Organizational Success

A Blueprint for Evaluating, Assessing and Developing Your Customer Success Organizations Most Valuable Resource

SuccessHACKER

"An empowered organization is one in which individuals have the knowledge, skill, desire and opportunity to personally succeed in a way that leads to collective organizational success."

- Steven Covey

Workshop Resources

The tools you'll need for today's session.

https://succshac.kr/cs100-workshop

What's keep you up at night?

A recent survey highlighted that that based on their research, Customer Success teams were focusing the bulk of their efforts in the following areas.

Churn Reduction	Product Adoption	Onboarding	Customer Advocacy	Customer Support	Upsells
79%	65%	63%	47%	43%	33%
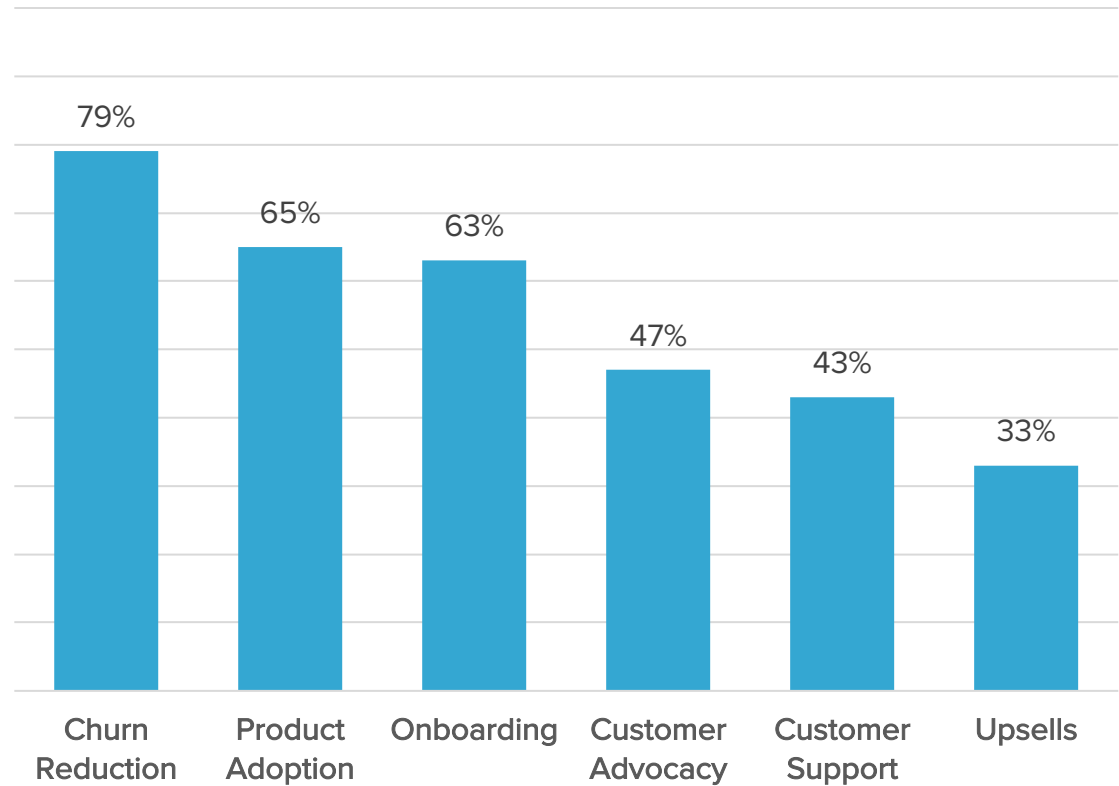
What do they all have in common?

People.

Everyone wants to build a "Success machine".

People.

Objectives for Today's Workshop

1. Introduce a model for quantifying the skills your team needs to succeed at their job
2. Give you a framework for assessing and evaluating your team
3. Help you understand how to adapt and apply this model to assess, evaluate, develop and hire resources

How well you understand your peoples role in your success.

The Elements of Success

To build a Success program that works, you have to effectively coordinate all four of the key elements of a high-performing Customer Success organization.

Strategy	**Systems**
People	**Processes**

The CSA Framework

To build a Success program that works, you have to understand how the core elements interact and work with one another as well as where to focus at each step of the journey.
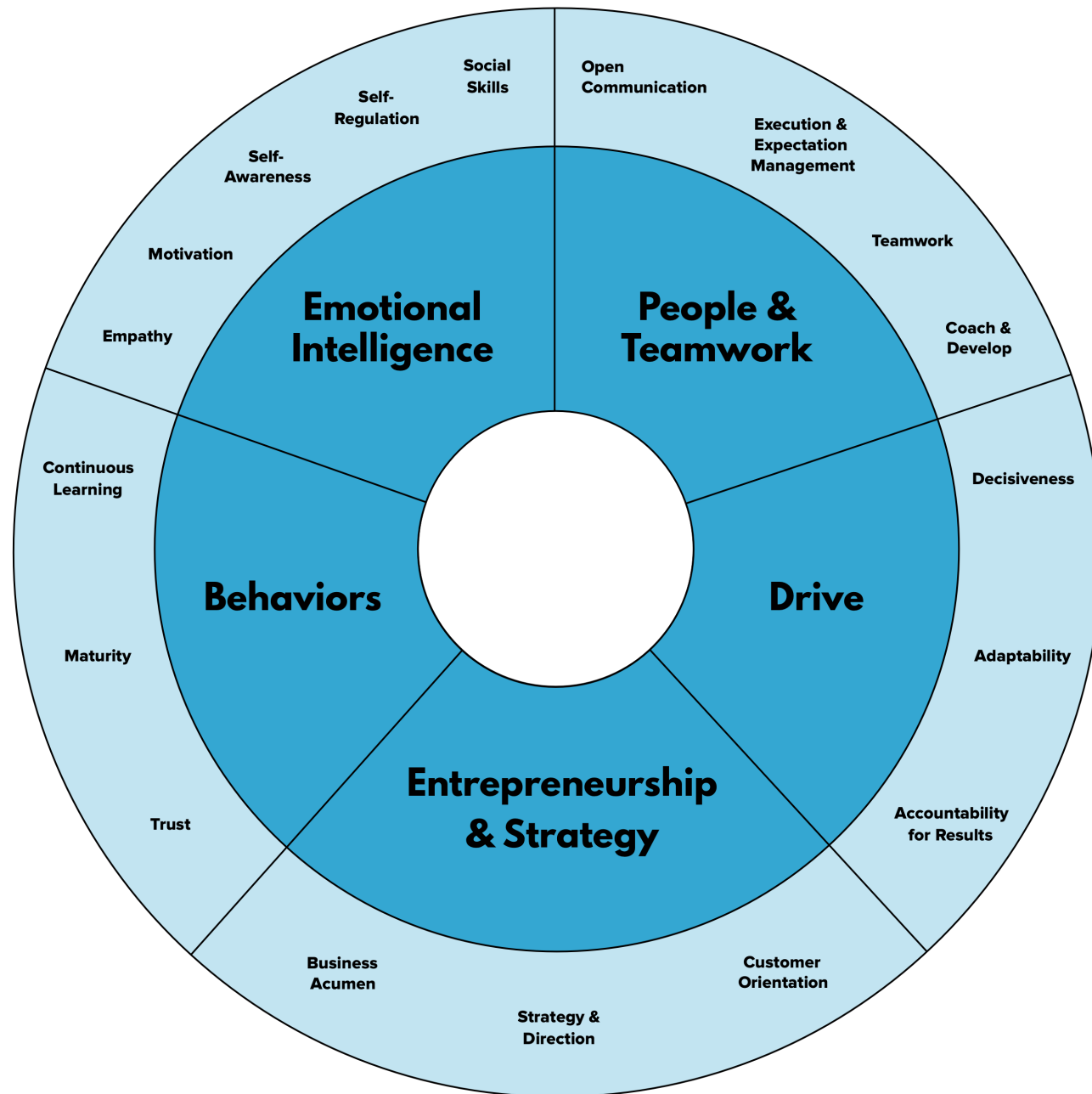

Systems & Continuous Improvement

Operational Discipline

Methodology, Process & Training

Mission, Culture, Purpose & Strategy

What core capabilities should your people possess?

Customer Success Competency Model

Identifying the core Disciplines and Skills that Customer Success Organizations and Professionals must possess.

What is a competency model?

What is the value of having one?

What types of competencies are there?

Three types of competencies.

Core Competencies.

Domain Competencies.

3 Technical Competencies.

Competencies vs. Skills.

What's the difference?

The "What" vs. the "How".

Skills = "What".

Competencies = "How".

The three elements of a competency.

Skills.

Knowledge.

Ability.

Who is it for?

Three levels.

