

Radical Change: The Strategic, Tactical, and Human Elements of Massive Customer Success Transformation



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Radical Change

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CS100
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SUNDANCE, UTAH



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Customer Success transformation: we're in motion

- Goals:
 - Grow the business by focusing on adoption, retention, churn, advocacy
 - Engage, listen, and absorb
 - Accelerate development of data-driven and automated processes
 - Deliver proactive and business-context service
 - Identify and deliver customers' desired business outcomes
 - Scale across entire account base
 - Up-level CS skills
 - Change the culture



A new model purpose-built for SaaS



Two interrelated models

- Platinum
 - For all customers no matter their ARR
 - Self-serve
 - Data-driven, proactive outreach and live chat
 - Pooled CSMs
- Advanced Services
 - For-fee assigned CSM
 - Business value guidance & higher level of solution expertise



Customer Success Experience – then and now

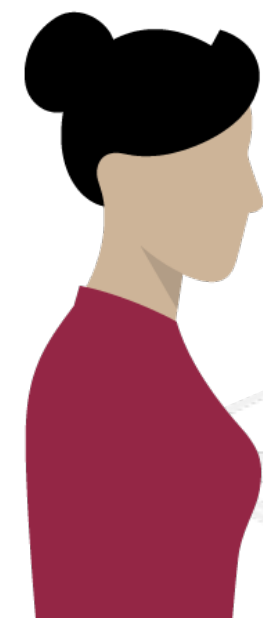
New ecosystem serves customers better than the previous model through proactive processes that drive business outcomes

Previous service model:

- Single channel
- Lack of agility
- Divided focus



- Manage SRs
- Coordinator role
- Answer customer care questions



Customer

New service model:

- Multi-channel
- Responsive and agile
- Proactive
- Focused Expert
- Incented by customer's success

ENGAGE EXPERT
CSM AND OTHER
EXPERT RESOURCES

2,000+ LEARNING
TOPICS

FASTER RESPONSE
TIMES

ENHANCED DIGITAL
EXPERIENCE

PROACTIVE
MONITORING AND
OUTREACH

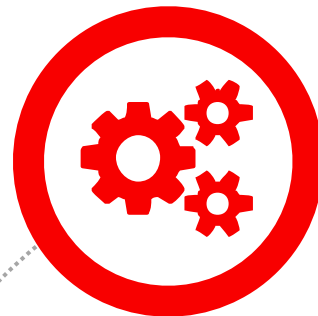
LIVE CHAT
CHANNELS

SUCCESS PLANNING
TOOLS

SaaS Platinum-Level Services For Every Customer

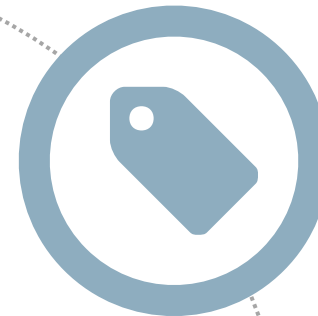
Issue Resolution

Helping customers resolve issues faster with 24x7 Severity 1 support coverage



Tailored Adoption Guidance

Helping end users adopt and achieve business value faster with best practice content



Implementation Support

Dedicated implementation resources providing hands-on support through the implementation process



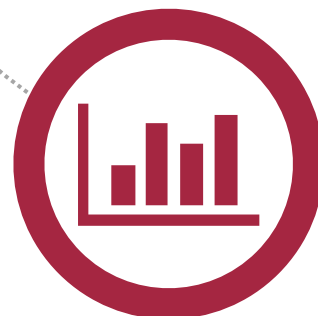
On-Demand Education

Over 2,000 new training guides, as well as guided starter packs, at no additional cost for every customer



Success Planning

We'll work with customers on technical and business execution strategy to ensure success



SaaS Paid Advanced Services

Advanced Services designed to help you achieve success. You choose the services you need based on your specific business requirements.

