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Scaling Customer Success

"Getting it out of your head and into Outcomes"



SmartVault 12

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

7000 Businesses

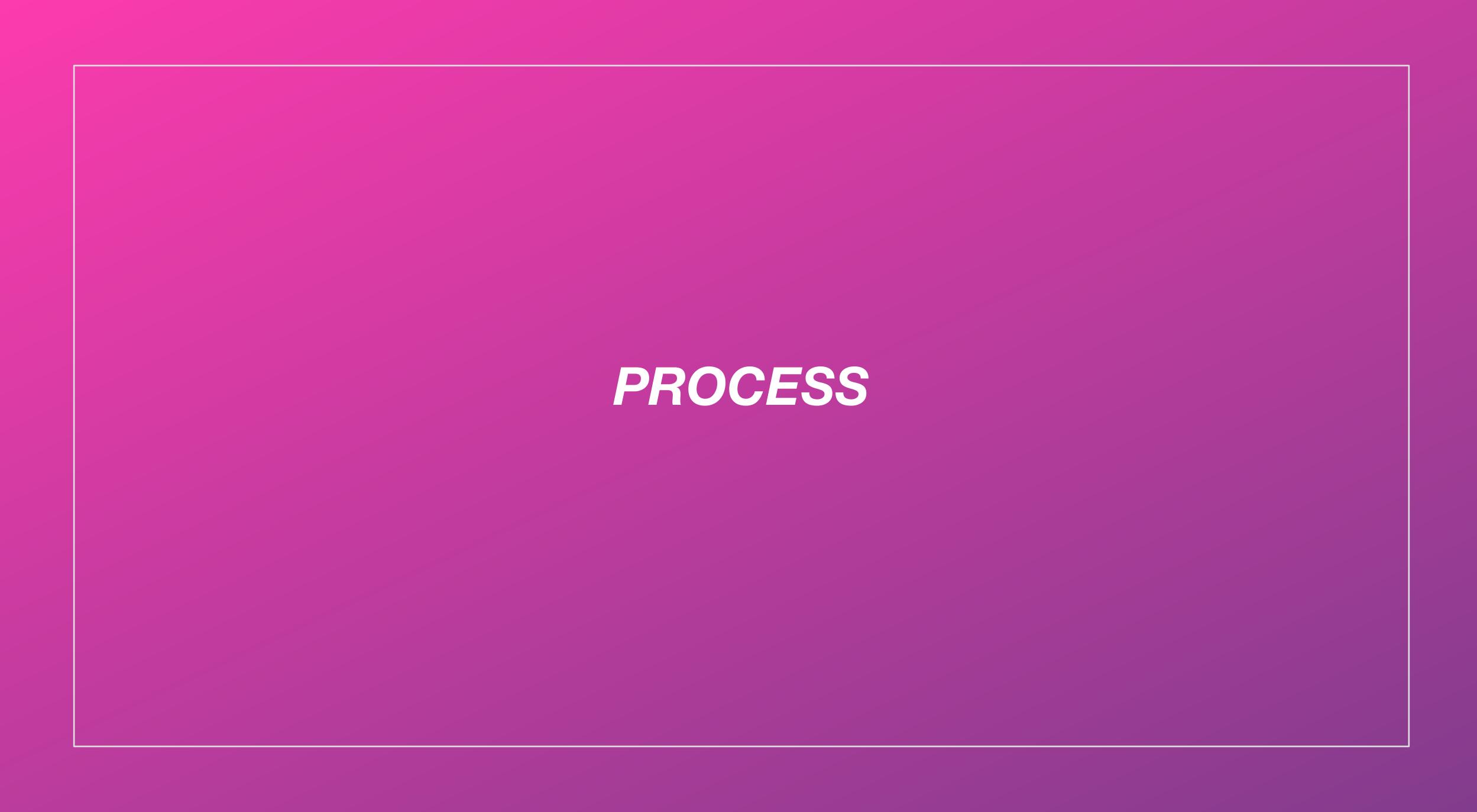
2 Million+
Users

\$15 Million
ARR

30 members in the Customer Success Organization



"GETTING IT OUT OF YOUR HEAD AND INTO OUTCOMES"



Process 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



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)



