CUSTOMER SUCCESS

as a culture

MARKETING LEADERS EDITION

Dear Reader,

At ClientSuccess, we thrive on making your customers successful. We've done research in the past on what the leading tech companies predict for customer success in 2015, and in this eBook we've complied ideas and examples from leading marketing teams and how they influence customer success. This is the first set of research in a series around customer success as a not just a department, but a culture. We are excited to share with you how these marketing professional interact with their customer success teams and how much focus they place on communicating and involving their customers.

We learned the different initiatives these professionals and their teams have centered around customer success, how important customers are to their department and company's goals, and how many resources they have dedicated to focusing on their customers.

"The key is to set realistic customer expectations, and then not to just meet them, but to exceed them—preferably in unexpected and helpful ways." —Richard Branson

We'd like to challenge you to look at your organization and team, and see what focus and initiatives you have centered on customer success. We hope to encourage companies to prioritize initiatives centered around customers, making them lifelong advocates of their brand. Challenge yourself: How will you exceed your customers' expectations?

All the best,

Dave Blake
Founder/CEO, ClientSuccess
dave@clientsuccess.com

> ## If you are not a customer obsessed company, you need to reevaluate your goals.

Gina Mueller

Director of Marketing

insightpool

Gina Mueller is the Director of Marketing at Insightpool, where she leads a team of marketers focused on building a world-class brand and fueling growth for the company's sales teams.
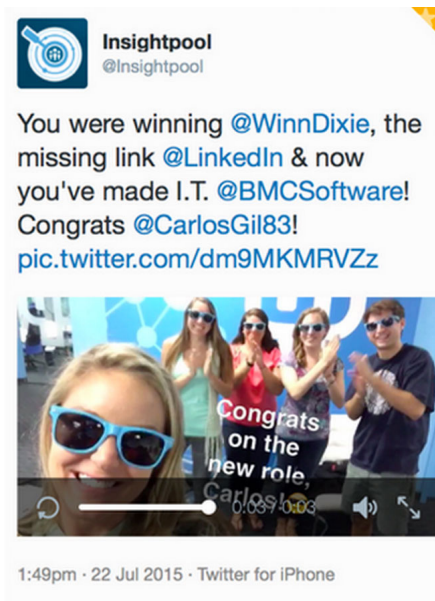
While mapping out how to reach her team's goals, Gina and In-sightpool's leadership realized there were disparities between their sales and customer success teams when it came to aligning their goals towards customer success. **Gina states, "being a customer obsessed company is not easy—we work for it everyday by improving customer experiences, creating new processes, innovating, and staying flexible."**

Gina and her team knew they needed to make sure that the organization as a whole had the same focus towards the company's ultimate goal: Find customers they know will be successful with their social solutions, securing long lasting business.

Their solution was to combine the sales and customer success team into a single, large, "revenue" team. Since aligning the customer success, sales and marketing teams, Insightpool has noticed a significant increase in upsells. Gina credits the teamwork and collaboration for the increase in sales, "we must [as one team] educate and guide our customers in new and innovative ways to achieve desired results."

With their teams now aligned, Insightpool has implemented initiatives that keep their customers top of mind on a consistent, ongoing basis. **With each marketing initiative, Gina has her team look at opportunities where their customers can be involved.** They provide opportunities for their customers to speak at events, identifying that their customers enjoy being showcased as thought leaders. Gina's team also highlights their customers through digital marketing campaigns, like blog posts and online features.

All of these initiatives have the end goal in mind to let Insightpool's customers know that they are always top of mind. If there's a milestone for a customer, or even something as simple as a birthday, Gina's team has a process in place to recognize the event: social outlets, digital marketing campaigns, events, and more. They also

Insightpool
@Insightpool

You were winning @WinnDixie, the missing link @LinkedIn & now you've made I.T. @BMCSoftware! Congrats @CarlosGil83! pic.twitter.com/dm9MKMRVZz

1:49pm · 22 Jul 2015 · Twitter for iPhone

don't stop with "welcoming" new clients, they gift swag and other material through consistent, focused, marketing campaigns.

With new customers, Gina and her marketing team make sure to sit down with each one so they understand all of the customer's goals and initiatives. They also have a welcome nurture track that includes introductions to the Insight-pool team and online resources. Gina states, "this welcomes them to the family in their first five weeks."

"We try to build camaraderie by welcoming our customers to the 'swim team' from day one, 'play in the pool at Insightpool!' This ties with our super casual, laid back, and fun culture. Devon [Wijesinghe], our CEO, even introduces himself as 'captain of the swim team' in the initial welcome email. Also included in the welcome series is our Customer Success Toolkit site. This is a one-stop shop for customers to create their first social campaigns and research for new marketing ideas."

