

# client success

REDUCE CHURN. INCREASE EXPANSION.  
MAXIMIZE REVENUE.

## TOP 16 MISTAKES TO AVOID WHEN BUILDING A CUSTOMER SUCCESS ORGANIZATION

Dave Blake, Founder/CEO  
Kristi Faltorusso, VP of Customer Success



# TOP MISTAKES TO AVOID

01

Failure to Collaborate with Cross-Functional Teams

02

Not Leveraging Data or Focusing on the Wrong Metrics

03

Absence of a plan and Customer Journey

04

Lack of Focus and Striving for Perfection

05

Not Celebrating the Wins

06

Assuming Customer Success is a One-Size-Fits-All Model

07

Failure to Train and Enable your Team

08

Absence of Transparency

# TOP MISTAKES TO AVOID PART II

09

Not Including your team in process creation

13

Failure to Develop a Voice of Customer Program

10

Poor Compensation Models that Do Not Incentivize the Right Behaviors

14

Not Focusing on Diversity of Thought When Building Your Team

11

Not Innovating Your CS Program Overtime

15

Failure to Set Proper Expectations with your Team

12

Saying Yes to Everything

16

Thinking You Must “Know It All”

# HOW TO AVOID MAKING THESE MISTAKES

# Failure to Collaborate with Cross-Functional Teams

1

Breakdown silos and move to a customer centric collaboration model

2

Align on Goals and KPIs so that all teams are marching in the same direction

3

Find mutually beneficial ways to move forward on strategies and tactics

# Not Leveraging Data or Focusing on the Wrong Metrics

1

Understand where all of the data in your company lives

2

Make decisions based on what the data is telling you - not what you “believe” to be true

3

Determine what your core metrics are before you start designing your CS Program

# Absence of a plan and Customer Journey

1

Determine where you are going and then map out a plan to get there

2

Spend the time to design a formal customer journey from the customer's perspective - "Outside - In"

3

Socialize and share your plan and your journey with the broader organization to drive alignment

# Lack of Focus and Striving for Perfection

1

Determine what your desired end state is and then align on what is acceptable to get started

2

Iterate early and often - Evolution of process will serve you and the team well

3

Set priorities and only do work that supports the achievement of those priorities



# Not Celebrating the Wins

1

Talk about what's working in all relevant meetings

2

Take time to celebrate the successes of your business and those of your customers

3

Be loud and proud - You are doing great things and everyone should know

# Assuming Customer Success is a One-Size-Fits-All Model

1

Take the time to do the research and understand what makes your company and customers unique

2

Use best practices as a baseline to start, but modify to properly support your business

3

Take chances and try something new - Don't just continue to play it safe

# Failure to Train and Enable your Team

1

Document all processes so that the team can reference this in the future.

2

Make training a part of your ongoing team cadence. Pick a topic each week and go deep.

3

Empower your team to support your efforts. Giving them an opportunity to lean in will develop their skills.

# Absence of Transparency

1

Communicate early and often. Ambiguity breeds uncertainty and doubt.

2

Support the flow of communication throughout your organization. Don't let the information get stuck.

3

Create a safe place for feedback. Communication and transparency should work both ways.

# Not Including your team in process creation

1

Establish a review team of your employees to give feedback on new processes.

2

Seek feedback on how things are working; act quickly to evolve processes as needed.

3

Ensure your team feels like change is happening with them, not to them. Discuss this in 1:1 meetings.

# Poor Compensation Models that Do Not Incentivize the Right Behaviors

1

Set bonus or variable compensation around the core metrics they influence.

2

Set reasonable targets that are a challenge but not impossible to achieve.

3

Ensure transparency and visibility of all metrics - No one should wonder how they are doing.

# Not Innovating Your CS Program Overtime

1

Set a cadence to review your process and program; make sure to stick to that timeline.

2

Allow your team to provide feedback and innovate as change is needed.

3

Take risks and try new things. No one made huge strides playing it safe.

# Saying Yes to Everything

1

Use your goals to set your priorities; If it's not your priority or will impact your ability to achieve it, say no.

2

Make sure to communicate to folks what will happen if you take this on. Discuss the trade offs.

3

Socialize your priorities with key stakeholders in your organization; they are less likely to ask you to do more.



# Failure to Develop a Voice of Customer Program

1

Ensure a way to capture customer feedback and share it with others in the business.

2

Always have a way to close the loop. No customer should feel unheard.

3

Start small and then scale your efforts. If you don't have the ability to manage it, no one will benefit.

# Not Focusing on Diversity of Thought When Building Your Team

1

Make diversity a top priority; it will not happen accidentally.

2

Focus on diversity of thought; you don't always have to "see" diversity.

3

It only takes 1 hire to make a difference. Make each hire count.

# Failure to Set Proper Expectations with your Team

1

Establish clear expectations with everyone on your team and make sure they are documented.

2

Ensure there is a way to measure their performance around these expectations. Provide ongoing feedback.

3

Provide coaching where needed. Don't tell someone they are not performing without a plan to help them.

# Thinking You Must “Know It All”

1

Leading is not about knowing everything; hire folks who will fill your gaps - Don't be threatened.

2

Admit when you don't know something and allow the folks on your team to lean in with advice.

3

Check your ego at the door. No place for egos in a professional and collaborative work environment.

THANK YOU