Individual Contributor

An "Individual Contributor" level Customer Success professional is characterized in the following way:

- **Experience:** 1-3 years
- **Responsibilities:**
  - Managing standard customers
  - Basic success planning
  - Executing established processes
- **Typical Titles:**
  - Customer Success Manager (CSM)
  - Implementation Specialist (IS)
  - Account Manager (AM)

Senior Individual Contributor

A "Senior Individual Contributor" level Customer Success professional is characterized in the following way:

- **Experience:** 4-6 years
- **Responsibilities:**
  - Managing Strategic Accounts
  - Developing and streamlining operational Playbooks and processes
  - Developing best-practice training for the Customer Success team
- **Typical Titles:**
  - Senior Customer Success Manager
  - Senior Account Manager
  - Customer Success Director

Leader

A "Leader" level Customer Success professional is characterized in the following way:

- **Experience:** 8+ years
- **Responsibilities:**
  - Design of Customer Success Strategy
  - Establishing team roles and responsibilities
  - Setting performance standards
  - Hiring of Customer Success resources
- **Typical Titles:**
  - Team Lead
  - Manager/Director of Customer Success
  - Vice President of Customer Success
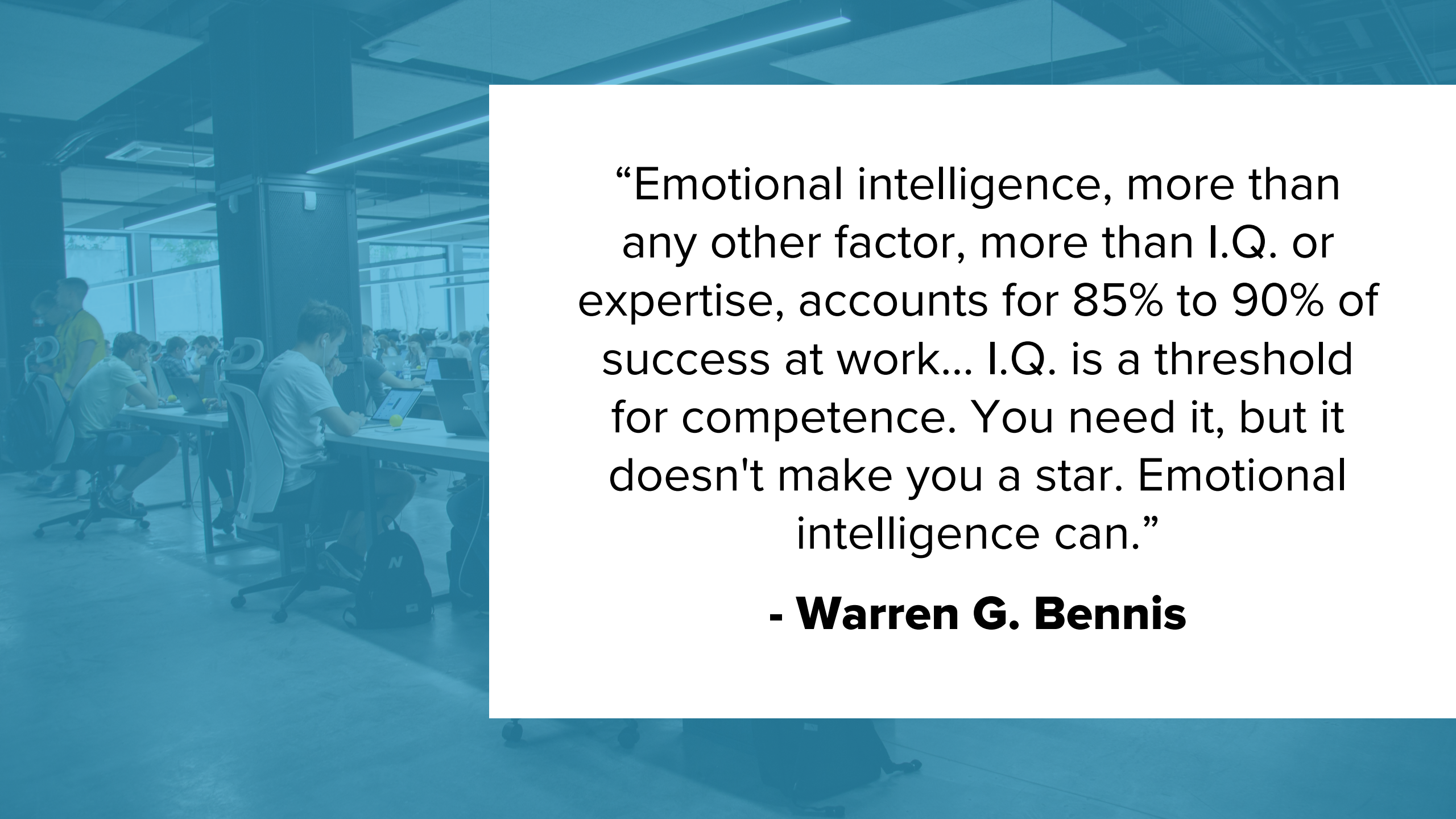 - Head of Customer Success

Five core Disciplines.

Core Disciplines

The core disciplines that Customer Success Organizations and Professionals must possess.

"Emotional intelligence, more than any other factor, more than I.Q. or expertise, accounts for 85% to 90% of success at work... I.Q. is a threshold for competence. You need it, but it doesn't make you a star. Emotional intelligence can."

- Warren G. Bennis

Emotional Intelligence

Emotional Intelligence (EI), also known as Emotional Quotient (or EQ), is the ability of an individual to recognize and control their own emotions and respond appropriately to those of others.

"Great things in business are never done by one person. They're done by a team of people."

- Steve Jobs

People and Teamwork

Concepts focused on how people work together internally, sharing and fostering creative solutions to address issues, and establishing an environment of trust.
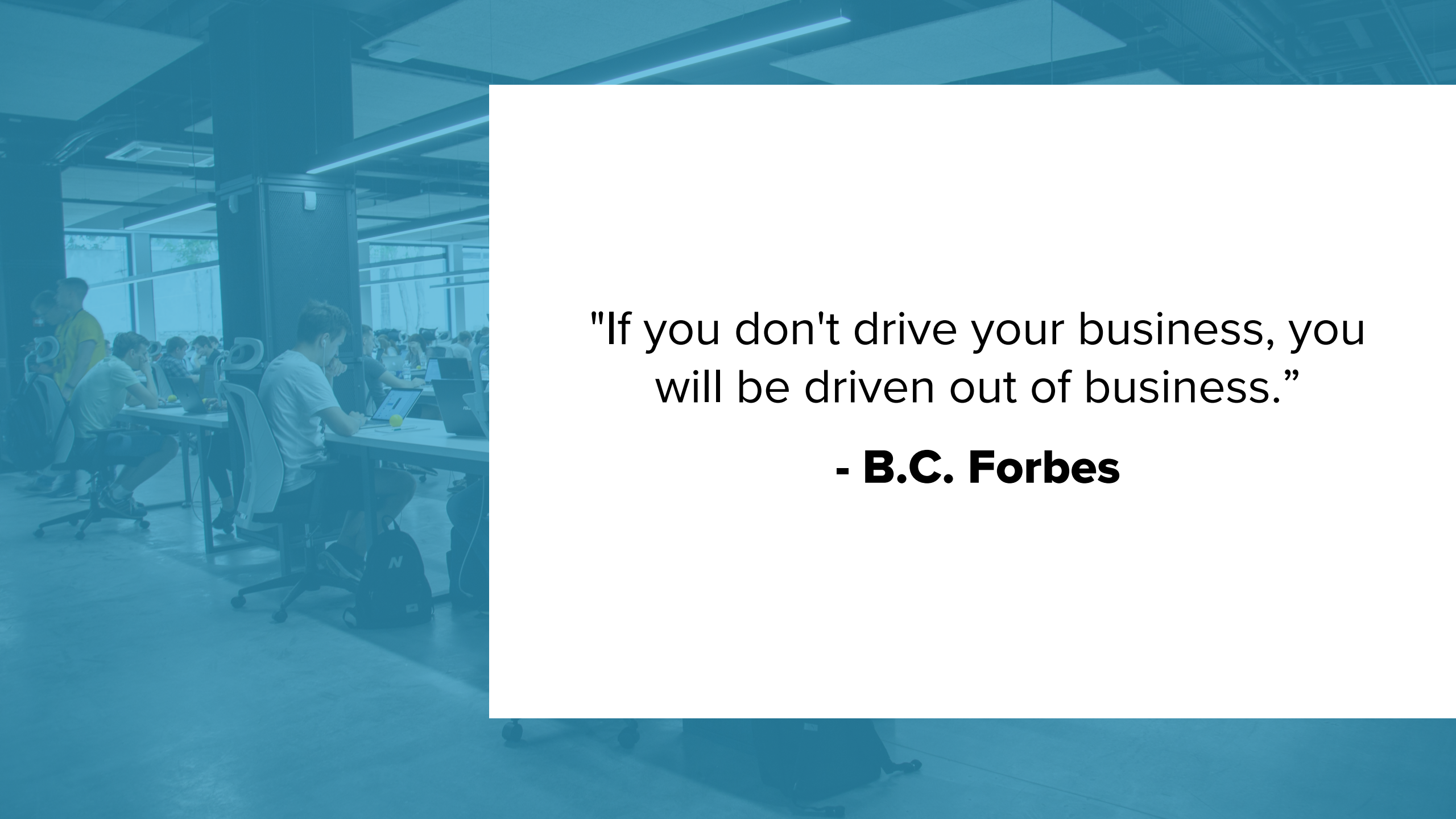
"Attitude drives actions.
Actions drive results."

