

Scaling Customer Success *...Your Way*

David Sakamoto

@hapapower

Head of Customer Success, Americas

Cisco Systems



Scale Defined

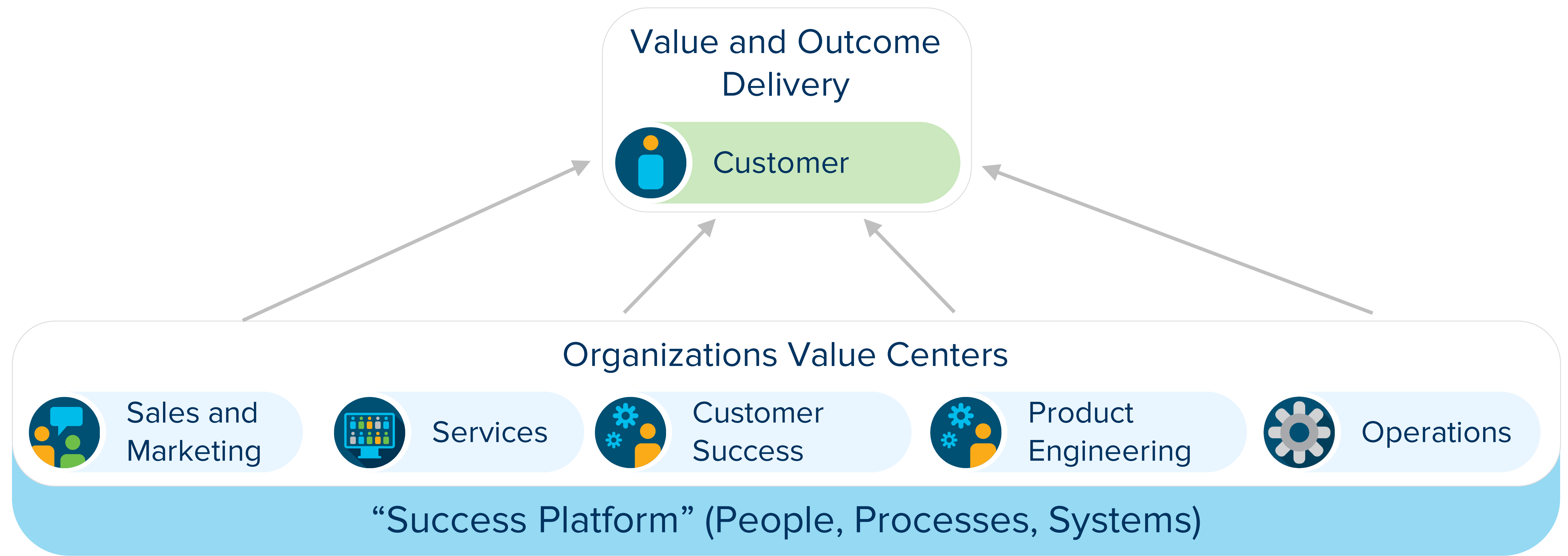


Scalability is the capability of a system, network, or process to handle a growing amount of work, or its potential to be enlarged to accommodate that growth.


If the design or system fails when a quantity increases, it does not scale.

