

Salesforce to ServiceNow: Lessons Learned



Dean Robison

SVP, Customer Success
ServiceNow

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Salesforce to ServiceNow

Some lessons learned along the way...

Dean Robison

SVP, Customer Success

Agenda

My background

The case for change

No customer left behind

Baby steps

Unleash the Kraken

My background

Husband, Dad, Gentleman Farmer

Marine officer for 10 years

Salesforce – 13 years in leadership positions across Professional Services, Customer Success, Technical Support and M&A Integration

InsideSales.com – 2 years as Chief Customer Officer

ServiceNow – 18 months...started leading Technical Support, now leading Customer Success

Why change?

2018 Forbes “Most Innovative” Company

98.5% Gross Retention Rate

127% Net Expansion Rate

50+ NPS



But...Customers told us they want a deeper relationship and more proactive guidance

The Case for Change – Protect and Grow Faster

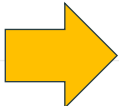
FY15-FY17
“Growth!”

FY18-FY20
“Growth! 2.0”

Sales

Land, Expand, Retain (Vendor)

Rapid market share capture.
 Opportunistic account expansion.



Land, Expand, Retain (Trusted Partner)

Invest in tighter AE:Acct Ratios, supporting resources, training, and tools to drive account penetration. Focus geographically.

Customer Success

Universal Mindset

Everyone swarms to ensure customers do not fail.



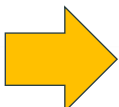
Operational Model (and mindset)

Coordinated tools, processes, and resources to ensure customers receive value. Applied in a scalable model based on customer size and potential.

Partners

Transactional

Scrambling to support whenever a 3rd party is required to drive ACV.



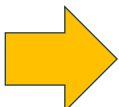
Strategic

Programmatically extend ServiceNow's Delivery, Sales, & Innovation capacity through the use of accredited Partners

PS

Integrator

Solving for the gaps in our partner ecosystem.



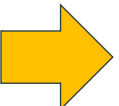
Advisor

Build world-class Assurance & Advisory services and training programs to help customers be more successful

Marketing

Supporting

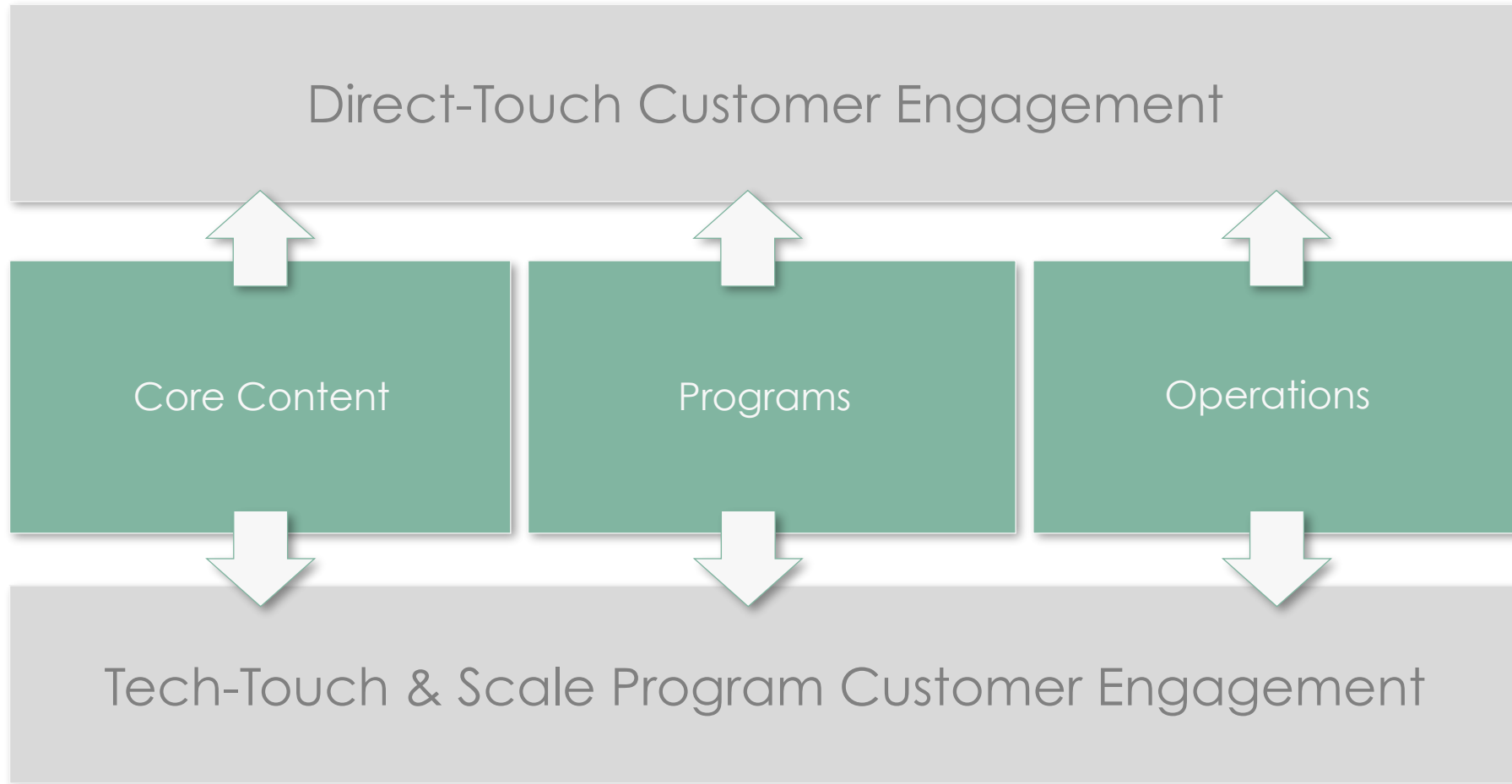
Targeted campaigns, events, and collateral to help grow the business.







