3 STEPS TO PUT YOUR CUSTOMER FIRST

this year

Today's SaaS companies have come to expect frequent change and constant innovation—it's in their DNA to adjust with the market and demands. And with these recent changes, a laser focus on recurring revenue and reducing churn has emerged in a big and bold way and, as such, many companies are fast and furiously introducing "customer success" functions. This focus on customer success is evolving every single day since the function was introduced just a few short years ago, and is being adopted by more and more organizations all the time. These companies know that their customers are the sole reason they exist, the sole reason they innovate, and the sole reason they will keep growing in the future.

Serving the customer is front and center for many companies right now—especially since the customers are more savvy and expect more from their partners. Your customer likely manages many different vendor relationships and, whether you believe it or not, they're evaluating how well they're treated and how well you listen to what they have to say compared to their other providers.

Because of this drastic change the industry is facing—and yes, it's a good and needed change—we've been doing our research and listening to some of our own customers and leaders across the customer success industry to hear firsthand how you can take steps to put customers first and set foundations for your future.

While there are many ways to put your customer first, we'll detail 3 fundamental steps that you and your entire customer success organization should put into action now.

Know your customers' goals and their KPIs

Do you actually know your customers? I mean really, truly know them? Understanding your customers inside and out should be your first step in cultivating a long-term, mutually beneficial partnership. And in order to truly know them, you need to spend time asking important questions of each person that you work with—top to bottom in the organization. You need to go "high and wide" as ClientSuccess Founder/CEO Dave Blake says. This means establishing relationships with every person that's associated with your business, whether the decision-making level or the influencer-level.

What kind of questions should you ask—what should you seek to know about each of these individuals? Here's a start:

- What are their teams' goals for your solution within their company?

- What are their personal goals for your solution?

- Did they have a role in choosing your solution and, if so, why did they advocate for or against it?

- How are they personally measured?

- What are their most important KPIs?

- Do they have any alliances or former business relationships with competitors?

- Do you have any connections in common? Could this help you or hurt you?

Spending time to go deep and truly understand your customers is a core foundation of your customer success team—with not one or several, but with all associated contacts in the customer's organization. And once you find out information, preferences, and likes/dislikes (which by the way, is a never ending process), you then must record this intel and truly understand it—the opportunities, the threats, the dynamics, the preferences, and so on.

Knowing the customer by understanding some of the above data points—what's important to them and the metrics they care most about—is the right first step. But actually applying those metrics to how you manage and grow the relationship is just as crucial. It's now your responsibility to tailor the relationship and the solution to what matters most to them and what will make that customer successful.

"Whether our sales are increasing, are flat or declining, we should, without fail, spend quality time with our buyers to understand what's on their minds and respond appropriately."

ALAN HALL, FORBES

According to Alan Hall, a Forbes contributor, "It should be crystal clear to all of us that thoroughly knowing and understanding our customers and delivering what they want is the ultimate key to success. Whether our sales are increasing, are flat or declining, we should, without fail, spend quality time with our buyers to understand what's on their minds and respond appropriately."

Don't just sell—spend time educating

The days of account selling are fading quickly into the distance. People don't want to be sold to anymore and sometimes even "sales titles" on business cards and in email signatures can put prospects and customers off. In a recent Forbes publication, the author, Mike Myatt, comments on this very phenomenon, "Creating or expanding business relationships is not about selling—it's about establishing trust, rapport, and value creation without selling. Call me crazy, but I don't want to talk to someone who wants to manage my account, develop my business, or engineer my sale. I want to communicate with someone who desires to fulfill my needs or solve my problems."

While there is still a function of direct selling on the front end of most businesses—and likely always will need to be—the notion of "selling" may eventually cause businesses to approach sales differently in the future. Mike's quote sounds a lot like why customer success as a function was developed in the first place. Customers want to be educated—they want to learn, they want to be taught

new things, they want to understand what other customers using your solution are doing and how they stack up, they want to save time and money, and they want to look like heroes in their own organizations. Spending time to truly educate your customers will pay off in big ways in the long run—and maybe even in the short run.

"It's not about you, your company, your products or your services. It's about meeting customer needs and adding value. When you start paying more attention to your customer's needs than your revenue needs, you'll find you no longer have a revenue problem to complain about."

MIKE MYATT, FORBES

Later on in his article, Mike bluntly states, "It's not about you, your company, your products or your services. It's about meeting customer needs and adding value. When you start paying more attention to your customer's needs than your revenue needs, you'll find you no longer have a revenue problem to complain about." While that may be a bold statement, at the heart of the quote—there is a whole lot of truth. If your customers feel like you are truly adding value and are meeting their needs in a timely and more-than-professional fashion, then they will gravitate to you and your company—and they will tell all of their friends about their great experience (even if things don't go as planned in some circumstances).

