

CUSTOMER SUCCESS LEADERSHIP BOOTCAMP

PART III: ANATOMY OF A HIGH PERFORMING HEALTH SCORE

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1PM EST/ 10AM PST



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VP of Customer Success
ClientSuccess

brought to you by

client**success**

A Customer Health Score is
a **metric based** scoring
mechanism used to **predict**
customer **behaviors**.

THE DATA



01

ACCESS

Make sure you have access to all of the data you will need to formulate your Health Score.



02

ACCURACY

Verify that the data is accurate. Many times the data coming from compromised sources can be wrong.



03

CURRENT

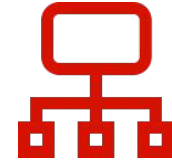
Ensure the data is current and understand the cadence in which it is refreshed, this will impact how it should be used for scoring.



04

IMPACTFUL

Is it the right data? Make sure that any data you use is data that will actually tell you something meaningful and actionable about your customers.



05

INTEGRATED

The data must all work together to formulate a Health Score. If you are using a Customer Success Platform, like ClientSuccess, you can structure it there.

THE METRICS



ENGAGEMENT



PAYMENT



USAGE



RELATIONSHIP



ADOPTION



ADVOCACY



CUSTOMER JOURNEY



SENTIMENT

THE KPIS

ENGAGEMENT

What type of engagement?
Days since last engagement?
Engagement with whom?
Method of engagement?

USAGE

Is everyone using the platform?
How often are they using the platform?
Are there licenses unused?
Are they using it as intended?

ADOPTION

Are they using the solution inline with their use cases?
Have they used all of the features or functionality they have purchased?

JOURNEY

What stage are they in the Customer Journey? What milestones have they completed? How long have they been a customer?

PAYMENT

Have they paid their most current invoice?
Is there an outstanding balance?

RELATIONSHIP

“Regular” engagement with main POC?
Relationships established at multiple levels?
Multithreaded relationships across your organization?
Trusted Advisor status?