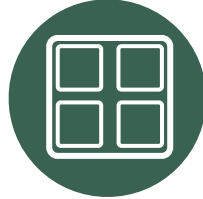
Elevating

Continue Growth Plays. Add: Build & amplify vision for the C-suite. Support Sales Investment with strong Account Based Mktg & Field Events. Prioritized Top Markets.

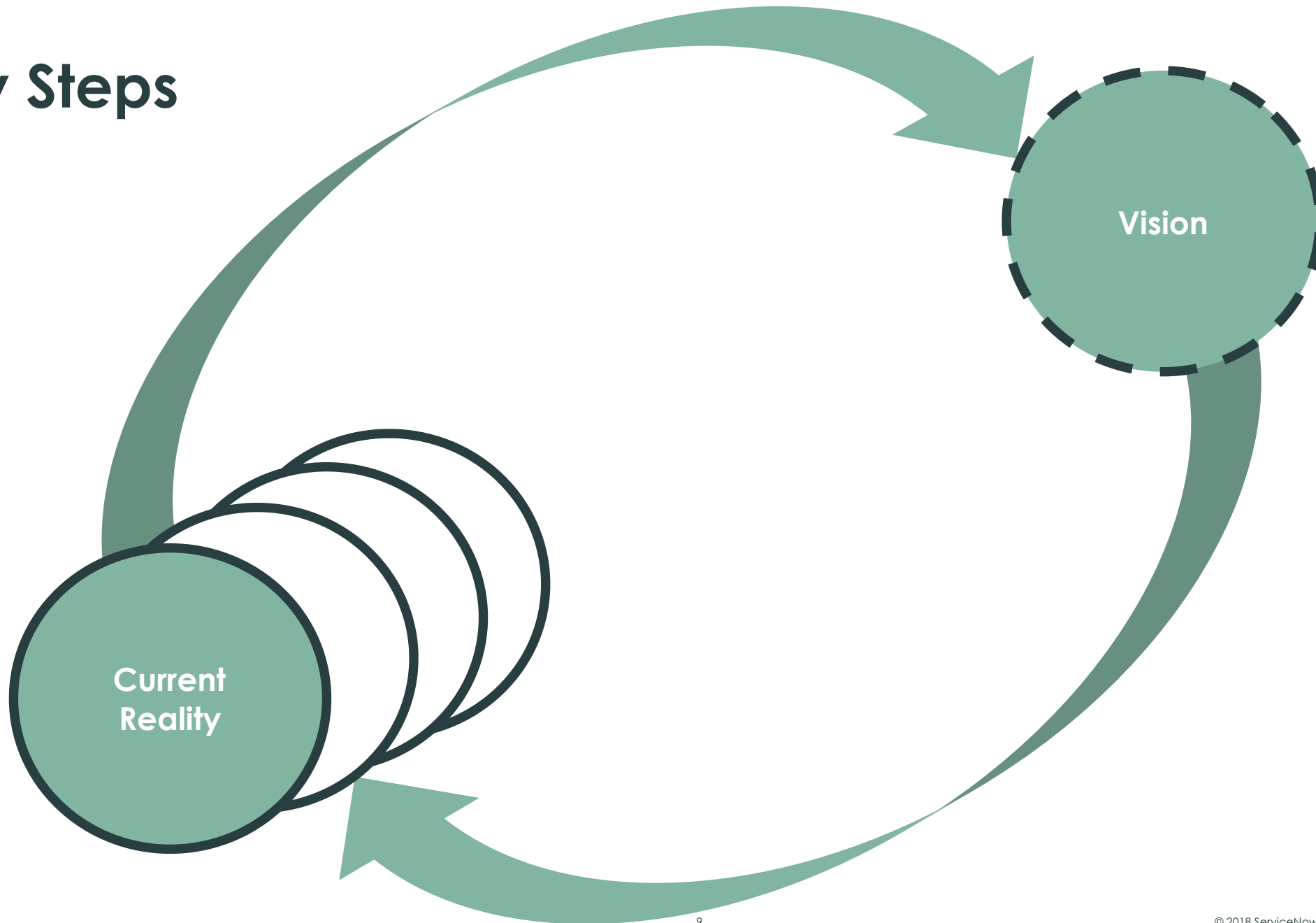
No Customer Left Behind



Customer Success Framework

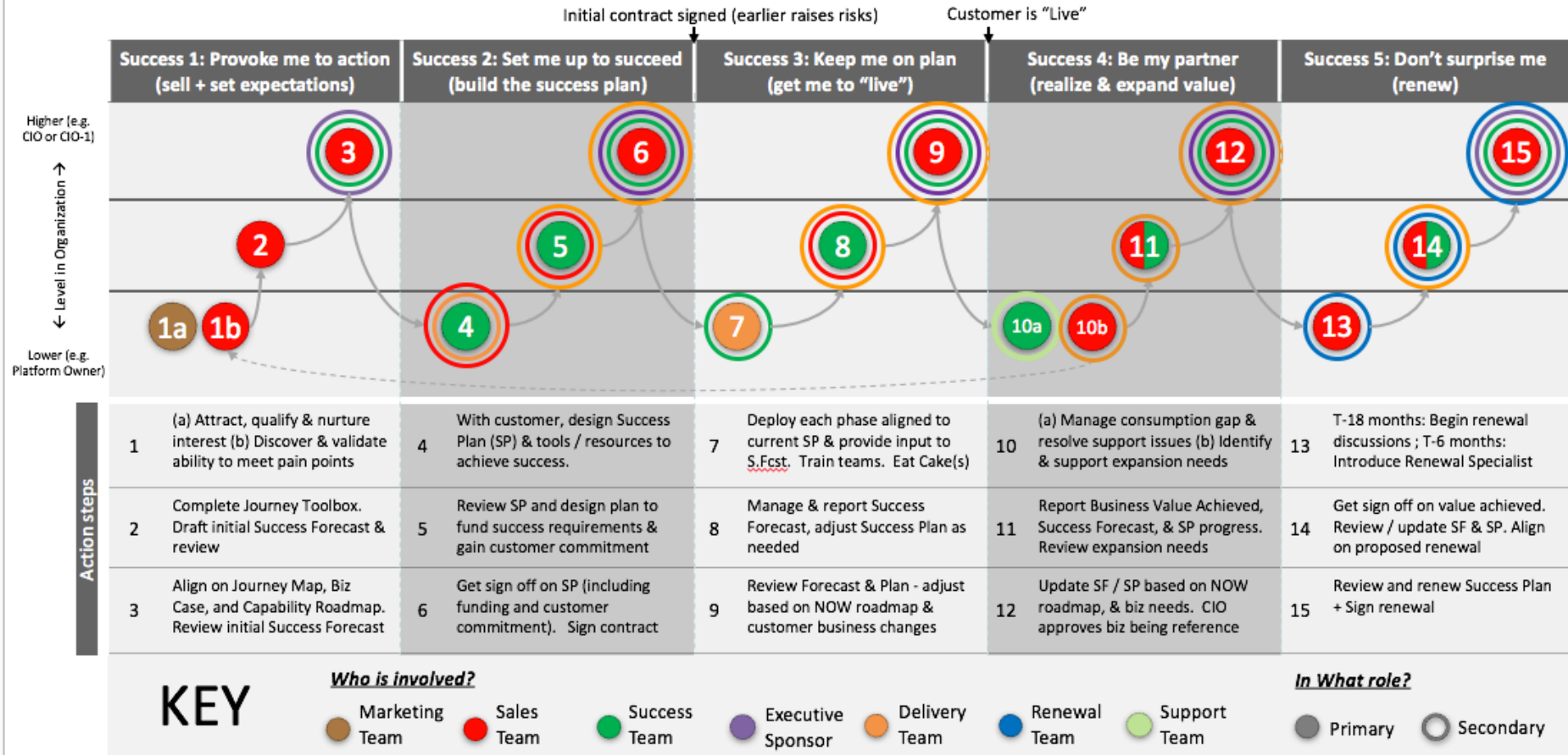
				
Success Executives	Success Center	Success Content & Tools	Success Insights & Analytics	Success Programs
<p>Key Components</p> <ul style="list-style-type: none"> • Proactive outreach & strategic guidance • Partnership & advocacy • Operational risk mitigation • Escalation management • Value realization management 	<ul style="list-style-type: none"> • World-class technology • Easy access via ServiceNow.com • Easy-to-use interface • Robust search features 	<p>Key Components</p> <ul style="list-style-type: none"> • Managed and delivered via the Success Center • Curated best practice content by journey phase and product • Content & templates to succeed as a ServiceNow Champion 	<p>Key Components</p> <ul style="list-style-type: none"> • Peer benchmarking data • Assessments and reports to analyze performance and adoption of new features and products 	<p>Key Components</p> <ul style="list-style-type: none"> • Best practice Webinar enablement series • Event Genius Bars • SNUG's • Community

Baby Steps

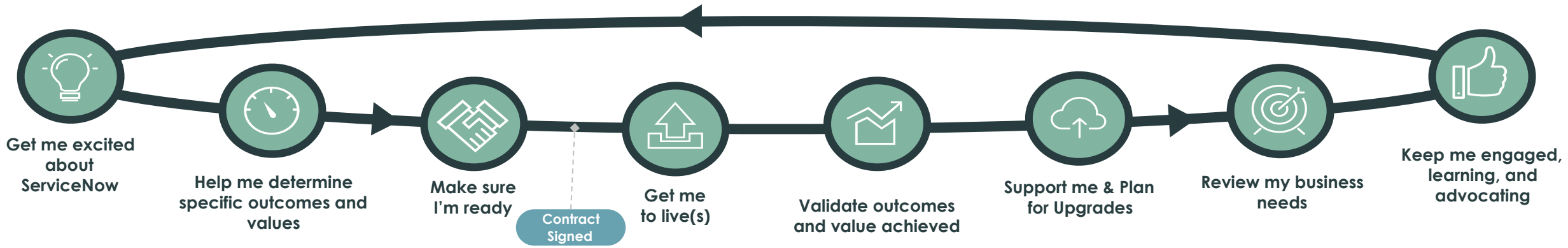


