



CS100SUMMIT

Presented by

client**success**



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Scaling Customer Success

**“Getting it out of your head and into
Outcomes”**



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SmartVault 

Integrated document management and client portal system that empowers businesses and their clients to work better together.

**7000
Businesses**

**2 Million+
Users**

**\$15 Million
ARR**

**30 members in the
Customer Success Organization**



***“GETTING IT OUT OF YOUR HEAD AND INTO
OUTCOMES”***

PROCESS

Process Definition

A series of actions or steps taken in order to **achieve a particular end.**



Process Definition

***To get to your vision you must
understand the business goals and
where you are in your growth journey***



What's Your Vision?

How are you going to drive outcomes for your customers?

How are you going to drive growth for your company?

How will your team culture promote success?



Process

Gather Data

- *Talk to Customers*
- *Poll Your Customers*
- *Talk to your Organization Members*
- *Review NPS and Churn Data*



Results?

- ***“I haven’t heard from SmartVault since I purchased it 3 years ago.”***
- ***“I still don’t know how to use this product”***
- ***“Nick, once I sell it, I have to spend an hour on a call training the customer on how to setup and use it”***
- ***Less than 10% of new customers we formally onboarded***
- ***#1 Churn Reason and Detractor Reason – Product is hard to use***



Process - People - Technology

OUR MISSION STATEMENT

**EDUCATE EVERY CUSTOMER
THROUGH EVERY INTERACTION.**

Business Impact Analysis:

- What am I solving and why?
- What impact will it have on the business?
- How quickly should we expect to see outcomes?
- How much will it cost?
- How does this fit in our Customer Success Vision for Scale?
- What happens if we don't do anything? (Churn, Team, LTV, NRR, NPS)



Process - People - Technology

OWN YOUR SCALE VISION

EVANGELIZE

EDUCATE

EXPLORE

WHAT'S THE POINT?

*Your process starts with you understanding your **END** goal*

Gather data and work alongside your leadership to get the vision right

Share it with the organization and build the buzz about the scale plan

PEOPLE

People Definition

The foundation of your customer success scale plan and **the key to your success as a leader.**



Process - **People** - Technology

HOW DO I BUILD THE RIGHT TEAM?

✓ **Right Person**

✓ **Right Seat**

✓ **Right Person**

✗ **Wrong Seat**

✗ **Wrong Person**

✓ **Right Seat**

✗ **Wrong Person**

✗ **Wrong Seat**

✘ Wrong Person

✘ Wrong Seat

- The employee doesn't perform to their best ability, misses deadlines, and fails to meet expectations
- They create extra work for their co-workers
- They don't share your core values
- They aren't team players

Solution: Move on from the employee



*Process - **People** - Technology*

✓ Right Person

~~Wrong Seat~~

- The employee shares your values and is liked by their co-workers
- Believes and is committed to the vision
- Their current role is either too big or too small for them

Solution: Get them to the right seat through promotion or internal movement



Process - **People** - Technology

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✘ Wrong Person

✔ Right Seat

- High-Level Performer
- Lacks the company and team culture
- Breeds dissension within the organization
- Not aligned with the company vision

Solution: Move on from the employee



Process - People - Technology

✓ Right Person

✓ Right Seat

- They share your core values and represent them daily
- They add to the culture and are excited to generate growth and scale
- They don't create extra work for others
- It's not just a job; they love what they do

Solution: Pour into them and find ways to grow their careers



Process - People - Technology

WHAT'S THE POINT?

Get the Right People in the Right Seat

Constantly evaluate your talent and place them in the appropriate section

Don't delay in making a decision on who is in your organization

TECHNOLOGY

Technology Definition

The accelerator to scale.



**Artificial Intelligence is the
future of Customer Success
and is a key to scale.**



*Process - People - **Technology***

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**Understand
the problem
AI will solve**



**Prepare to
train the AI**



**Test
Internally**



**Congratulate
and share
success**



*Process - People - **Technology***

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Process - People - **Technology**

WHAT'S THE POINT?

Artificial Intelligence is the future of Customer Success

Find where AI can improve and support your human interactions

Don't get left behind in the AI movement

REMEMBER THIS.....

- The **PROCESS** starts with you understanding your **END** Goal!
- Build a Team of the **Right People** in the **Right Seat**
- AI Technology is the way off the future.. **JUST GET STARTED**



Process - People - Technology

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