

CUSTOMER SUCCESS LEADERSHIP BOOTCAMP

NEW CSM ONBOARDING

HOW TO GET YOUR NEW CSM RAMPED WITHOUT A FORMAL TRAINING TEAM

TUESDAY, AUGUST 2nd, 2022
1PM EST/ 10AM PST



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Chief Customer Officer
ClientSuccess

brought to you by

client**success**

EMPLOYEE SUCCESS

=

CUSTOMER SUCCESS

As a Leader, you're responsible for
providing your employees with
everything they need to be
successful.

The most important thing they
need is **information**.

EMPLOYEE KNOWLEDGE JOURNEY

INDUSTRY KNOWLEDGE

Ensure they are well versed on your industry and who you serve.

PRODUCT KNOWLEDGE

Train them thoroughly on your solution. Make sure they understand the value prop behind it.

COMPANY KNOWLEDGE

Each employee should know everything they need to know about the company.

CUSTOMER KNOWLEDGE

Understand who your customers are, the challenges they are looking to overcome and how they are successful.

PROCESS KNOWLEDGE

Train them on core processes that will be critical to the success of their role.



LEVERAGE WHAT YOU HAVE



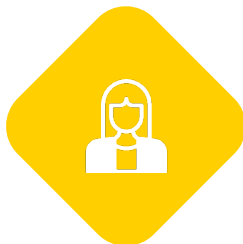
COMPANY KNOWLEDGE

- Website
- Crunchbase
- G2
- LinkedIn
- Google
- Dunn & Bradstreet



INDUSTRY KNOWLEDGE

- Accredited organizations
- Google
- Forums & Community Boards
- Professional Associations
- Whitepapers



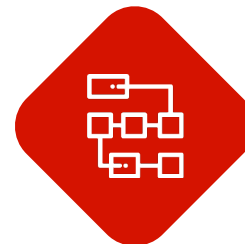
CUSTOMER KNOWLEDGE

- Read customer feedback
- Review product ideas
- Review analytics to see behaviors
- Interview a few customers
- CRM/ Customer Success Platform



PRODUCT KNOWLEDGE

- Record onboarding and product training calls
- Knowledge Base
- Shadow CSM
- Shadow Support
- Shadow Onboarding



PROCESS KNOWLEDGE

- Key processes should be documented for reference
- Partner with cross-functional team on process communication

KEY STAKEHOLDERS

MARKETING

Educate the CSM on how Marketing supports the customer base and builds advocate programs.



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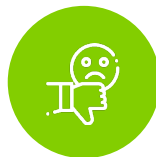
CUSTOMER EXPERIENCE

What is the role of Support, Onboarding, Professional Services, CS, AMs, Renewal Managers with CS?



4

1



SALES

3



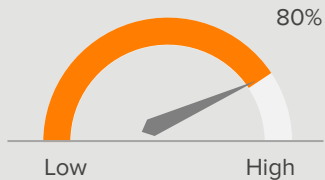
PRODUCT

What does the sales process look like?
How do we determine good-fit customers?
What is our sales strategy?

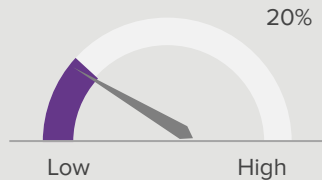
Product feedback loop? Product roadmap and release cycle? Product escalations and pipeline management?