- Jim Rohn

Drive

Skills that make up the internal motivation or personal "drive" for achieving goals and creating successful outcomes.
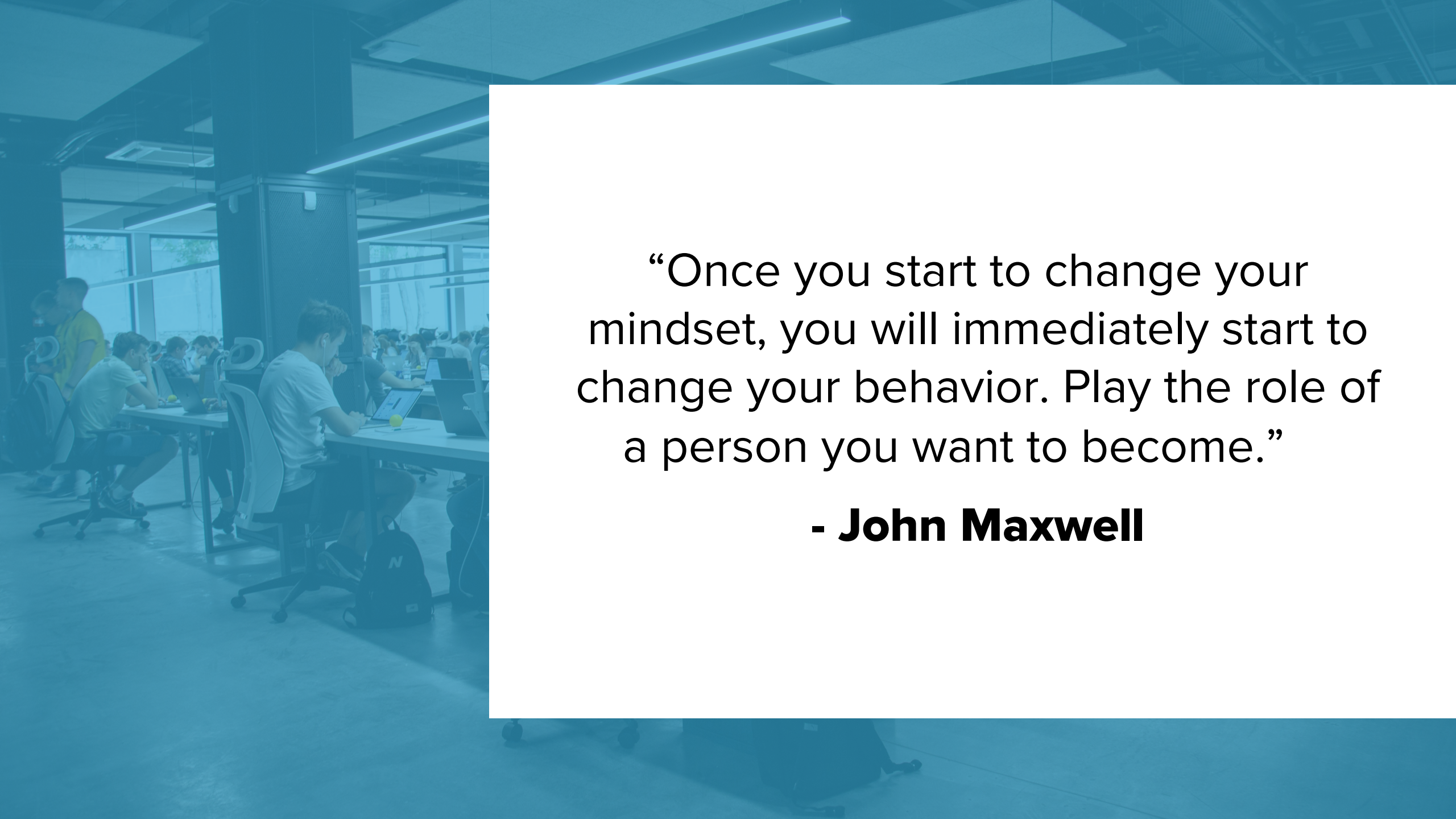
"If you don't drive your business, you will be driven out of business."

- B.C. Forbes

Entrepreneurship and Strategy

Skills related to understanding business situations and engaging in effective problem solving and decision making.

"Once you start to change your mindset, you will immediately start to change your behavior. Play the role of a person you want to become."

- John Maxwell

Behaviors
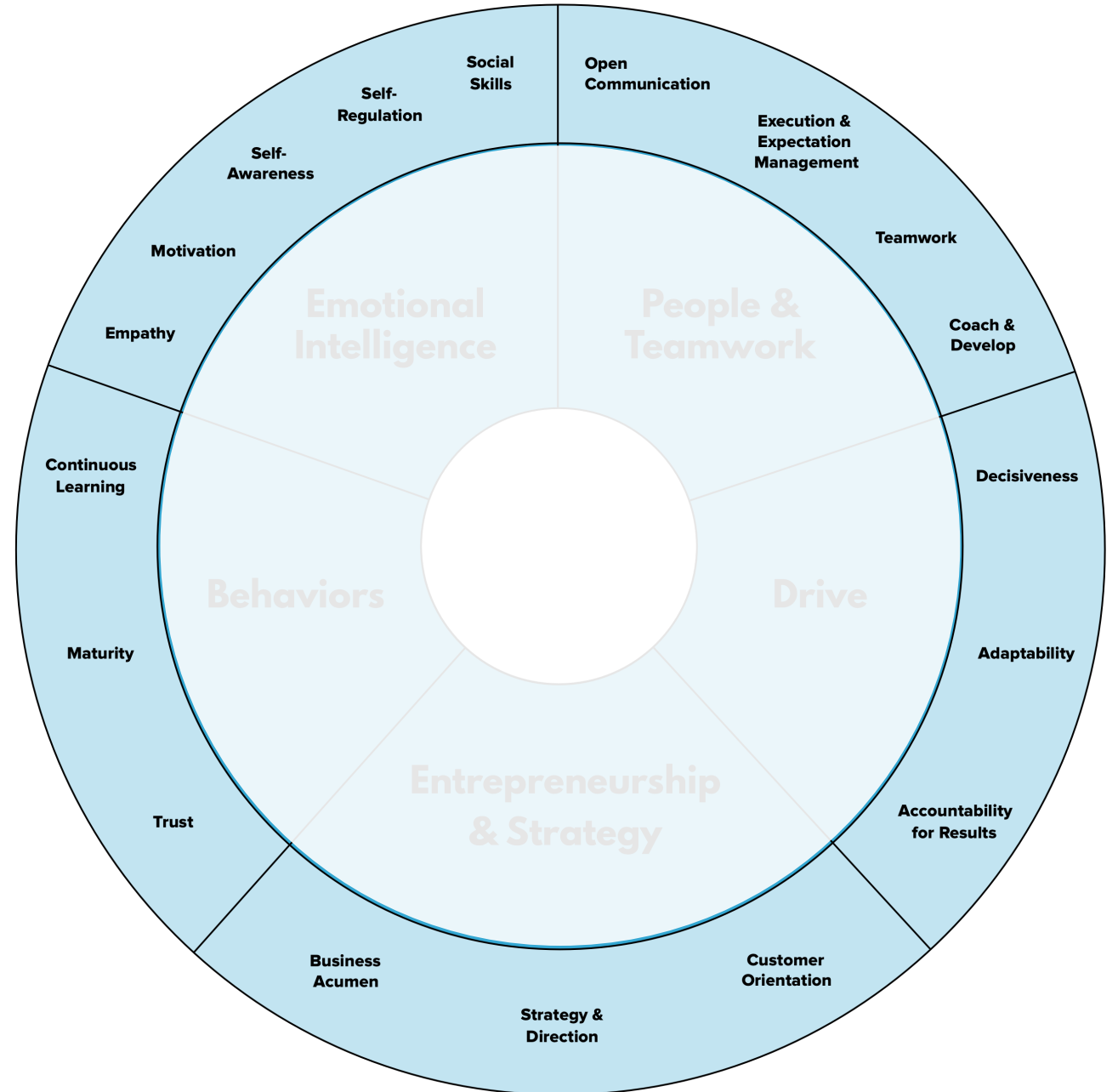
Critical behaviors utilized when dealing with others internally and with customers.