Customers aren't just a quarterly number to Insightpool, they are a part of the Insightpool family. What's unique about Insightpool's culture is that this isn't just an idea or framework, it's an actionable philosophy carried through every facet of their business. Gina shares:

All of these initiatives are, of course, to build lasting customers, but Insightpool takes that a step further and **aims to make all of their customers advocates of their product.** Currently, Gina's team is focusing efforts on an influencer program powered by Influitive.

How do all of these creative ideas come to life? Gina realized that the new revenue team's bi-weekly meetings weren't producing at the pace they needed, so they created a group on the communication tool Slack. The customer success team uses this tool to share all customer successes—no matter how big or small—so the entire marketing part of the revenue team has a first person view into Insightpool's customers on a consistent basis.

This collaboration isn't one-sided, either. The customer success team learns just as much from marketing as Gina's team does from them. Gina states that they've recently become a "customer" of their customer success team. Because Insightpool sells to marketers, Gina states, "it just made sense to be a guinea pig for the team. This way, we can give honest feedback and challenge the product and reporting features. Ever since we switched over to using our own platform, our results have skyrocketed. Our teams are excited to continue to collaborate and work together!"

When asked how often the marketing team interacts with customers, Gina shared their communication cadence, as well as the objective of these conversations:

"The marketing team doesn't interact with our customers at the same depth as our customer success team, who talks to them every week through email and phone every other week, but we do try to talk to at least one customer every day through social networks. Plus, we send a monthly email newsletter and other emails communicating new features or promoting exciting events, like webinars, that are coming up. I try to attend a handful of client calls and meetings each quarter in order to hear [directly] from [customers]. It's always good to hear how they talk about Insightpool, what's important to them, and what changes they'd like to see. Your customers want to succeed using your software— so put in the time to understand their goals."

Gina estimates that about 30% of marketing's time is dedicated to customers success. She does state, though, that while not all of their initiatives are involving customers, "if you are not a customer focused company, you need to reevaluate your goals."

Keeping this philosophy in mind, Gina plans to create a role that is a hybrid of an account manager and marketing consultant, ensuring they have a single dedicated role to customer success, "As a marketer selling solutions to marketers, I have to constantly remind myself that every marketer has unique goals, and in order to help a client succeed I must understand their goals (and their bosses goals!)"

> **Marketing isn't just about selling; it's about serving customers.**

Jeffrey K. Rohrs

Chief Marketing Officer

yext

As CMO of Yext, a leading digital presence management software company, Jeff spearheads global brand strategy, product marketing, field marketing, demand generation, and customer engagement initiatives.

In addition to traditional marketing goals: brand initiatives, product and field marketing, demand generation, and the like, Jeff uses market research and ongoing education to exceed his team's goals and maximize Yext's customers' success with their product.

"Our Marketing team seeks to contribute to customer success through ongoing product, industry, and technology education. [Because] our products are all about helping brands harness the power of location, we spend a lot of time looking at how mobile devices are shaping consumer behavior. This provides us with insights that not only fuel product development but also help us advise our clients on how to tap the 'home field advantage' of their brick and mortar locations."

Only a month into the job, Jeff is already identifying what programs, initiatives, and strategies Yext can implement to further drive customer success. "We are looking at ways to become an even better source of mobile and local marketing thought leadership," Jeff says. "We're also collaborating with our customer service and education teams to identify points of collaboration that will improve customer onboarding, peer-to-peer networking, and customer satisfaction. **A key part of that initiative is listening to our clients to best understand the efforts we should prioritize in order to ensure their success.**

The first step in driving these initiatives, Jeff states, is implementing a cadence of meetings with Yext's customer success team, "While we have standing meetings to learn what our customer success team is hearing from clients, we're really in constant collaboration—looking for opportunities to amplify customer achievements and address any service issues immediately."

A true advocate for customer success, Jeff puts Yext's clients at the center of marketing's success, **"I'm a firm believer that satisfied customers are your best form of marketing, so we expect to in-**

vest more in the coming year to surface their stories and create a community where our customers can learn from each other." These investments will be programs centered around a "customer first" philosophy and will also aim to help drive product innovation. Per Jeff, "the two [marketing and product] are not mutually exclusive, and it's going to be my team's distinct honor to build those programs from the ground up."

As Jeff strategizes what he and his team should prioritize, he expresses that his focus on customer interaction is essential. "I'm trying to have weekly interactions with at least one of our customers," says Jeff. "As CMO, it's imperative to push for such direct conversations, as much can get lost in translation."

Even in his short time at Yext, Jeff has already seen success from regular customer interactions with marketing, as well as product innovation. "My objective in every case is to better understand how they view our products, relationship, and brand—as well as how we're serving their needs. Already in my short tenure, such conversations have helped us simplify our product lines and naming conventions as well as set our sights on new products to address customer needs in the mobile space. I look forward to getting our team [further] built out so that I can engage with our customers even more in the coming months."