OWN YOUR SCALE VISION

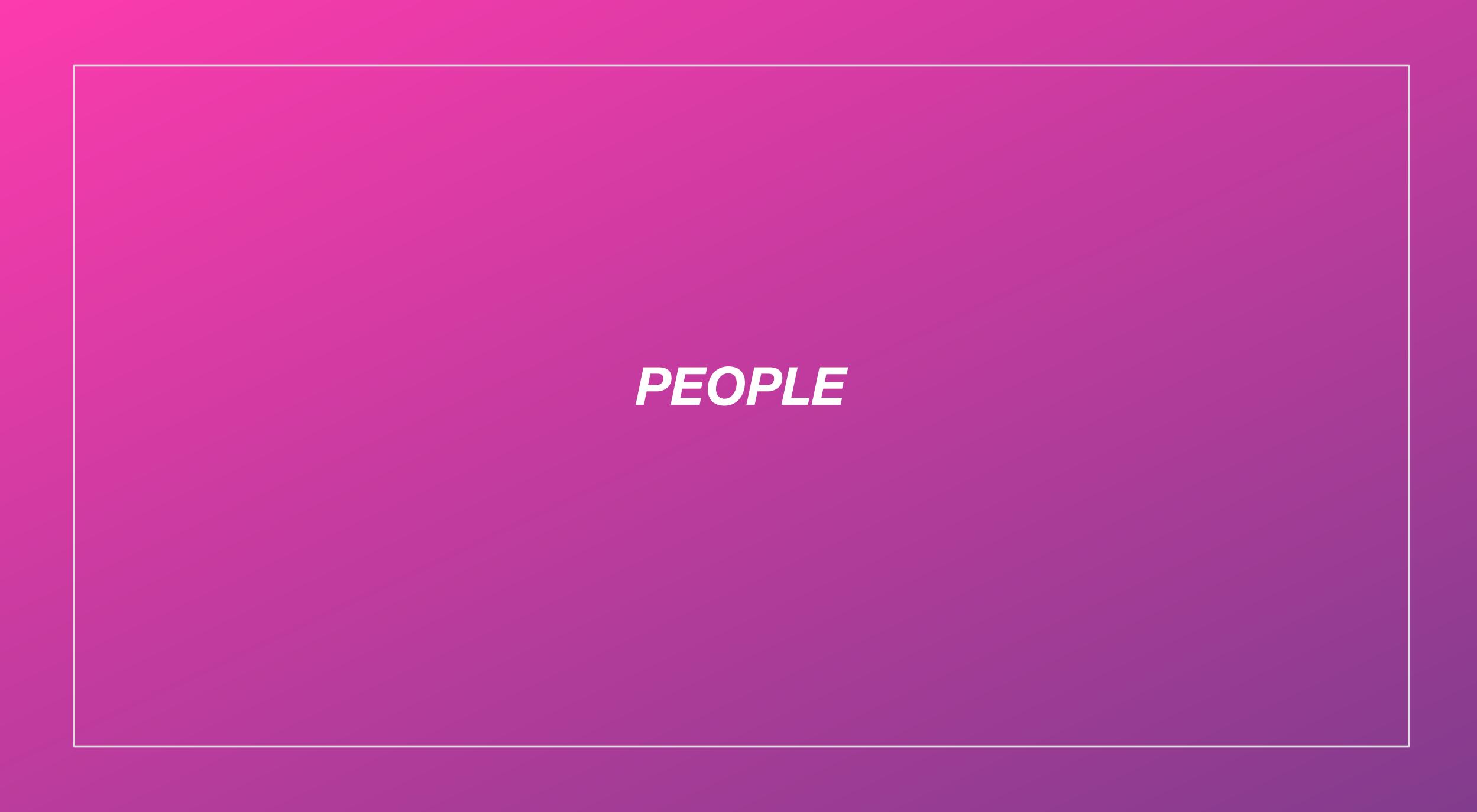
EVANGELIZE EDUCATE EXPLORE

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 Definition

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



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



- 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







- 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



Wrong Person



- 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







- 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 Definition

The accelerator to scale.



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



Process - People - **Technology**



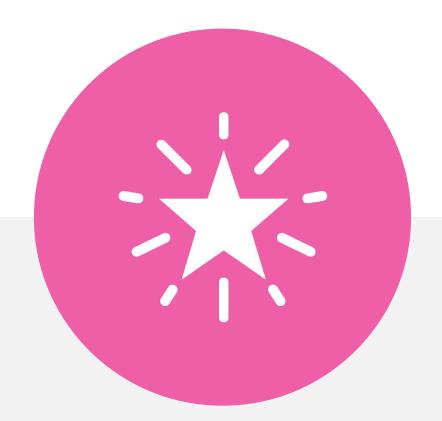
Understand the problem Al will solve



Prepare to train the Al



Test Internally



Congratulate and share success



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 Al movement

REMEMBER THIS.....

The PROCESS starts with you understanding your END Goal!

Build a Team of the Right People in the Right Seat

Al Technology is the way off the future.. JUST GET STARTED



Process - People - Technology

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