Eighteen core Skills.

Core Skills

The core skills that make up the disciplines required by world-class Customer Success Organizations and Professionals.

Emotional Intelligence

Emotional Intelligence (EI), also known as Emotional Quotient (or EQ), is the ability of an individual to recognize and control their own emotions and respond appropriately to those of others.

- Self-Awareness
- Self-Regulation
- Motivation
- Empathy
- Social Skills

People and Teamwork

Concepts focused on how people work together internally, sharing and fostering creative solutions to address issues, and establishing an environment of trust.

- Teamwork
- Coach and Develop
- Foster Open Communication
- Execution and Expectation Management

Drive

Skills that make up the internal motivation or personal "drive" for achieving goals and creating successful outcomes.

- Decisiveness
- Adaptability
- Accountability for Results

Entrepreneurship and Strategy

Skills related to understanding business situations and engaging in effective problem solving and decision making.

- Business Acumen
- Strategy and Direction
- Customer Orientation

Behaviors

Critical behaviors utilized when dealing with others internally and with customers.

- Continuous Learning
- Maturity
- Trust

Putting the model to work.

It all starts with the roles.

Two main reasons for this.

Hiring.

How do you currently define the jobs you're hiring for?

Talent Acquisition

How your talent acquisition approach is informed and improved through a competency-based approach.

Competencies & Skills

Job Role

Job Description

Assessment Rubric

Assessment Results

Nine-Box
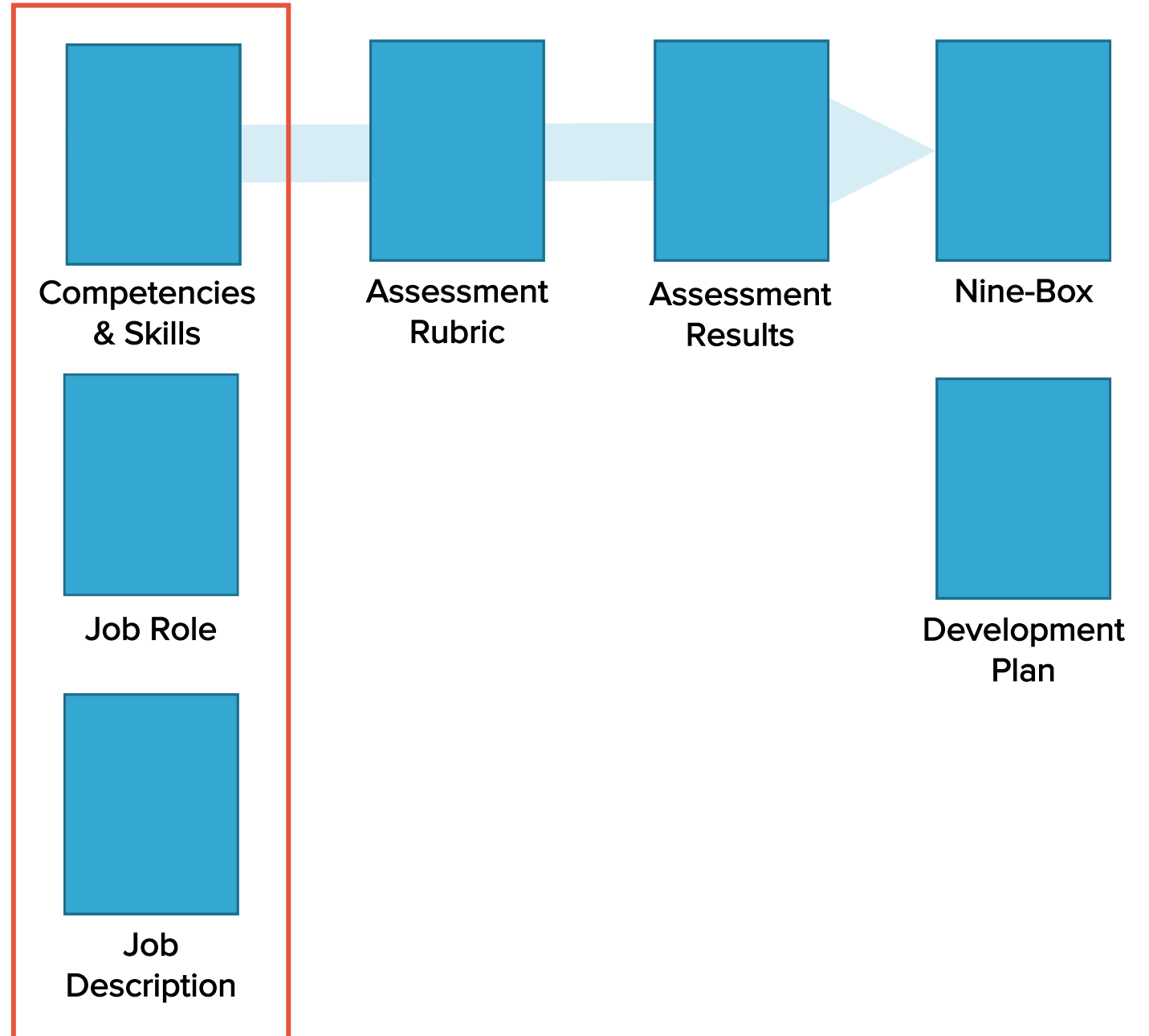
Development Plan

Evaluations and Development.

Talent Management

How your talent management approach is informed and improved through a competency-based approach.
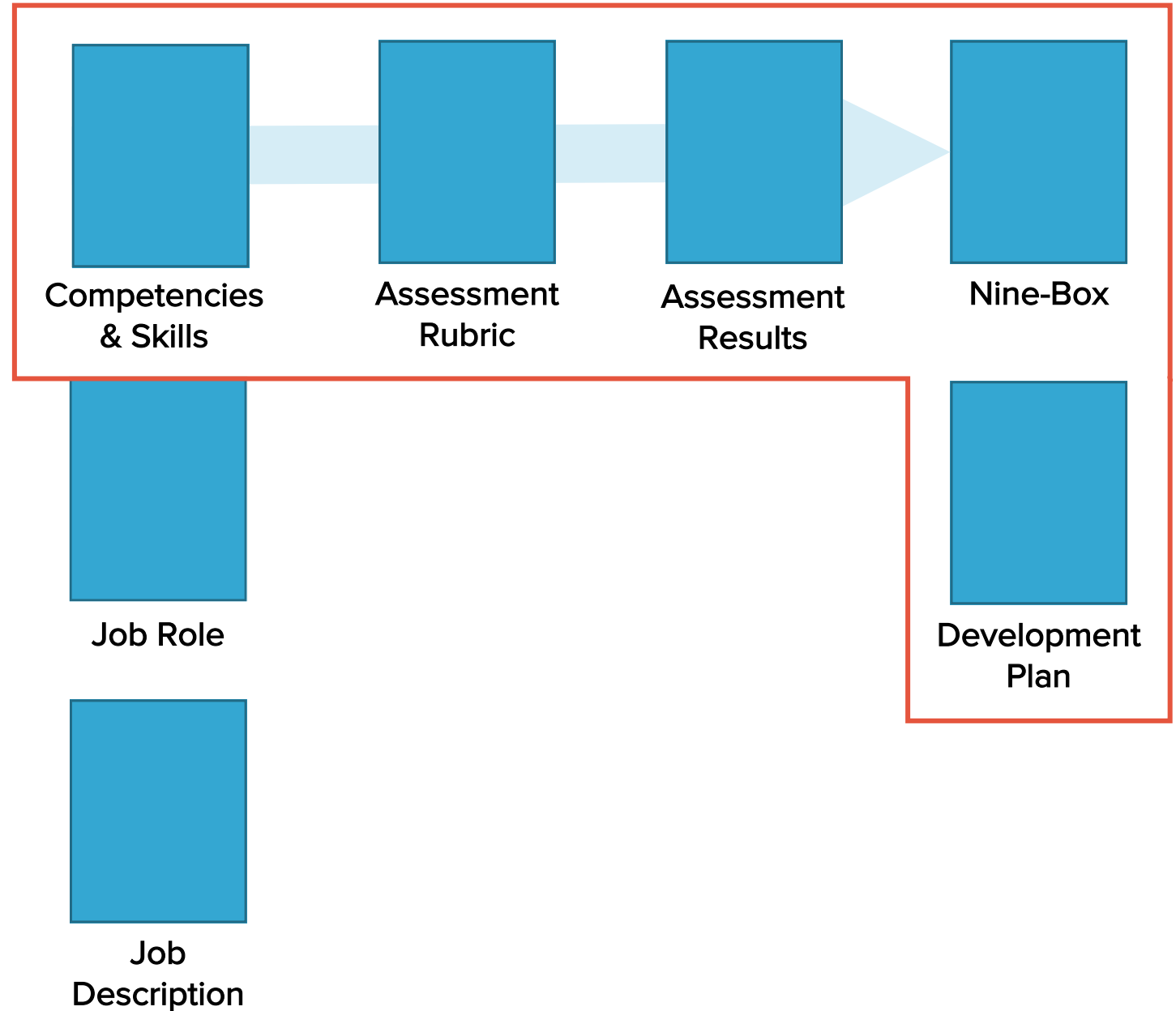
Four tips for defining effective job roles.

