

CUSTOMER SUCCESS LEADERSHIP BOOTCAMP

**DESIGNING A SUCCESS
PROBABILITY SCORE
TO PREDICT
CUSTOMER SUCCESS**

TUESDAY, FEBRUARY 7, 2023
1PM EST/ 10AM PST



KRISTI FALTORUSSO

Chief Customer Officer
ClientSuccess

brought to you by

client**success**

JUST BECAUSE A CUSTOMER
PURCHASES YOUR SOFTWARE,
DOES NOT MEAN THEY
HAVE WHAT IT TAKES TO
BE SUCCESSFUL.

WE NEEDED A WAY TO PROFILE
NEW CUSTOMERS TO DETERMINE
HOW TO SUPPORT THEM AND
UNDERSTAND THEIR ABILITY TO BE
SUCCESSFUL IN THE PARTNERSHIP.

SUCCESS PROBABILITY SCORE

WHAT IS A SUCCESS PROBABILITY SCORE?

PROFILE OF CUSTOMER

Defined the elements of what criteria makes the most successful customer.

Create a list of binary traits.



1

2



WEIGHTED

Not every criteria point is created equal - just like a health score determine which elements should be weighted higher.

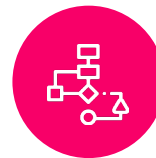
SCORE BANDS

Create point bands that allow you to design programs and work flows based on these score bands - even assign segmentation.