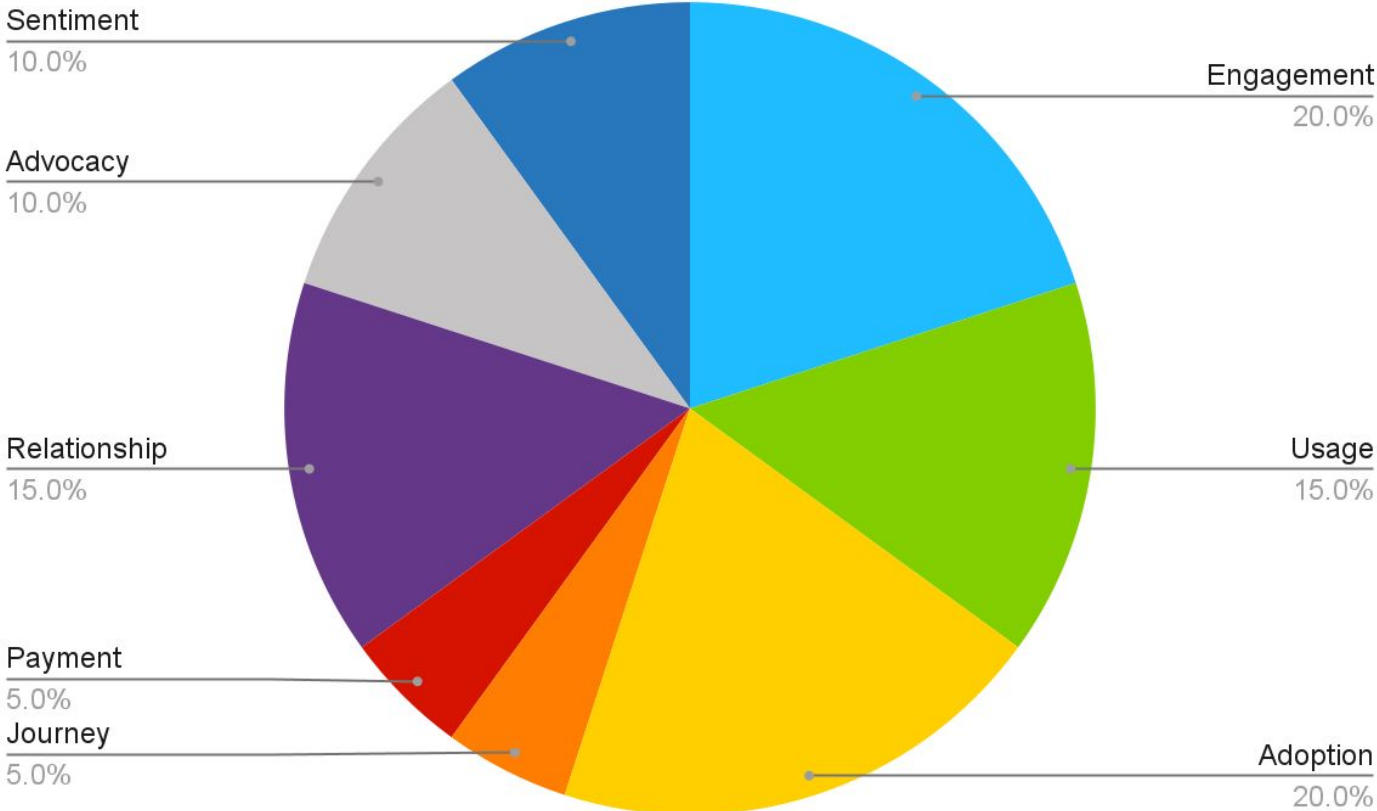
SENTIMENT

How do they feel about the partnership?
How do they feel about the product?
What are the recent survey scores?
What have they said in reviews?

ADVOCACY

Are they willing to serve as a positive reference?
Have they opted into customer marketing initiatives?
Will they refer customers to you?
Will they leave a review?

THE WEIGHTING



THE TYPE



SEGMENT

Create different health scores for different customer segments. This will support different engagement, adoption etc.



STAGE

There can be different measurements of health based on where your customers are in the journey.



VERTICAL

Customers in similar verticals or industries might have similar use cases or product usage work flows.

THE PLAN



01

IDENTIFY

Identify customers whose behaviors indicate some need to provide strategic support.



02

IDEATE

Based on the data from the Health Score you'll be able to leverage a playbook or devise a plan to mitigate risk or capitalize on opportunity.



03

INTERVENE

Time to take action! Based on the data and now the plan, you need to intervene in a timely manner in order to drive the right outcome.

THE IMPACT

INCREASED CUSTOMER VALUE

1

Indicators signal when customer usage/adoption decrease; early warning signs permit you to step in to assist. Early intervention with training and enablement can get people on track.

The ability to identify risk early in the partnership enables you to intervene before things escalate and allows time to get the partnership back on track. Increases in retention.

2

INCREASED CUSTOMER RETENTION

INCREASED ADVOCACY

3

Identifying customers who are using your technology effectively, are highly engaged and have a positive sentiment should be prime for advocacy opportunities.

Customers with strong adoption and maximized consumption would qualify as optimal growth opportunities. This would support targeted efforts around upsell.