Source: Wikipedia


Customer Success: System of Value Delivery




Scaling = Future Proportional Growth



Bookings and Revenue




Number of Customers




Markets and Verticals



Geographies

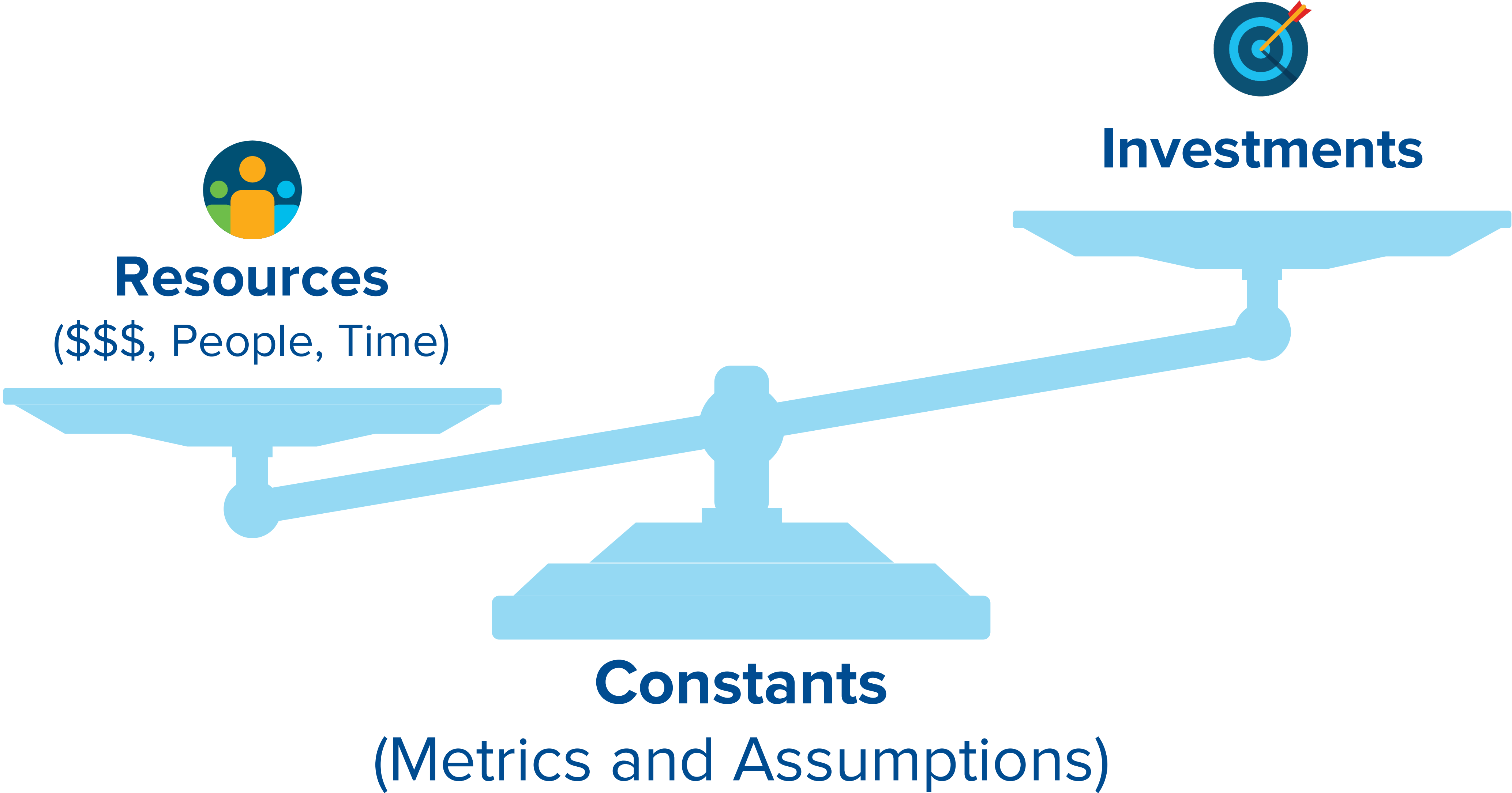


Products and Services



Number of Employees

And Tradeoffs of Scarcity



What Are Your Investments?

- People
- Process and Operations
- Systems and Tools

- Culture
- Communications
- Specialization
- Roles, grades & career path
- Hiring practices
- Training and enablement
- Compensation and rewards



What Are Your Investments?

- Process and Operations

- Lifecycle management processes
- Processes and policies (handoffs, QBRs, escalations, etc.)
- Metrics and reporting
- Operations (account reviews, commits, etc.)



What Are Your Investments?

- People
- Process and Operations
- Systems and Tools

- CRM
- Customer Success platform
- Digital tools (communication, business system automation, etc.)
- Knowledge Base / LMS
- Portals (employee, customer and partner)



What Are Your Constants?

- Quality Standards
- Effectiveness and Reliability
- Efficiency (Financial, Time, Resources)
- Capacity and Throughput



Case Study of Scale: Upscale Inc.