DATA MANAGEMENT

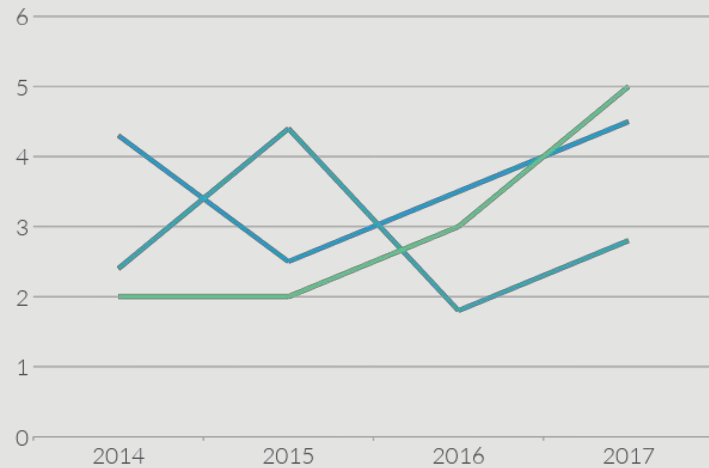
RENEWAL RATE



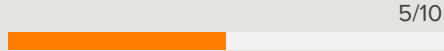
CHURN RATE



NRR VS. GRR VS. LOGO RETENTION Y-O-Y



PRODUCT 1



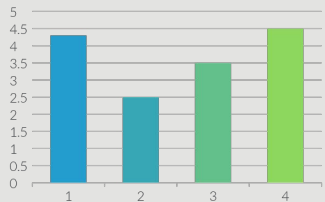
PRODUCT 2



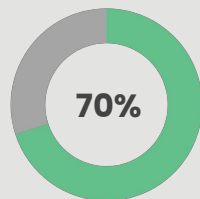
PRODUCT 3



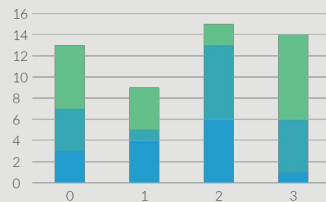
SEGMENT REVENUE



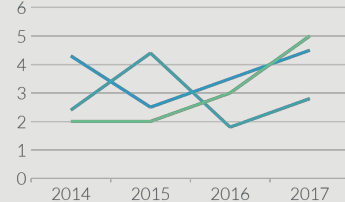
LOGO RETENTION



UPSELL & EXPANSION




CUSTOMER HEALTH



EXPECTATIONS

Deep understanding of your customer - Who they are, who they serve and what they want to achieve with the partnership. Stay abreast of changes to them and their industry.	Strong, Strategic and Diverse Relationships - Foster meaningful relationships with all key contacts; align with Executives and navigate changes efficiently	Product Expert - Solid understanding of the product, it's core use cases, platform nuances and core value drivers. Ability to train and enable end users with ease.	Act with Urgency - Move quickly and thoughtfully when partnering with customers.	Effective Communication - Communicate with thoughtfulness and brevity; never position against the product; proactive, timely follow up, professionalism and value driven
Intellectual Curiosity - Demonstrate innate curiosity in all situations with customers. Ask questions and always seek to understand. No assumptions ever!	Strong Technical Aptitude - Understand the technical nuances of the ClientSuccess platform; be able to internalize the technical jargon and workflows of the customer's technical ecosystem.	Internal Voice of Customer (VOC) - Ensure that you are serving as the voice of the customer internally to help influence decision making and drive organizational strategy.	Renewal Manager - Proactive orchestration of the defined renewal framework. Identify risk and opportunity early and manage through to successful execution.	Trusted Advisor - Leveraging the trust equation, develop deep rooted relationships with customers anchored on this methodology.
Brand Advocate - Support the industry promotion of ClientSuccess. Champion the product, the brand, the people in all areas.	Program Manager - Manage the program to help ensure your customers follow the change management required to successfully adopt the platform into their workflow to achieve their goals.	Customer Journey Orchestration - Effectively manage the customer's journey through our success framework. Manage key milestones supporting their goal achievement.	Growth Manager - Identify growth opportunities that strategically align with your customers business goals, needs and growth. Execute contract, align on goals, train and enable.	Follow Through - Always do what you say you will do, especially when it comes to customers.
Objection Handling - Listen, clarify, respond (with empathy), propose (a solution), confirm (if this satisfies the issue), agree (to next steps).	Expectation Management - Responsible for setting and managing appropriate expectations with customers in all situations.	Cross-Functional Liaison - Manage, support and execute cross-functional orchestration for customer management. Partner with internal stakeholder to deliver for our partners.	Promote Customer Advocacy - Identify satisfied and successful customers and help them understand the advocacy options available and map them to programs and activities that resonate with them.	Problem Solver - Always come up with a solution or recommendation; don't escalate issues, propose thoughtful paths forward.

30 DAY ONBOARDING PLAN

	WEEK 1	WEEK 2	WEEK 3	WEEK 4	
PEOPLE	Meet and Greet with the core team - Manager and Peers.	Meet with cross-functional stakeholders.	Understand how the functions work together to support customers.	Active engagement in regular team and cross-functional meetings.	
PROCESS	Day in the life of a CSM; what's expected of a CSM and responsibilities.	Solid understanding of the customer lifecycle and the role of the CSM.	Understanding onboarding, escalation, renewal, training etc.	Clarity around all internal processes that support the CSM function.	
PRODUCT	Product demo and overview; understanding of core use cases.	Deep dive trainings on the product. Watch recordings and KB review.	Green marketing is a practice whereby companies seek to go.	Product competence; know how to onboard and train on platform.	
CUSTOMERS	Customer profiles; persona overview; logos and ICP details.	Review customer details in your CRM or customer management platform.	Shadow customer calls with existing CSMs, OBD Managers, Support etc.	Introduction to customers you will be responsible for.	

EFFECTIVE CSM MANAGEMENT

REGULAR 1:1 MEETINGS

Recurring 1:1 meeting with your new hire. You may need additional meetings week 1.

CLEAR KPIS

Establish how your new hire will be measured the first 30-days of employment.

ONBOARDING/ TRAINING

Support your CSM with everything they will need to know and where to get that information.

COACHING & FEEDBACK

Provide coaching early in the process. Celebrate a job well done & coach when necessary.

CSM ONBOARDING MISTAKES TO AVOID

1.

DON'T JUSTIFY THE "SINK OR SWIM" APPROACH BECAUSE YOU ARE EARLY STAGE.

2.

DON'T SPEED THE PROCESS. GIVING YOUR NEW CSM CUSTOMERS AFTER WEEK ONE WILL SET EVERYONE UP TO FAIL.

3.

DON'T ASSUME THAT AFTER 30 DAYS THEY KNOW EVERYTHING THEY NEED TO KNOW. KEEP THE PROCESS GOING.

4.

DON'T FORGET TO CELEBRATE THEIR PROGRESS. KEEP THEM MOTIVATED AND RECOGNIZE THIS IS HARD.

5.

DON'T FORGET THAT EVERYONE IS RESPONSIBLE FOR THE SUCCESS OF A NEW HIRE.

THANK YOU