When asked how much of his job contributes to customer success, retention, and growth, Jeff responded without hesitation, "100!%"

"Marketing isn't just about selling; it's about serving customers. I often say that the only formula you need in marketing is, "Relationships > Single Sales." Our job is to build relationships over time and to become a trusted partner to our customers. In doing that, we become more than a vendor, we become a trusted partner. And we are valued not only for the products we sell today but also the innovations we will bring to market in the future."

> **Customers are the heart of our company.**
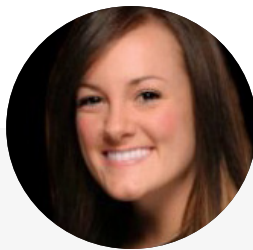
Nicole DelMastro

Director of Marketing

CloudOne

Nicole DelMastro is the Director of Marketing for CloudOne. In Nicole's current role, she leads all aspects of CloudOne marketing, public relations, culture development, and philanthropic efforts.

When asked how her team contributes to the company's overall efforts to drive success, retention, and growth within their existing customer base, Nicole didn't hesitate to emphasize the importance of their customers: "Customers are the heart of our company. As marketers, we are constantly focused on our customer success. We have monthly customer health check reviews so each team member is aware of our customers' metrics. Then, we brainstorm new initiatives to drive customer growth. **Our marketing team's goal is to create loyal customer advocates."**

These efforts don't stop at awareness of their customers. Nicole's team has implemented ongoing campaigns and programs to keep their focus scalable as their business grows by collaborating with CloudOne's customer success team. The CloudOne customer success managers have quarterly business reviews with each of their customers to obtain valuable account information that can be used for ongoing engagement.

After these reviews Nicole states that her team emails customer success surveys that provide their customers an additional resource to share their feedback. "Depending on their feedback," Nicole says, "we set-up a series of drip campaigns to provide additional insight, education, and account information. **We have several new initiatives rolling out this year, including: an on-boarding welcome campaign, community forums, virtual roundtables, a customer newsletter, a Customer Advisory Board, customer loyalty and referral programs, and lots more!"**

Including the consistent business reviews, Nicole's team works side-by-side with customer success managers to ensure the needs of their customers are being met from a marketing perspective. They currently have weekly and monthly "health checks" to continue the marketing team's focus on customers and also to discover new opportunities for product and service innovations.

"…it doesn't matter what product or service we sell or what individual role we have in the company. The only thing that makes us relevant is the experience we're providing the customer each and every day. Our main job is making customers look like heroes. Our team goes [above] and beyond to ensure customers are successful. 100% of our job is focused on customer success."

Further proving Nicole's team is customer-centric, she shares they recently dedicated a full-time resource to focus passion and attention to developing their Customer Success Program. "This will allow us [CloudOne] to elevate our already amazing customer experience to the next level."

When asked how often Nicole interacts with clients, she responded with a smile, '99.99 of the time!'

Nicole Ross

Owner

CREATIVE
QUARTERBACK

Creative Quarterback is a digital marketing agency that offers organizations without sufficient internal marketing resources access to 'big boy' creative talent and project management. In addition to drafting and managing teams of freelance talent, Creative Quarterback acts as the single point-of-contact for branding, design, copy, web, video, photography, printing, and promotional products.

Creative Quarterback is a digital marketing agency that offers organizations without sufficient internal marketing resources access to 'big boy' creative talent and project management. In addition to drafting and managing teams of freelance talent, Creative Quarterback acts as the single point-of-contact for branding, design, copy, web, video, photography, printing, and promotional products.

As owner of the agency, Nicole is tasked with setting her business vision and mission, and the core of that is at her customers. When thinking about customer success, Nicole states that she thinks of the iceburg metaphor: "At least 90% of the work that goes into making customers successful and happy takes place below the surface. Clients don't (and shouldn't) see all the back and forth required to coordinate freelancers, address questions, manage files, troubleshoot issues, cycle through revisions, etc."

Because all work Nicole and her employees do are behind-the-scenes, she realized it was important to give her clients some insight into the efforts behind the work they were doing. Currently, her and her team are working on a series of client success snapshots and graphics that illustrate significant pieces of a client's project(s). She states that this will include, "data around the number of hours worked, tasks and files managed, freelancers coordinated, and estimated time and money saved by using the Creative Quarterback model over traditional creative agencies."

Nicole stresses that it's important to share these insights with clients to show them the amount of work that goes into the "shiny deliverable" they see at the end of the day. **All of this ensures her clients see the value her and her team provide and done in a positive, visual way contributes to repeat business and referrals, as well as nurture her relationships with her clients.** Nicole also uses these client snapshots as marketing opportunities, sharing them through various social channels.