Stages

- Early Stage
- Mid-Stage
- Growth
- Global Enterprise

Early Stage: Acquire Customers



Goals

Customer acquisition
Find product market fit



Constants

Grow number of customers
Grow bookings / revenue and market share
Demonstrate growth / prove business plan



Customers

- Sub-50 customers
- Major Metropolitan North America



People

- 25 employees
- CSM - "Jack of All Trades"
- "Same Office" Culture



Process & Operations

- Basic journey map and solution blueprint
- Outcome metrics (health score, net retention)



Systems & Tools

- Basic CRM
- Support case management
- File share for knowledge

Mid-Stage: Reactive to Proactive



Goals

Grow North America market share
 Obtain, retain and grow customers
 Mature engagement and services
 Expand product features



Constants

Grow number of customers
 Improve reliability, quality and proactiveness of adoption delivery



Customers

- 100s of customers
- North America
- SMB and mid-market



People

- 150 employees
- VP of Customer Success
- Small CSM, onboarding and support team
- Role definitions and comp structure
- "Train the Trainer"



Process & Operations

- Lifecycle process with segmentation and playbooks
- Outcome metrics and diagnostic metrics (NPS, TTV, health score by stage, standards)
- Operational processes / RACI



Systems & Tools

- CRM
- Support and customer success platform with some automation
- Knowledge base (int/ext)

Growth Stage: Mature and Optimize for IPO



Goals

- Continue improving quality and reliability
- Grow business internationally
- GTM and product sophistication (verticals, partners)
- Grow team by 30%, Maintain margins



Constants

- Market share (NA and EMEA), Customers & ARR
- P&L metrics/margin
- Customer base / ARR
- Customer Sentiment / NPS



Customers

- 100s-1000s
- North America and EMEA
- Verticals (Mfg, Health Care, Public Sector, etc.)
- Introduce Customer Advocacy Programs



People

- 350 employees
- Job roles, career paths
- Formal enablement (Internal, partner, customer)
- Formal culture programs



Process & Operations

- Unique journeys based on data and segmentation rule
- Process automation and digital integration
- Dedicated operations team



Systems & Tools

- CRM
- Support & customer success tool w/ automation and data science
- Knowledge base
- Partner portal
- System integration

Global Enterprise: Global Growth



Goals

- Grow global market share
- Expand product portfolio and GTM reach
- Improve customer experience
- Preserve and improve margin



Constants

- Market share, financial metrics, etc.
- Customer base / ARR
- Customer Sentiment / NPS



Customers

- 1000s+
- Worldwide
- Multi-segment and verticals



People

- 1,000-10,000+
- Global presence
- Mature CS and services offering
- Mature HR and comp systems
- Formal enablement programs and team
- Formal culture programs



Process & Operations

- Unique journeys built and supported by data science and AI
- Mature operations team (training, campaign, etc.)
- Deep data insight (real time / historical)