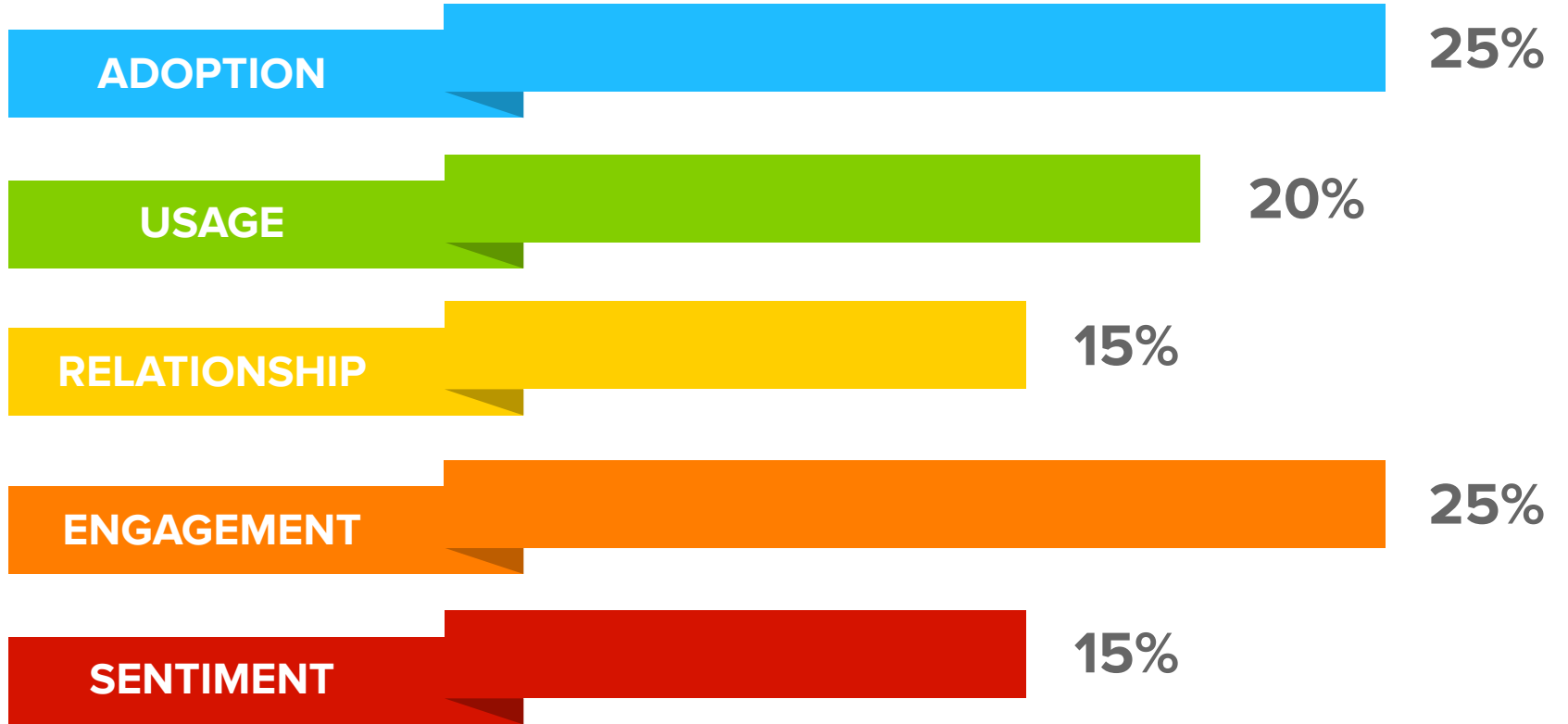
4

INCREASED NRR

CLIENTSUCCESS
CUSTOMER HEALTH SCORE

THE METRICS

CUSTOMER BEHAVIOR SCORE



THE KPIS

1

ADOPTION

Are customers using the 3 core areas of the platform regularly
- Pulse, Engagements and SuccessCycles?

2

USAGE

Are our customers signing into the platform regularly?
How much time do they spend?

3

RELATIONSHIP

Are we mapped to the 4 different important role types in the partnership?

4

ENGAGEMENT

Have we engaged with the customer in the past 40 days?

5

SENTIMENT

What is the sentiment we've captured from the customer in the past 90 days?

THE CONFIGURATION

< SuccessScore Profile

Cancel

Save and Close

Profile name

Customer Behavior Health Score

Description (optional)

173/600

Health Score designed to understand how our customers behave.
Focus on product adoption and usage as well as partnership

This Profile applies to the following client types:

Health Score Test Segment

Metric Groups

Adoption	25%
Usage	20%
Relationship	15%
Engagement	25%
Sentiment	15%
100%	

+ Add Group Delete Group

Group

Name

Adoption

Weight

25% 0% 25% 50% 75% 100%

Metrics

Metric	Label	Min	Max
Client (Custom) - Engmnts Create Ratio	Engagements Created	10	35
Client (Custom) - Pulse Set Ratio	Pulse Set	10	35
Usage - SuccessCycle item completed - 90 ...	SuccessCycles Deployed	-10	10

+ Add Metric

KEY TAKEAWAYS

1.

Every health score is unique and should reflect the story you want to tell about your customers

2.

Remember to go back every 3-6 months and review the performance and make changes

3.

Start simple and don't try to over engineer your score - KISS

4.

Make sure your team understands how to use your health score - Put it to use

5.

Get access to the right data - make sure it is accurate and current and reflects the right activity focus

Q



A