Who's Heard This Before?

$2 Million ARR / CSM

THERE IS NO

ONE-SIZE-FITS-ALL CUSTOMER SUCCESS RATIO MODEL

START WITH THE CUSTOMER LIFECYCLE

2. EXECUTE

Customer and User onboarding and training. Assist with strategy and configuration to align with core use cases. Establish an initial win.

01

03

1. ALIGN

Confirm success criteria and align on measurement of KPIs. Set proper expectations for the partnership and establish clear roles and responsibilities.
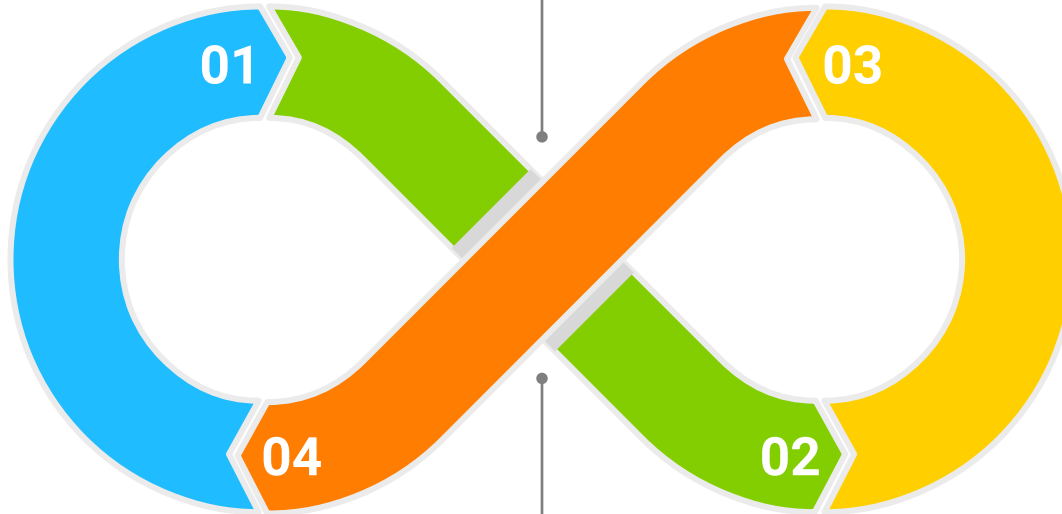
3. REALIZE

Customer has adopted ClientSuccess into their workflow. Product usage is in line with their business objectives and they are working towards their goals.

04

02

4. ADVOCATE

Customer has expressed their intention to renew and/or grow and has agreed to serve as an advocate for ClientSuccess.

DETERMINE CUSTOMER SEGMENTATION

1

SIZE

How large is the organization? Employee size? Revenue size? Customer base?

2

SPEND

What is the customer's current or future investment in the partnership?

3

INDUSTRY

What industry are they in? What vertical are they in? What businesses do they serve?

4

USE CASE

What products have they purchased? What objectives do they have? What are their core use cases?

5

MATURITY

Where are they in their maturity journey? What resources do they have? What focus does this initiative have?

CALCULATE THE TIME FOR EXPERIENCE

HIGH (2-3)
MEDIUM (1-2)
LOW (0-1)