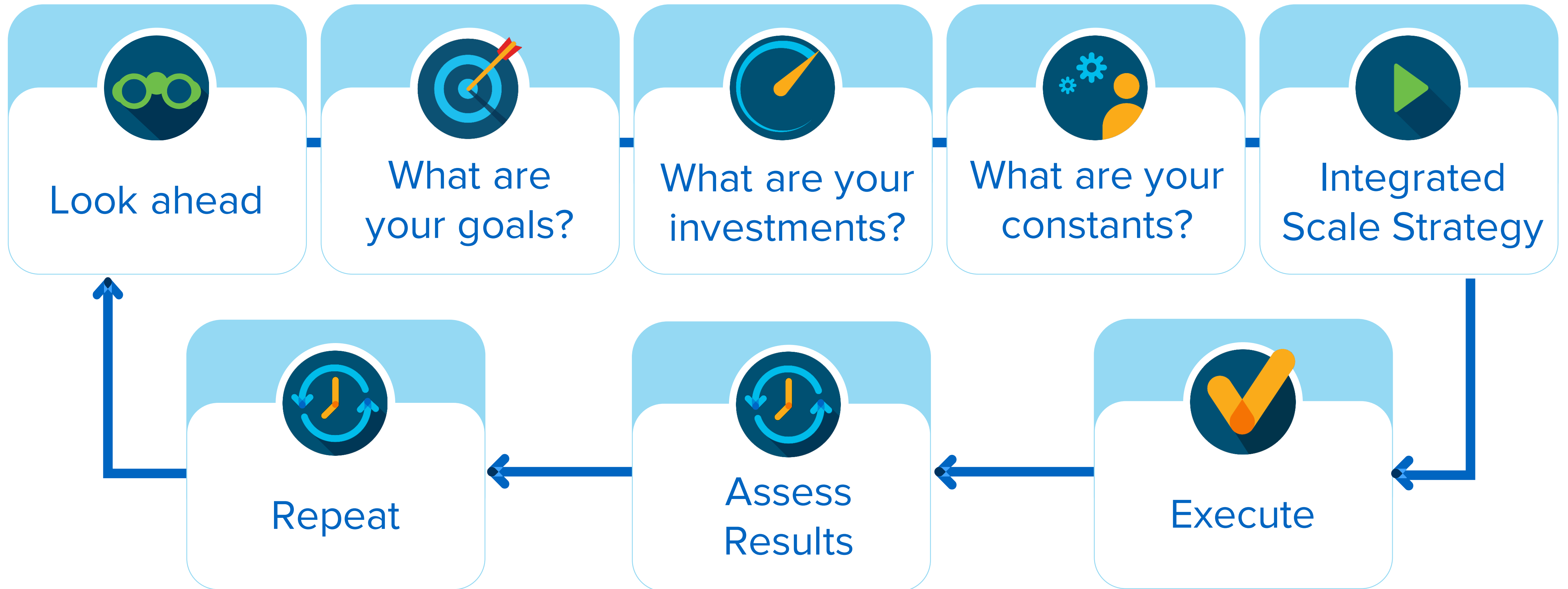
Systems & Tools

- CRM
- Lifecycle management
- Automation/AI/Data Science
- Integrated systems
- Partner portal

Scale Evolution Diagram

	Early Stage	Mid-Stage	Growth	Global Enterprise
Customers Total Number Geographies Segments or Verticals GTM Channels	Sub-50 Major Metropolitan North America – Major metropolitan areas	100s North America Simple Segmentation	100s-1000s North America and EMEA Verticals (Mfg, Health Care, Public Sector, etc.) Introduce Customer Advocacy Programs	1000+ Worldwide Mature Segments Resell and Service Partners
Products and Services Product Offering Services	Single Support	Single Onboarding (\$), Support	Single w/ Modules Onboarding, Consulting, Training, Support	Multi-product Portfolio Onboarding, Consulting, Training, Support
People and Culture Roles, Levels and Career Path Specialization (skill and level) HR and People Processes Culture	25 people “One Office” Approach Organic Culture CSM Jack of All Trades Reactive Model	150 employees VP of Customer Success Small CSM, onboarding and support team Role definitions comp structure “Train the Trainer”	350 employees Job roles, career paths Formal enablement (Internal, partner, customer) Formal culture programs	1,000-10,000+ Global presence Mature CS and services offering Mature HR and comp systems Formal enablement programs and team Formal culture programs
Operations Lifecycle Management Processes Metrics Operations Support	Basic Lifecycle Process Limited Process Needed Outcome Metrics (health score, net retention)	Lifecycle process with segmentation and playbooks Outcome metrics and diagnostic metrics (NPS, TTV, health score by stage, standards) Operational processes / RACI	Unique journeys based on data and segmentation rule Process automation and digital integration Dedicated operations team	Unique journeys built and supported by data science and AI Mature operations team (training, campaign, etc.) Deep data insight (real time / historical)
Systems and Tools CRM Lifecycle Management Digital Knowledge Base Tool Integration	CRM Case System Support File Share for Knowledge	CRM Support and customer success platform with some automation Knowledge base (int/ext)	CRM Support & customer success tool w/ automation data science Knowledge base Partner portal System integration	CRM Lifecycle Management System Support Automation / AI / Data Science Knowledge Base (internal/external) Integrated Systems Partner Portal

Scaling Strategy Framework



Scale YOUR Way!



Scale YOUR Way!



Your Customers

Your Solution

Your Customer Experience

Your Scale Strategy



Presentation Template