In a recent survey of thought leaders that ClientSuccess conducted across the customer success industry, one individual commented, "A great customer success function can actually make up for flaws in the product. If the product has some weaknesses, you

can engage the customers in some way to get them to come back and keep engaging. A true partnership and consultative engagement will help customers understand your team is in it for the long run, and are not just asking for their renewal."
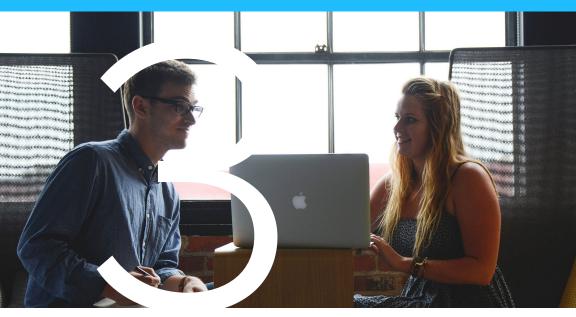
"A true partnership and consultative engagement will help customers understand your team is in it for the long run, and are not just asking for their renewal."

How true that is, right? Think about two very different personal experiences for a moment. The first scenario: when you walk into a clothing store where you know the sales reps are compensated based on commission, do you cringe and respond with "just looking" when he asks how he can help? You probably do have something in particular you're looking for, but you know if you tell this sales person this, then they will do everything they can to sell you an item and you fear they may tell you "that shirt looks amazing on you" no matter what. That's of course not always the case, but a few bad experiences have probably jaded you—so you tune out.

Now imagine a different scenario. You walk into an electronics store and you're looking for the perfect pair of headphones. Rather than refuse help in your search, you tell the associate you are looking for a pair of headphones, to which the salesperson responds by asking you a set of questions in attempt to get to know you and find the perfect pair: "How often will you wear them?" "Are they for working out at the gym or for talking on the phone?" "Do you prefer on-ear, buds, or over-ear?" "Do you fly often?" "Do you have a price range in mind?" These questions are all important when determining the right product and the right education around how to get the most from that particular product. But most importantly, it doesn't

feel like a sales pitch—because it's not. And most likely, you walk out of the store satisfied with your purchase as well as your overall experience. Why? Because the individual spent time truly getting to know you, asked questions to understand your goals for the headphones, and then recommended the best option.

Now, relate that back to the SaaS industry. Giving away education rather than a sales pitch is a breath of fresh air—especially in the SaaS industry where your customer probably expects you to hard sell. By truly knowing them, by working towards their goals and not yours, they will innately begin to trust you, to share more, and to invest in the partnership - which, incidentally, can eventually take the form of referrals and more business.

Be your customer's internal advocate for change

As a customer success professional, you have a huge job. You are responsible for the relationships with the customers who make your business thrive—and keep it ticking. Since you've been building relationships with your customers and have been educating them on how to get the most value and how to help them exceed their goals, they now are opening up to you and sharing successes, opportunities, and concerns with you. They tell you how their experience is across your entire company, whether positive or negative. The fact is, you are not the only person in your organization that interacts with your customers—they also deal with other departments, such as finance and accounting, services, support, and likely a few other functions as well.

As a customer success professional, you should be able to impact change across the organization when needed, putting into action some of the valuable feedback you receive. You've heard from your customer that the contract and legal process is painful? Or the

invoicing process is confusing? The services process is ambiguous in its scope? It takes 3 days to get a service request addressed and even longer to have it resolved? These are all incredible data points to know, yes. But taken a step further, you should then feel empowered to take to your manager, your Chief Customer Officer, or whomever the proper person is at your company (or department, for that matter). Or what about when things go right? Knowing the proper person to tell and to share the kudos is crucial for good morale and good culture across your organization.

What if you could truly change your organization for the better and become a company known to be 100% sold out to its customers? What if your own relationships were so strong both externally and internally that your voice was heard and positive change was the result? Put yourself in your customer's shoes—or even your own shoes for that matter. You are likely the customer of someone else and when you have a suggestion, a complaint, or even a compliment—don't you want to know that some action was taken? That some sort of feedback loop is in place to ensure you know that your suggestion was considered?

If you're an executive in an organization where customer success is a primary focus, it's imperative that you empower your professionals to not only suggest change, but to make those changes a reality if it means a better experience for your customers. According to a recent article by Strategy + Business, "The blunt truth is that most change initiatives are done "to" employees, not implemented "with" them or "by" them. Although executives are pushing behavior change from the top and expecting it to cascade through the formal structure, an informal culture left to instinct and chance will likely dig in its heels."

As a customer success professional, it's not only a suggestion to be your customer's advocate—it's really become a requirement in today's competitive landscape. And often times making changes to better the customer experience will, at the same time, improve the internal employee experience as well.

Conclusion

We detailed 3 critical components that you and your organization can use to start putting your customers first this year, but this is certainly not the end all be all. There are many ways in which you and your company can put your customers first everyday and truly make them look like heroes in their organizations, which should be the ultimate goal. Have a suggestion for what else companies should implement into their customer success strategies? How have you made a customer look like a hero? Share it here: #success15

How have you made a customer look like a hero?

Join the conversation at #success15

This eBook was brought to you by ClientSuccess,
The Customer Success Management Platform™.

To learn more about ClientSuccess or request a free demo,
visit clientsuccess.com or give us a call at 801.441.0805.

client success™