Get the job title right.

Be crystal clear on the purpose.

Set goals for the role.

Understand the competencies and skills the role requires.

Can you see how having that would make writing a Job Description easier?

Job Role vs. Description.

Exercises: Defining Job Roles and Competencies

What roles do you have in your organization?

Exercise

Define the current job roles in your organization.

- Title
- Purpose
- Goals

Getting Started

Ask yourself the following questions to get a clearer picture of the roles.

1. Write down all of your current roles
2. What functional expertise does the job require?
3. What are the specific work assignments for this job?
4. How does this role contribute to the achievement of the companies overall goals?
5. How will you determine performance for the role?

Getting It Done

Use the template provided to define the role.

1. What is the title?
2. What competencies are required?
3. What are the key skills required in the competencies?
4. What is the roles Purpose?
5. What are the goals for the person in the job role?

Defining Competencies and Skills.

Exercise

Define the competencies required for one of the current job roles in your organization using the template provided.

Competency: Project Management

Skills:

- Budget Planning [3]
- Project Planning [3]
- Risk Management [3]
- Scheduling [3]
- Task Delegation [3]
- Task Management [3]

Questions to Think About

When getting started building your list of competencies required for the role think about these three things.

1. What domain specific knowledge is required for the role?

2. What specific technical knowledge is required for the role?

3. At what level do they need to be proficient in these to succeed?

Getting Started

Ask yourself the following questions to get a clearer picture of the competencies required for the role.

1. What functional expertise does the job require? Write out everything that comes to mind as a braindump

2. At what level do they need to be proficient (using a 1-5 scale)?

3. What are the specific work assignments for this job that require specialized knowledge?

4. Are these crucial or "nice-to-haves"?

Proficiency Level

The Proficiency Scale is a means to measure an employees ability to demonstrate a competency on the job.

1. Fundamental Awareness (Basic Knowledge)
2. Novice (Limited Experience)
3. Intermediate (Practical Application)
4. Advanced (Applied Theory)
5. Expert (Recognized Authority)

Example

Use the following example competency and underlying skills to guide your work.

Competency: Project Management

Skills:

- Budget Planning [3]
- Project Planning [3]
- Risk Management [3]
- Scheduling [3]
- Task Delegation [3]
- Task Management [3]

Job Description Gap Analysis.

Exercise

Review your current job description against the job role the you just defined.

Customer Success Manager
San Mateo, CA

The WidgetWorks Customer Success (CS) team is dedicated to delivering a world-class experience to our customers. We help customers embrace quarterly and transparent goal setting, adopt performance management best practices, and ultimately generate significant value from the WidgetWorks solution. The Customer Success Manager (CSM) is a vital, customer facing role within the team, ultimately owning the customer relationship and designing the account strategy. The Customer Success Manager role reports to the Director of Customer Success.

Key Responsibilities

- Establish a trusted/strategic advisor relationship with your customers by building a program vision and providing value throughout the customer partnership as they deliver on their program roadmap.
- Engage closely with the Program Lead and Executive Sponsor at each customer, as well as other strategic leaders that influence the direction of the program.
- Act as the voice of the customer internally. As the steward of the customer relationship, a CSM is expected to work cross-functionally with Marketing, Sales, Product, and Engineering to ensure a consistent and strong customer message is embedded in our processes.
- Partner closely with Professional Services and Education to deliver implementation projects and training services.
- Identify and forecast expansion opportunities and partner with Sales to successfully close such opportunities.
- Creatively analyze and drive adoption within the customer base, including engaging departmental leaders who are utilizing the solution well as well as those whose adoption is lacking.
- Diagnose program risks and take action to solve or mitigate such risks.
- Identify key customer advocates that can act as a marketing channel through case studies, speaking opportunities, references, etc.
- Monitor and achieve group KPIs including but not limited to: renewal %, upsell %, monthly active usage, and NPS.

Required Experience & Skills

- 3+ years of experience in Customer Success, Consulting, Sales or related field
- Exceptional client management and communications skills
- Understand the SaaS business model and have experience delivering and implementing SaaS solutions for enterprise customers.
- Familiarity working with customers of all sizes
- Willingness to travel to customer locations as needed
- Strong presentation, meeting facilitation, and written communication skills

Getting Started

Ask yourself the following questions to get a clearer picture of the alignment between your job description and the job role you just defined.

1. Does the job description clearly convey the purpose of the job?

2. Do the requirements and experience highlight the key competencies required for the role?

3. Does the job description speak to the mission of the company and explain how the role will contribute to the achievement of the companies overall goals?

4. Does the job description highlight how the role will be evaluated for performance?

Getting It Done

Evaluate your current job description for alignment with the job role as defined.

1. Highlight the areas of your job description that address the four crucial elements that define a role.

2. Do the competencies/skills listed align with your job role?

3. Highlight any gaps and/or misalignments.

Rate the Current Job Description

How would you rate the current job description?

Using a 1-5 scale, rank your current job description:

1. Very Aligned
2. Aligned
3. Somewhat Aligned
4. Needs Work
5. OMG

Defining Performance.

What is a rubric?

A tool used to interpret and assess employees against established criteria and standards.

What does a rubric look like?

A rubric has three parts.

Emotional Intelligence

Criteria that describe the skill or competency

Self-Awareness

	Rating	Needs Improvement [1]	Below Expectations [2]	Meets Expectations [3]	Exceeds Expectations [4]	Exemplary [5]
Awareness of own strengths	1	Unable to identify own strengths	Struggles to identify own strengths	Can identify own strength but with difficulties	Can easily identify own strengths	Can easily identify own strengths and prioritize them
Behavior guided by morals	1	The employee's actions are not at all guided by morals	Only few of the employee's actions are guided by morals	About half of the employee's actions are guided by morals	Most of the employee's actions are guided by morals	The employee's actions clearly reflect his/her core values

	Rating	Needs Improvement [1]	Below Expectations [2]	Meets Expectations [3]	Exceeds Expectations [4]	Exemplary [5]
Goals and rewards	1	Unable to achieve his/her goals and does not reward oneself for progress	Struggles to achieve his/her goals and does not consistently reward oneself for progress	Able to achieve some of his/her goals and uses rewards for progress.	Able to achieve most of his/her goals and uses rewards for progress most of the time	No difficulties in setting and achieving goals and consistently uses rewards for progress.
Decisions on personal change	1	Can't come up with ways to change or is overwhelmed by choices.	Struggles to come up with ways to change or to decide which ones to use	Can come up with some ways to change and is able to decide which ones to use but with difficulties	Can come up with ways to change and is able to decide which ones to use most of the time	Can easily come up with ways to change and has no problems to decide which ones to use

Motivation

	Rating	Needs Improvement [1]	Below Expectations [2]	Meets Expectations [3]	Exceeds Expectations [4]	Exemplary [5]
Confidence in own abilities	1	No confidence in own abilities to achieve goals and predominantly focused on failure	Low confidence in own abilities to achieve goals and highly focused on failure	Some level of confidence in own abilities to achieve goals and somewhat focused on failure	Confident in own abilities to achieve goals and not overly worried about failure	Highly confident in own abilities to achieve goals and not at all worried about failure
Willing to go the extra mile	1	Employee works as little as possible	Employee works as little as possible with few exceptions	Employee is willing to do a limited amount of extra work	Employee is willing to do substantially more work than required	Employee is willing to go the extra mile to keep everyone happy

Emotional Intelligence

Rating scale for performance levels

Self-Awareness

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Emotional Intelligence

Indicators for each for performance level and criteria

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Two reasons why we recommend rubrics.

1

Makes assessment criteria and expected performance standards explicit.

Removes subjectivity and inconsistency from assessments.

Exercises: Creating and Using Rubrics

Creating your first rubric.

Getting Started

Ask yourself the following questions to get a clearer picture of the roles.

1. Pick a competency that you identified in the earlier exercise

2. Select 1-3 critical skills that are associated with the competency

3. Enter the skills in the criteria area of the rubric template

Getting It Done

Use the template provided to define the role.