ONBOARDING

RECURRING CADENCE

TRAINING & ENABLEMENT

COR MEETING

30 POINT INSPECTION

RISK MANAGEMENT

RELATIONSHIP DEVELOPMENT

RENEWAL MANAGEMENT

SUCCESS PLANNING

AVERAGE TIME PER WEEK LIFECYCLE STAGE

2. EXECUTE
2 HOURS

01

1. ALIGN
3-5 HOURS

03

3. REALIZE
1 HOUR

04

02
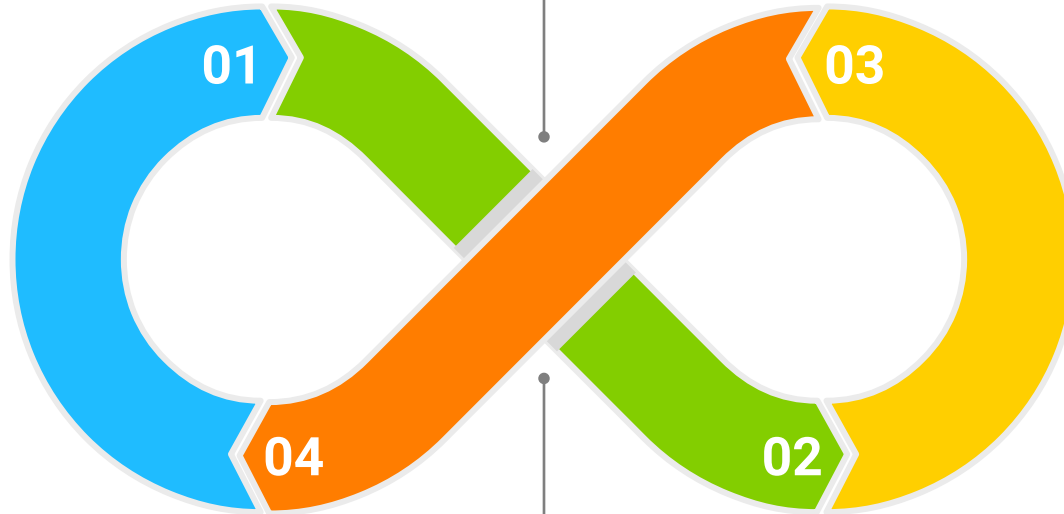
4. ADVOCATE
1 HOUR

YEAR 1 EXAMPLE

CUSTOMER TIME MANAGEMENT

REDUCED SCOPE = 45 CUSTOMERS

Due to modified lifecycles some customers will require ½ the time for support

ESTIMATED 30 CUSTOMERS

30 hours per week and 1 hour per customer would allow a CSP to manage 30

AVG. HRS/WEEK/CUSTOMER = 1 HOUR

Based on the Customer Lifecycle we've determine that on average 1 cus = 1 hr

75% = 30 HRS/WEEK

On average, 75% of a CSPs time should be allocated to customer work

40 HOUR WORK WEEK

Consider the average hours in your standard work week

DATA TO CONSIDER

AVERAGE ARR
PER CUSTOMER

AVERAGE
CSP SALARY
BY SEGMENT

CROSS-
FUNCTIONAL
SUPPORT

CUSTOMER
SENTIMENT
AND FEEDBACK

ECONOMIC VIABILITY

AVERAGE ARR PER CUSTOMER

Determine the average ARR per customer segment and multiply that by the # of Customers

AVERAGE CSP SALARY

Looking at the CSPs in each segment, determine the average salary

ECONOMIC VIABILITY

Looking at the CSPs in each segment, determine the average salary

ECONOMIC VIABILITY

AVERAGE ARR PER CUSTOMER

$30,000
x 45 =
$1,350,000

AVERAGE CSP SALARY

$100,000

ECONOMIC VIABILITY

7-10%

AUGMENTED ENGAGEMENT BY SEGMENT

AUTOMATION

Review all of your processes and determine what can be automated including communication.

2

LEVERAGE MARKETING

Embrace Customer Marketing to help support product adoption, customer advocacy etc.

4

1

SCALE PROGRAMS

Consider launching a training and enablement series, pre-recorded onboarding videos etc.

3

IN-APP GUIDES

Assist your customers where they're spending all of their time. Use in-app communication to assist them at scale.

5 RATIO DESIGN MISTAKES TO AVOID

1.
THINKING ONE SIZE FITS ALL

2.
NOT CONSIDERING CUSTOMER EXPERIENCE

3.
NOT CONSIDERING FINANCIAL VIABILITY FOR THE BUSINESS

4.
NOT OPTIMIZING THE EXPERIENCE TO INCREASE RATIOS

5.
NOT REVISITING OVER TIME TO ENHANCE

THANK YOU