps to optimize on company and team level.	->
	Budgeting & Resource Allocation	Executes within budget	Executes within budget to hit results - including people, vendors and tools	Own department budget and forecasting. Proactively advocate for resources to achieve goals. Constantly evaluate effectiveness of all resources (vendors, tools and team) and make adjustments  Build mechanism for tracking and proactively sharing budget with manager	->



A	B	C	D	E
Customer Success - IC Pathway				
Category	Customer Success Associate P2	Customer Success Manager P3	Senior Customer Success Manager P4	Strategic Customer Success Manager P5
Execution & Results	Utilizes listening, prioritization, and communication skills to maintain and grow customer relationships	Drives software and service renewals across multiple customer accounts	Ability to manage multiple accounts of high complexity and maintain relationships with multiple points of contact in one company, often simultaneously	Ability to manage almost exclusively accounts of high complexity and maintain relationships with multiple points of contact in one company, often simultaneously
	Contributes to project and resource planning within assigned areas of responsibility	Ability to establish themselves as an expert in the product and trusted mentor over a diverse customer portfolio	Demonstrates excellent customer service skills with proactive communication, applying internal resources, escalation, and resolution processes for critical customer issues	Informed on the latest trends in Customer Success techniques and information; experiments with new techniques
	Solid knowledge of transportation industry and the Swiftly platform	Accomplishes results that meets or exceeds company and customer expectations	Deep knowledge of transportation industry and the Swiftly platform	Expert knowledge of transportation industry and competitive landscape
	Ability to utilize tools to track and measure success of activities	Very strong knowledge of transportation industry and the Swiftly platform to a level that increases trust from stakeholders	Proactively investigates alternative approaches, tools, or partnerships	Exceptional communication skills; proactively manages customer relations to anticipate issues before churn is imminent
	Delivers results on time and within defined scope, meeting designated success criteria with direction and guidance	Demonstrates strong communication skills with customers		Ability to influence with diplomacy
Decision Making	Ability to achieve most tasks using own judgment	Applies deep knowledge of the customer and of Swiftly priorities in decision-making	Anticipates bottlenecks, provides escalation management, anticipates and makes tradeoffs and balance business needs against technical constraints to meet committed timelines	Gains input from cross-functional leaders to make informed decisions
	Ability to discern when a solution is sufficient to progress to the next stage	Ability to draw upon knowledge of industry standards in determining objectives and approaches to critical support questions and assignments	Ability to listen to multiple points of view and evaluate merits of multiple solutions to problems	Understands full scope of Swiftly's vision and is able to reflect that in their work
	Ability to learn and adapt in a fast paced environment	Determines methods and procedures on new project and may influence and lead projects amongst their peers	Takes full responsibility and ownership of work	Heavily involved in Customer Success strategy, including communicating solutions to other teams and stakeholders
	Utilizes best practices and processes provided whilst making personal adjustments to achieve greater results			
Problem Solving	Ability to solve problems on own and proactively request assistance from managers when needed	Ability to navigate expected obstacles without challenge; vague or unexpected obstacles with limited manager support	Anticipates problems and easily navigates to a resolution	Ability to access financial and organizational implications of a project activity or suggestion within Swiftly
	Ability to uncover and translate customer pain points	Ability to uncover customer pain points and suggest the appropriate solutions/product fit to ensure high levels of retention	Resolves vague problems with little to no information, established process, or standard, uses available tools	Develops and implements contingency plans in anticipation of technical and operational challenges
	Assists with identification of potential process improvements		Partners with other teams to troubleshoot/ determine resolution for complex issues across team domains	
	Utilizes best practices to tackle common problems			



# Getting Started

- Something is better than nothing
- Don't over complicate this
  - Think through:
    - Core competencies for success on your team
    - What do levels look like?
    - What does progression look like and how does someone know if they are ready for promotion?
- Don't forget the salary bands
  - Partner with your HR partner on this!
- Show growth paths to other areas in your company
- Don't forget your vision map!

Questions?

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