1. Select a skill from those you just entered in the rubric

2. Determine what your "Meets Expectations" level of performance would be as it relates to the skill

3. Build out remaining levels of performance based on your "Meets Expectations" level of performance

Example

Use the following example competency and underlying skills to guide your work.

Criteria: Risk Management

Level: Meets Expectations

Performance Criteria:

Identifies and assesses the impact and likelihood of risks to achieving business objectives. Monitors the effectiveness of actions taken to manage identified risks and intervenes as appropriate.

Competency-based Review.

Exercise

Conduct a competency-based review of a current team member.

Emotional Intelligence

Self-Awareness	Rating	Needs Improvement [1]	Below Expectations [2]	Meets Expectations [3]	Exceeds Expectations [4]	Exemplary [5]
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Empathy		Needs Improvement [1]	Below Expectations [2]	Meets Expectations [3]	Exceeds Expectations [4]	Exemplary [5]
Feels and expresses empathy	1	Is unable to relate to others' problems and shows no empathy in discussions	Has difficulties to relate to others' problems and shows little empathy in discussions	Is able to relate to others' problems in some circumstances and shows some level of empathy in discussions	Is able to relate to others' problems most of the time and generally shows empathy	Is almost always able to relate to others' problems and generally shows high empathy

Social Skills		Needs Improvement [1]	Below Expectations [2]	Meets Expectations [3]	Exceeds Expectations [4]	Exemplary [5]
Considerate of others	1	Shows no consideration of others' well-being and does not strive for best solution for everyone	Is rarely considerate of others' well-being and does not usually strive for a solution that benefits everyone	Is able to show consideration of others' well-being in certain situation and cares about the consequences of his/her actions	Shows consideration of others' well-being in most situations and generally cares about the consequences of his/her actions	Generally shows high levels of consideration of others' well-being and cares about the consequences of his/her actions

Emotional Intelligence Score 1.00

Getting Started

Utilize the provided review template to conduct a competency-based review.

1. Select a member of your CSM team that you are familiar with
2. Utilizing the rubric-based review template, complete a review of the resource
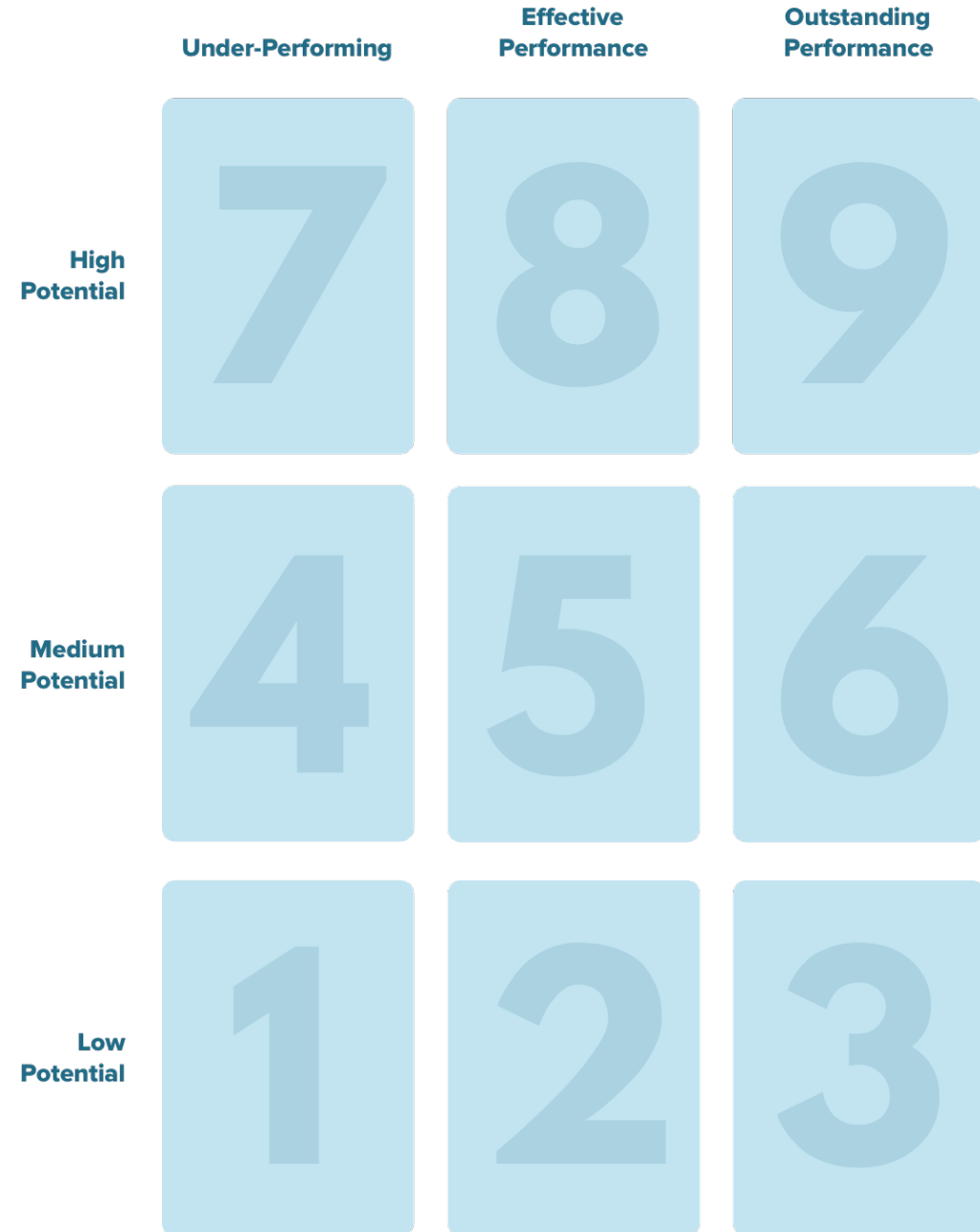3. Review the results in the overview tab

Evaluating Performance and Potential.

Evaluations are pointless without understanding and action.

Why use the Nine-box?

Standards.

Dialogue.

Structure.

Culture.

Exercise: Using The Nine-Box

Your first Nine-box evaluation.

Exercise

Evaluate the same team member that you used in the prior exercise.

	Under-Performing	Effective Performance	Outstanding Performance
High Potential	7	8	9
Medium Potential	4	5	6
Low Potential	1	2	3

Getting Started

Evaluate the team members place on the Nine-box..

1. Categorize the team members performance: *Under-performance, Effective Performance or Outstanding Performance*

2. Categorize the team members potential: *Low Potential, Medium Potential or High Potential*

3. Place them on the Nine-box and determine if the placement reflects your assessment

Planning with 6's and 9's.
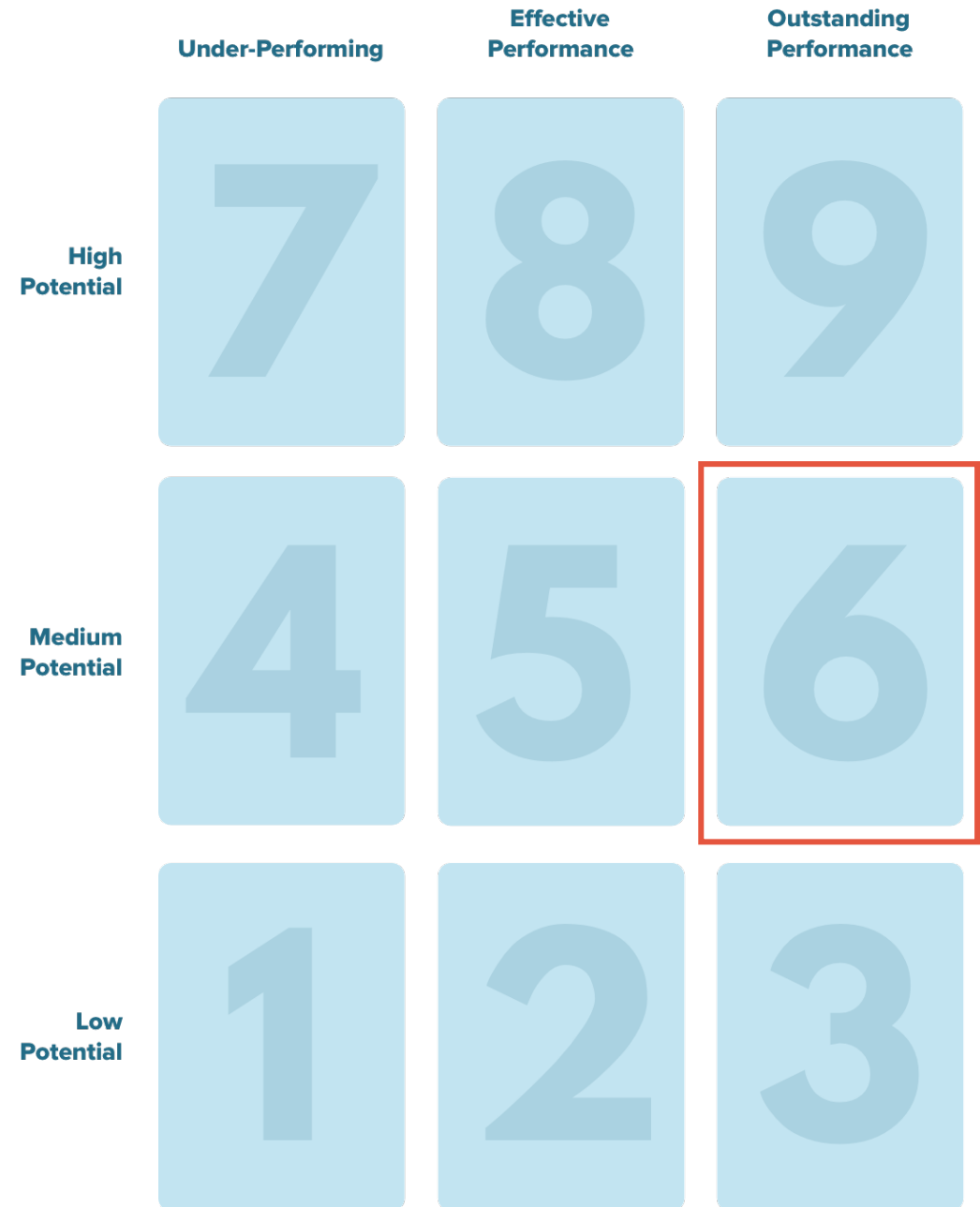
1's, 2's and 3's