3

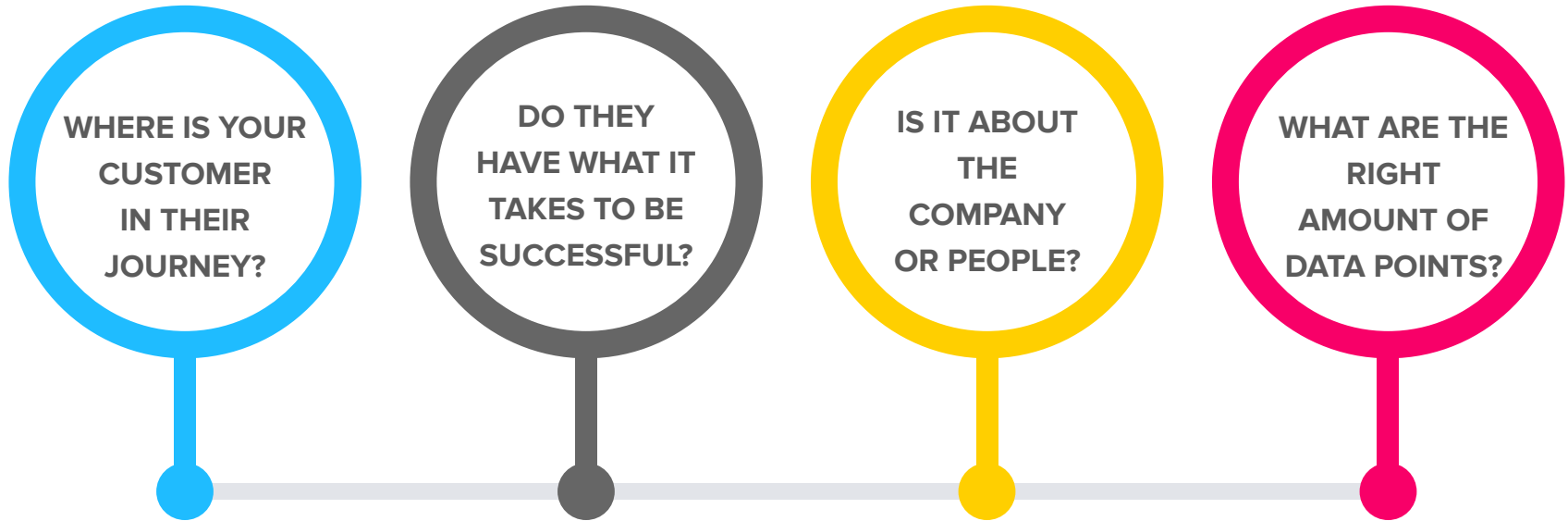
4



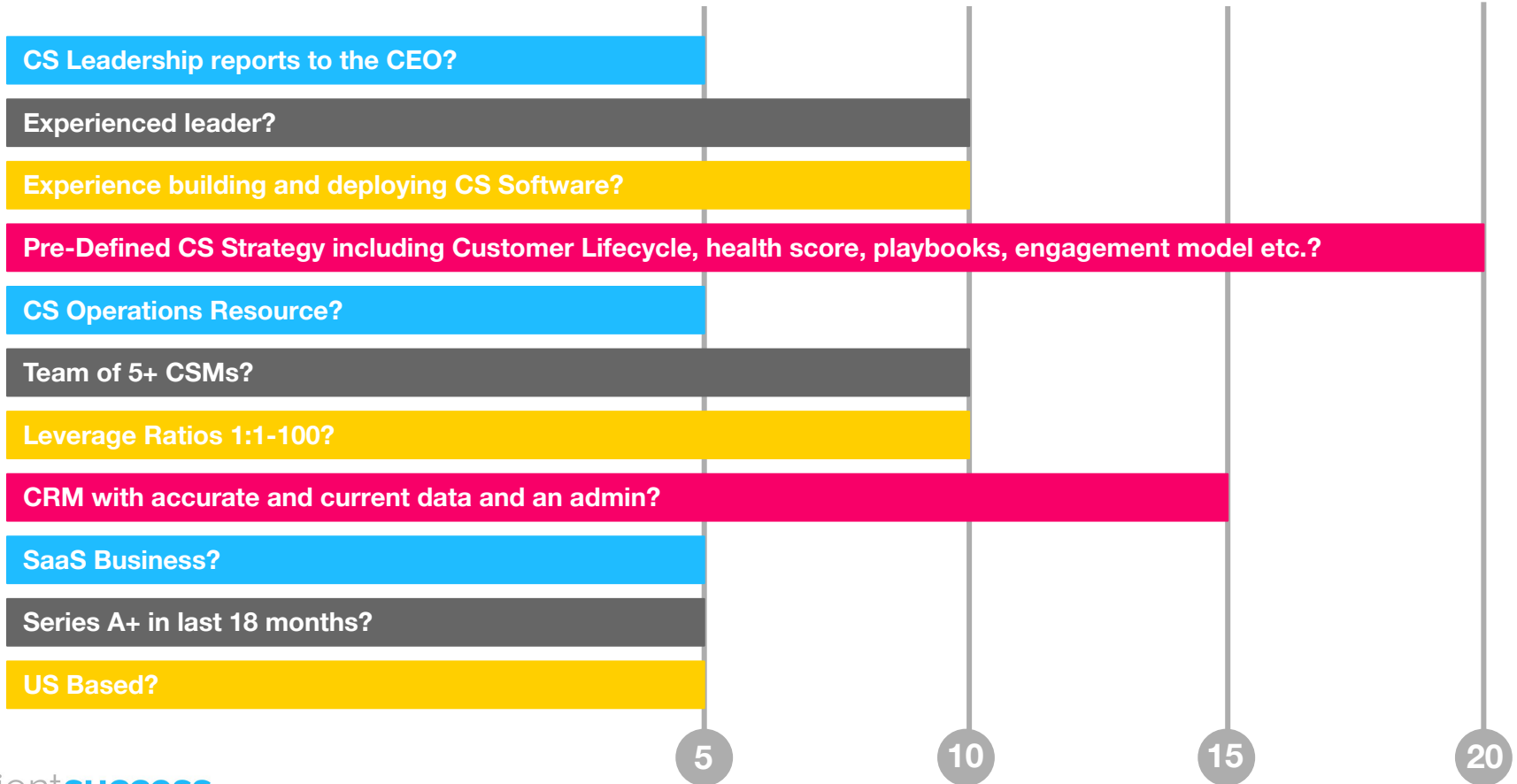
PROGRAM MANAGEMENT

Design new customer workflows and journeys that help ensure each band can be successful in the partnership.

SELECTING YOUR CRITERIA



SELECTING YOUR CRITERIA



WHEN TO ESTABLISH YOUR SCORE?



KICKOFF

CSM qualifies the customer at the start of the partnership.



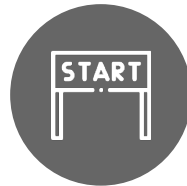
ADOPTION

CSM qualifies the customer after onboarding is completed.



PRE-SALES

Have your sales team qualify and score customers before they start.



ONBOARDING

CSM/OBM qualifies the customer during the onboarding process.



TRACKING THE PROBABILITY SCORE



CRM

- If your team is leveraging a CRM as your source of truth you can store this number in SFDC/Hubspot etc.



CUSTOMER MANAGEMENT SOFTWARE

- If your team is leveraging a Customer Management Software, like ClientSuccess, you can store the number there for program management.



EXCEL/SHEETS

- If your team is using Excel or Sheets to track your customers, you can enter the number there for overall management.

PUT THE SCORE TO WORK

SEGMENT YOUR CUSTOMERS

Use the score to redefine how you segment your customers. This is more effective than ARR.



CUSTOMER LIFECYCLE

Use the score to determine the lifecycle tracks your customers follow.



HEALTH SCORES

Use the score to define appropriate health score for the different cohorts.



ONBOARDING TRACKS

Customize your onboarding journey based on how your customers scored.



ENGAGEMENT MODEL

The score can help determine how much your team should engage with your customer.



IMPACT OF YOUR PROBABILITY SCORE

DESIGN A BETTER CUSTOMER EXPERIENCE

- Customize your Customer Lifecycle focused on your new customer segmentations; this will ensure you are giving your customers what they need, when and how they need it.

TRACK THE RIGHT METRICS

- The score will empower you to track the right metrics for your customers. Create new leading indicators to interpret how your customers are doing and the value they are getting from the partnership.

MITIGATE RISK

- If you use the score for customer segmentation and are able to create a unique health score you'll be able to better understand risk and success for your customers. Remember CS is not a one-size-fits-all strategy.

INFLUENCE SALES, MRKT, AND PRDT

- Use the insights from your data and your customers to share with your Sales, Marketing and Product teams. These learnings can influence your ICP or sales discovery process, marketing content and communication as well as your product roadmap and innovation strategy.

PROBABILITY SCORE MISTAKES TO AVOID

1.

THIS DOES NOT REPLACE YOUR CUSTOMER HEALTH SCORE

2.

DON'T FORGET TO TRACK AND MODIFY AS NEEDED

3.

DON'T DEPLOY THIS INITIATIVE IN A VACUUM - BRING THE TEAM IN

4.

DON'T JUST BUILD THE SCORE - THE PROGRAM IS WHERE THE POWER LIES

5.

DON'T BE AFRAID TO SHARE THIS INSIGHT WITH THE CUSTOMER - THEY'LL APPRECIATE IT IF IT'S DONE RIGHT

THANK YOU