

CUSTOMER SUCCESS LEADERSHIP BOOTCAMP

MOVING TO A POOLED CUSTOMER SUCCESS MODEL

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DESIGN A CUSTOMER
ENGAGEMENT MODEL THAT
WORKS FOR YOUR CUSTOMERS
AND YOUR BUSINESS.

WHY DO SO MANY COMPANIES FAIL?

ASSUMPTIONS

Organizations design teams and engagement models around what they THINK the customer needs/wants.



1

LACK OF VALUE

Customers do not need to meet for the sake of meeting; if there is not some real value being delivered it's a waste of time.



3

2



WRONG RESOURCES

Companies believe that CSM engagement at all points in the journey make the most sense; most likely need technical resources, training or enablement, or technical support.

4



NO DIVERSITY

Having the same person service and support your customer for long periods of time can prevent long term value. Introduce new perspectives and experiences.

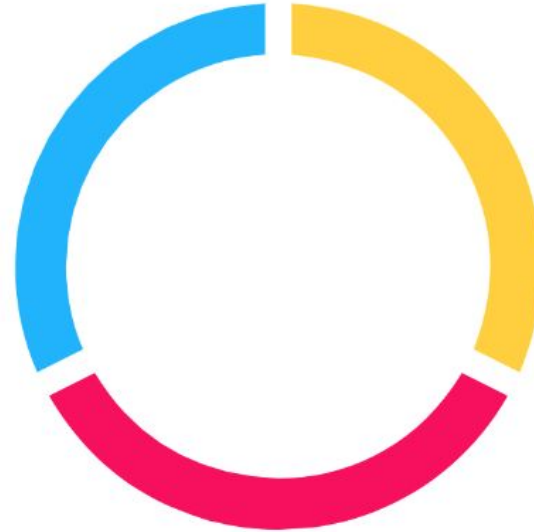
ENGAGEMENT MODEL CONSIDERATIONS



START WITH YOUR CUSTOMER LIFECYCLE

Enablement

Align with our customers on expectations and success criteria. Assist them in the building of their CS Programs in ClientSuccess and enable the team to successfully adopt it into their workflow.



Adoption

Focus on our customers operationalizing their workflows in ClientSuccess to drive value and mitigate risk for their customers. Be able to articulate time savings and stronger engagement.

Advocacy

Focused on the value realization of our customers ensuring that they will continue and grow with the partnership and serve as advocates for the brand.

MAKING THE MOVE TO A POOLED MODEL

DETERMINE COVERAGE

Figure out if all CSMs will be pooled, or certain CSMs, if it will be day ownership or spread out.



EARLY WARNING SIGNALS

Ensure you have a way to understand customer behavior to monitor and intervene appropriately.



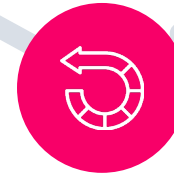
COMMUNICATION

Determine how you will manage communication internally and externally while you work through the changes.



ADDITIONAL RESOURCES

In addition to your CSMs, determine what other resources you have to make available for customers.



NEW PROCESSES

You will likely need to design and define new processes to properly manage customers.

DETERMINE COVERAGE

- Will you offer a pooled Customer Success model for all customers or a specific cohort of customers?
- Do you envision all of your CSMs participating in the pooled model or a specific CSMs?
- Will pooled coverage hours be available every day or specific days?
- Will you have CSM calendars pooled together or will customers have the option of booking with specific CSMs?

Plans at ClientSuccess

Two cohorts of customers - half will have designated CSM support and the other will have pooled resources

All CSMs will participate in the pooled CSM model

Pooled hours will be offered by default on Tuesday, Wednesday and Thursday with accommodations for emergencies

CSMs will have designated coverage days but customers will have 1 calendar to book from based on their needs and availability

ADDITIONAL RESOURCES

- What resources will you be able to provide your customers to get immediate access to resources and content?
- What will your 1:Many approach look like?
- What new content will you create to support your customers?
- How will you leverage cross-functional teams to support this new initiative?