The shallow end of the talent pool.

	Under-Performing	Effective Performance	Outstanding Performance
High Potential	7	8	9
Medium Potential	4	5	6
Low Potential	1	2	3
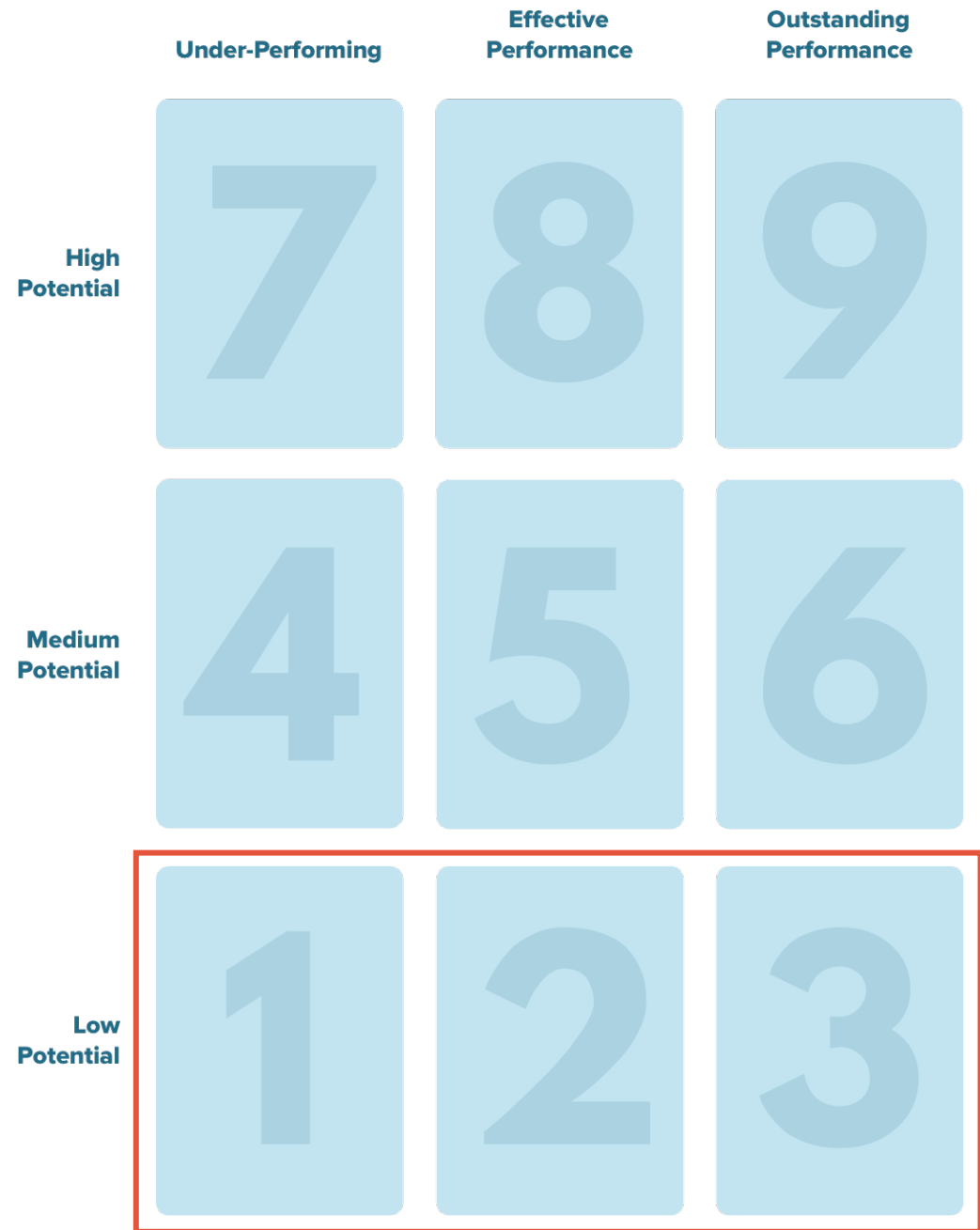
The 4's and 5's