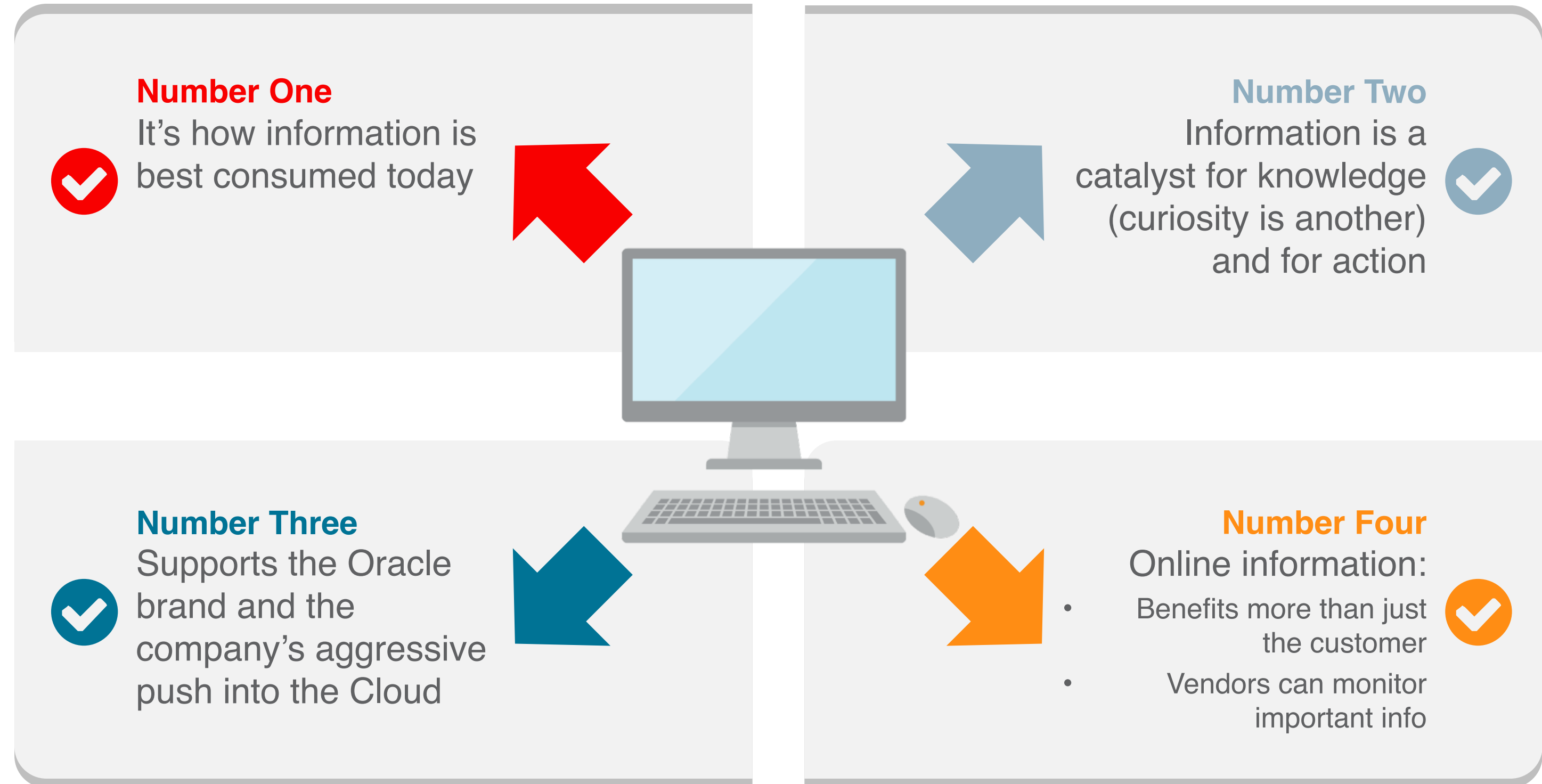


Services delivered by product, domain, and industry experts with the experience needed to help you achieve success.

“Vendors should offer services that can be tailored to exactly what I need to succeed -- rather than only provide preset options. Time is limited, and as a result, both the services and the service selection process need to be efficient and flexible.”

- Growth Marketing Manager, Education Industry

The Digital Experience – Why It's Necessary



How we're doing it

- Research
 - Voice of the Customer and Global Customer Programs interviewed hundreds of customers over two years
 - Studied competitors
 - Industry research - TSIA, SiriusDecisions, IDC, McKinsey, Aberdeen, Forrester, Gartner
- Focus
 - Customer-centricity; respect for all customers; mapping journeys; adopted a marketing mindset to get to know customers
- Organizational structure
 - Operations, Strategy, Sales teams all under Customer Success leader
- Cross-organizational alignment
 - Closer process alignment with Sales and Marketing, Customer Support, and Education
- Roles, responsibilities, and skills
 - Deep assessment of tasks and required skills; aligned new design to customer need; hired or trained accordingly
- Executive commitment and communication
 - CEO and GVP of Customer Success met/meet regularly around the design and rollout of new model
 - Joint press release; joint internal communications



**How do you get there
from here?**

Respect

- Customers
- Employees
- Shareholders



Toss this admission of failure



And work towards ending these



The work we do should matter

- Self-transcendent
- Poignant
- Episodic
- Reflective
- Personal



Source: <https://sloanreview.mit.edu/article/what-makes-work-meaningful-or-meaningless/>

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Research



Brainstorm



Test



Win the C-suite



Communicate and evangelize - externally



Communicate and evangelize - internally



Involve critical stakeholders



Project professionalism



Sustain



Sustain with better odds of success



And listening

ORACLE®

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