The First Step...

Direct-Touch Customer Engagement



The Next Step...



- Initial value prompter
- Account plan
- POV / demo

- Business case
- Customer strategy map
- Stakeholder maps
- Updated account plan and value prompter

- Mutual plan
- Sales team interlock meeting
- Customer Success Plan-CSP
- Implementation checklist
- Implementation roadmap
- Architectural blueprint
- Value realization benefit plan
- Final order documents

- Updated CSP
- Escalation process
- Solution design review
- HealthScan Sprint reviews
- Updated BVA
- Implementation checklist review
- Support walkthrough
- Adoption toolkit

- Validate strategy map
- Updated CSP
- Journey insights review
- Value realization workshop / study
- Improvement suggestions based on value realization results

- SAM support reviews
- Upgrade assistance findings
- HealthScan Config review
- Updated CSP

- Updated account plan
- Updated CSP
- Product roadmap review
- Customer action plan alignment

- Reference program
- Knowledge plan
- Events / programs
- Learning Library access

Unleash the Krakken...



Customer Success Packages

Package Components		Customer Success Packages		
		Professional Success	Enterprise Success	Premier Success
Success management	Manages and coordinates activities to help ensure your success	✓ Remote/Qtly Review	Shared/Weekly Review	Dedicated/ Weekly Review
Technical and solution expertise	Technical insight and guidance from a named architect		✓ Shared	✓ Dedicated
	Align implementation plan to your strategic outcomes	✓ Annual	✓ Annual	✓ Annual
	Reviews designs from a process and architecture approach to determine fit for purpose	✓ Annual	✓ Annual	✓ Annual
	Assess implementation quality against ServiceNow best practices	✓ Monthly (remote)	✓ Monthly	✓ Weekly
	Evaluate instance based on manageability, scalability, security, upgradeability, and usability	✓ Annual (remote)	✓ Annual	✓ Annual
	Display key integration points visually	Annual ✓	Annual ✓	Annual ✓
Support contact and instance management	24x7x365 Tech Support (available with Subscription)		✓	✓
	Single point of contact for support issues and oversight for upgrades, patching and changes	✓	Shared ✓	Dedicated ✓
Productivity and internal expertise	Unlimited Learning Library Access		✓	✓
	Communicate and train your organization to drive adoption		Change + 1 product	All Products
	Private Training tailored to your unique needs		✓	60 Learning Credits
Value realization	Value Assessment and Review		Semiannual Review	Quarterly Review

In Summary...

- Clear goals, timelines and sponsorship
- Address all of your customers
- Change is hard...take small steps towards your vision, clearly set and reset expectations along the way
- Use all the resources available to you with a clear financial model

Thank you!!!

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