Stuck in the middle.
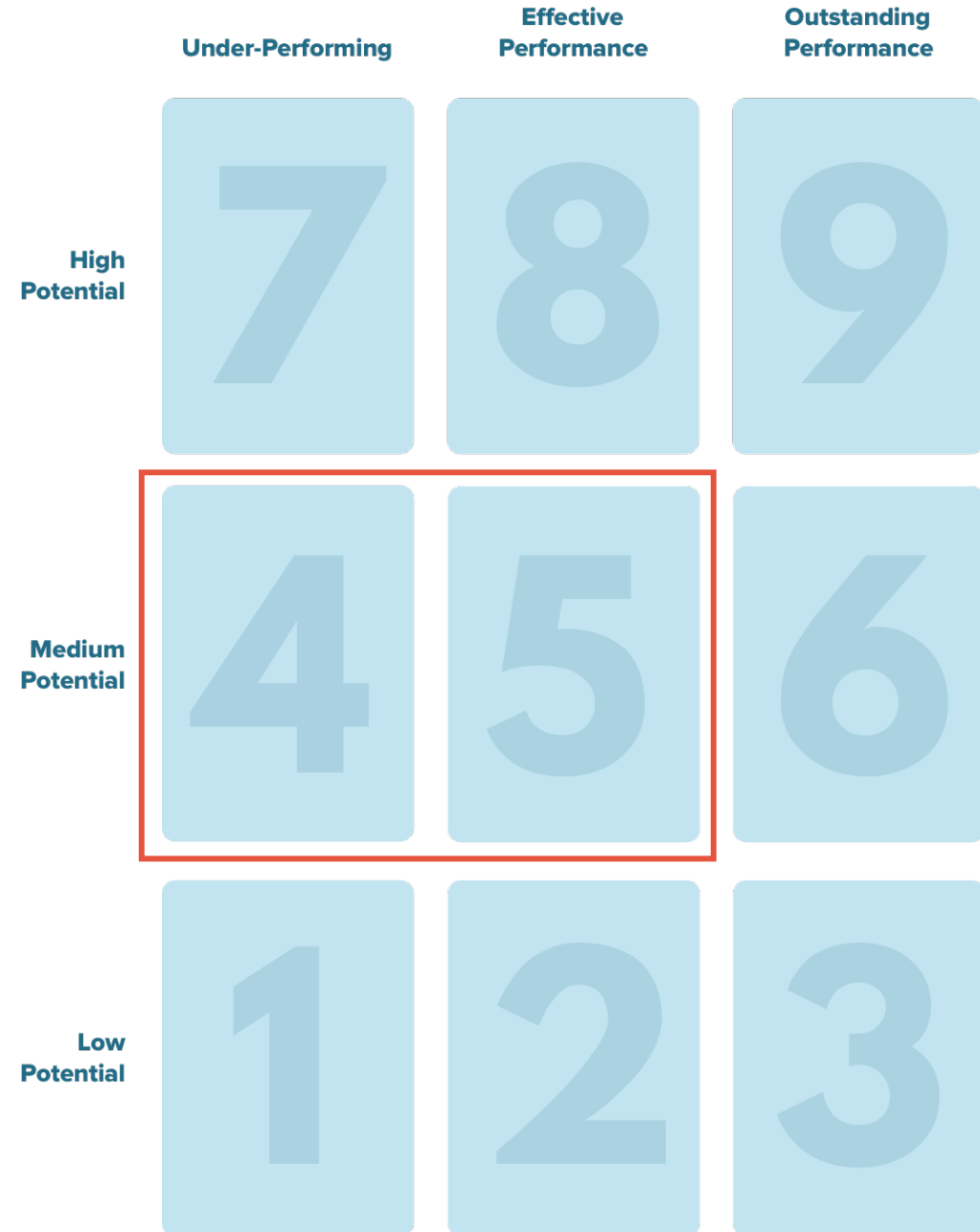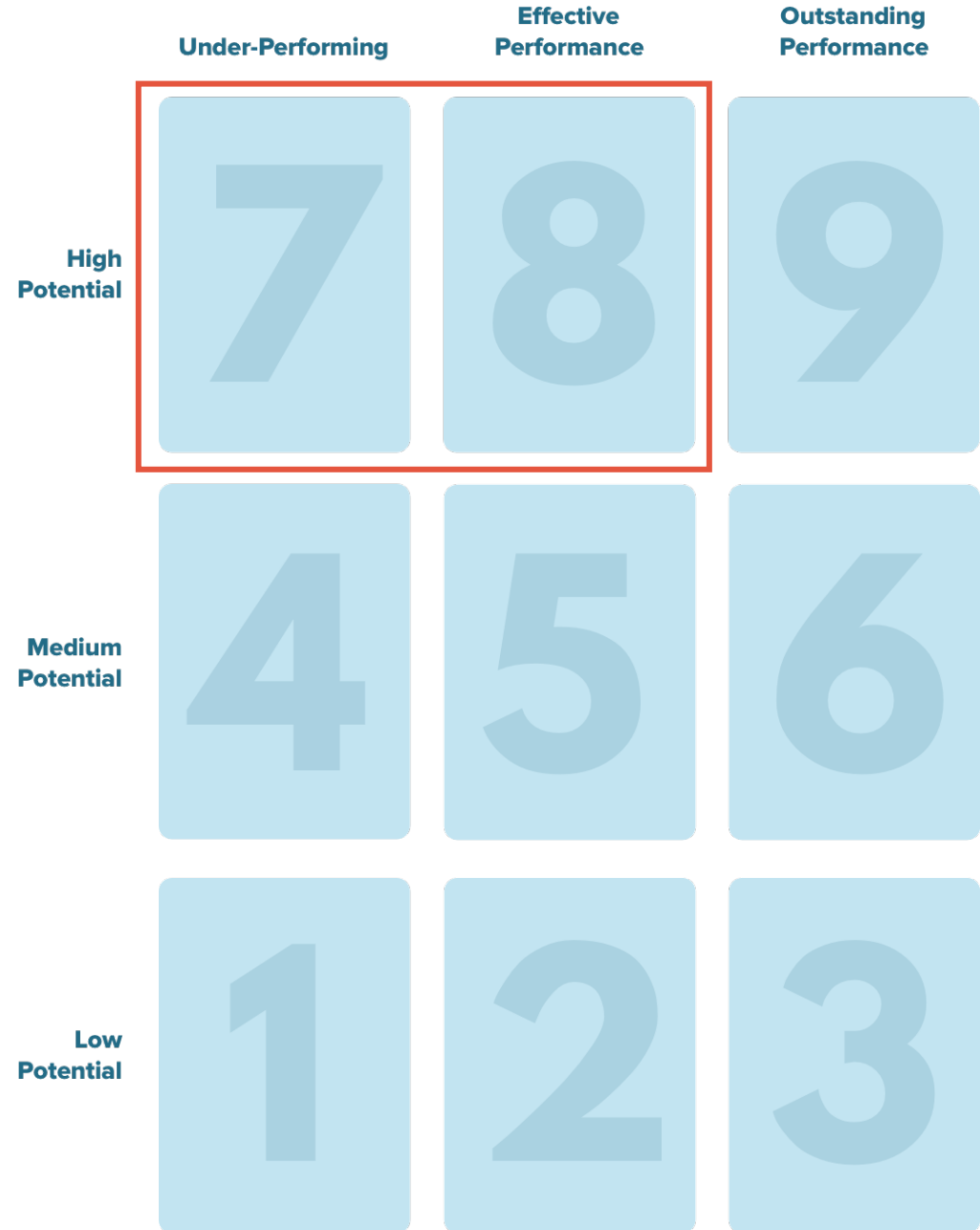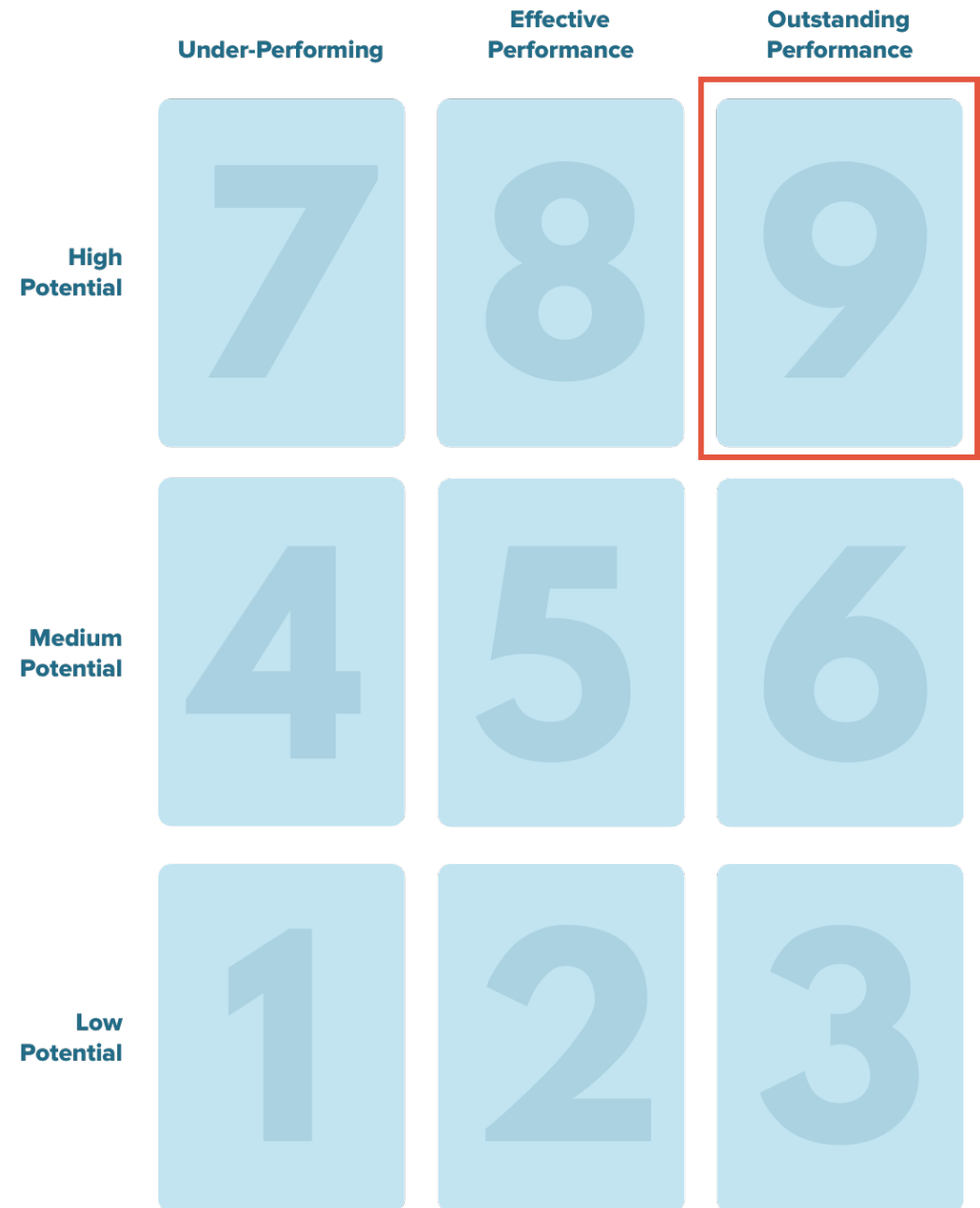
Next Steps.

Building a performance assessment program.

Questions?

What You Learned in Todays Session

1. A model for quantifying the skills your team needs to succeed at their job
2. Discovered how to perform more robust evaluations of your team
3. Learned how to adapt and apply this model to assess, evaluate, develop and improve your hiring approach

SuccessHACKER

customersuccess.community
successcoaching.co
successhacker.co