Plans at ClientSuccess

We are deploying a Customer Community, CS Connect, to connect our customers with each other, with our team and with information

We will offer 3 series of 1:Many content - technical office hours, CSM lead sessions to brainstorm strategies and leadership sessions

We've created a new Onboarding Portal to create a streamlined onboarding experience, rich with content and templates to help customers move quickly

All teams will support the strategy. Sales with engagement, marketing with content, product with innovation, leadership with relationships, and support with content

EARLY WARNING SIGNALS

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- How will you keep track of customer health?
- What will engagement need to look like in the new model?
- When there is risk who will be responsible for intervention?
- Who will own the ongoing risk of the customer?

Plans at ClientSuccess

Designing a new customer health score with metrics more focused on engagement with the community, product adoption, sentiment and overall usage

Historically we worked to maintain a bi-weekly cadence for our customers; we now are looking for them to engage with a CSM every 45 days

Initial risk flags will trigger automations to ensure that there is immediate action followed by the pooled CSM or executive sponsor based on the risk impact

Depending on the customer and risk as well as the path to resolve the owner can be a CSM to temporarily own until we resolve the issue

NEW PROCESSES

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- What processes will you need to modify to accommodate the new strategy?
- How will you track which customers will be managed which way?
- What is the plan to track the impact of the new processes?
- When will you work to mitigate the impact based on what's working and what's not?

Plans at ClientSuccess

We are starting with a modified Onboarding experience for all customers, new renewal process, different survey strategy and new risk playbooks.

We will create new customer segments, health scores, reporting dashboards and pulse reason codes

We will track all lifecycle management through SuccessCycles, reports and health score impact

The first 90 days we plan on collecting feedback from customers and the frontline team early and often and will modify as needed. Days 60-120 we will measure.

COMMS

- What is your internal communication strategy? How do you plan on getting cross-functional buy in?
- What is your customer communication plan?
- How will you collect customer feedback on the new strategy?
- How are you going to continue to have open lines of communication with customers in lieu of a CSM?

Plans at ClientSuccess

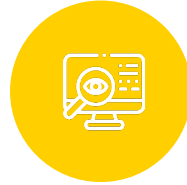
Initial discussions started with the CX org to ensure their support and buy-in. Internal communication started at the leadership offsite to gain support and buy-in and has flowed IRT	Customers will be notified of upcoming changes via email and encouraged to attend a webinar to cover all the details; async comms will also be sent out and in app as well	New feedback loop that will allow us to collect customer sentiment early and often, exec outreach to discuss the program and CSM pulse during engagements	Ongoing communication will be managed through email, automation, in-app messaging, webinars, community and 1:1 engagement as needed
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THINGS TO CONSIDER



CAN WE SUPPORT IT?

Do you have the right resources to execute this correctly?



IS NOW THE RIGHT TIME?

Maybe this is the right approach but you need to think about if now is the right time to roll it out.



IS THIS RIGHT?

It's easy to hear about a new strategy that sounds like it solves your problem but consider if it makes sense for your business.



CAN WE TRACK IT?

You can't manage what you can't measure. Do you have the right tools in place to track the impact of these changes?



5 WAYS TO FAIL AT YOUR POOLED MODEL

1.

DESIGN A PROGRAM THAT LEAVES CUSTOMERS FEELING LIKE THEY ARE GETTING LESS

2.

RELY ON THE SAME PROCESSES THAT YOUR TEAM USED IN A HIGH ENGAGEMENT MODEL

3.

FAILURE TO BRING IN AUTOMATION INTO YOUR CUSTOMER LIFECYCLE

4.

NO WAY TO MEASURE ENGAGEMENT, CUSTOMER BEHAVIOR AND SENTIMENT

5.

MISMANAGE COMMS WITH CUSTOMERS AND INTERNAL TEAM MEMBERS

THANK YOU