Even though Nicole's digital marketing agency is still in the startup stage, she recognizes how important it is to keep client success efforts on her radar. These efforts are evolving, but Nicole shares, "the next 6-9 months are focused on implementing more backend business systems to improve the client experience process. Our team is currently using Basecamp project management software to communicate both internally and externally. The tool has worked positively so far, as it's permission based. The client doesn't need to see all of the nitty-gritty details my team is working on. **Having all of the moving pieces of a client's project in one solution makes it all the better experience for the customer."**

When asked how her teams collaborate towards customer success, Nicole stressed her initial challenges to scale how quickly her business was growing:

"Creative Quarterback has had the good fortune of growing very quickly during our first six months in business—100% by referrals. But, with that growth came its own set of customer service challenges. Being the sole point of contact for my expanding client base didn't scale. I didn't want to become a 'bottleneck leader,' and I quickly realized that it wasn't enough to scale my creative team. I needed additional folks who would be completely focused on client communications, responding to questions, generating estimates, and keeping projects on time and on budget. Within the first three months, I brought on two additional "Quarterbacks" (project managers) and began assigning two of us to every client—big or small."

Nicole also recognizes that the success of her customers does not solely rely on programs and initiatives, it relies on mindset of her employees:

"It may sound counter intuitive, but one thing that helps us focus on our clients is first helping our team members be at their best. Stressed, frazzled, sleep-deprived people don't typically provide A+ client support. By supporting and caring our freelance team, being a listening ear, inviting questions/concerns, showing appreciation, and helping each other when folks have too much on their plates keeps our team members in the right frame of mind to treat our clients well. "

By the same token, it's my job to ensure the clients we work with are going to treat my team well in return and be good business partners. Culture is a two-way street, and we've parted ways with clients who didn't 'fit' our values or approach."

When asked how often Nicole interacts with clients, she responded with a smile, "99.99% of the time!" Depending on the project, Nicole may interact with her clients multiple times a day, or randomly based on the type of request: "Because of the nature of our business, and the fact that we operate without a physical office presence, the vast majority of client interactions take place via phone, email, and even text—not face-to-face. Our job as Quarterbacks is to learn (as quickly as possible) the channel, timing, and style each client prefers, then tailor our interactions accordingly. No matter the frequency, our objective is to provide proactive updates, raise red flags and propose solutions, and—most importantly—be human beings! We ask about our clients' kids, vacations, pets, etc. Connecting with clients on a personal level is part of the job—the best part!"

> **If our customers aren't successful, then our marketing team isn't successful. They're the reason why our team exists.**

Phil Sharp

VP of Marketing

User Testing

UserTesting gives marketers, product managers and UX designers on-demand access to people in their target audience, who deliver audio, video and written feedback on websites or apps in less than one hour. Phil's role is to ensure marketing strategy, communications, online campaigns, and web optimization. With a background in marketing management and SEO, he leads the marketing team in helping companies discover the importance of user experience and usability testing.

If there was ever any doubt that UserTesting doesn't embody a customer-focused culture, take a look at their marketing organization. Phil, VP of Marketing for UserTesting, prioritizes a customer-centric environment so much that two of his marketing team's principles are the exact same thing.

"My main contribution is in building a culture within our marketing team where the customer comes first. In fact, our marketing team has seven principles that guide us and two of them are 'The customer always comes first.' Yup, two of our seven principles are exactly the same."

Taking this initiative to action, Phil has developed several marketing programs that feature their customers' success. "We have a weekly webinar series where we have great guest speakers who help our clients learn and grow. These webinars aren't to pitch UserTesting—in fact, we rarely even talk about our product, **but we want to keep our customers learning and happy**, and these webinars have been a great way to do that."

Realizing that the marketing team needed to be aligned with all facets of the business, most particularly the client success team, Phil created a role on his team to be solely focused on customer retention, engagement, and happiness. Per Phil, this resource, "works very closely with our client success team on a daily basis as they share the exact same goals. Thanks to how closely she works with them, she serves as the voice of client success on our marketing team."

Not only does this resource provide a view to the marketing team through customers' eyes, but Phil states the company as a whole prioritizes knowing and understanding their customers' experiences:

"We watch a ridiculous number of user tests. Every day, many people in the company are watching videos of our customers using our product and it's a very enlightening and humbling experience. By seeing people actually use our product, we build up a whole lot of empathy."

Even though UserTesting embodies a customer-centric culture, they recognize that they can always improve on customer engagement. **"We interact with customers weekly," says Phil, "but we should probably interact with them even more often.** One of the main ways that we interact with customers is through running user tests. Before our team launches a new campaign we user test it. This lets us get videos of real people using our marketing collateral so we can see and hear where they get stuck or confused. Then, we can fix it before we launch to everyone."

Customers are the reason your company is growing today and will continue to grow tomorrow! The moment the focus changes is the moment customers start to churn.

Teresa Becker

VP Marketing

Teresa currently serves as VP of Marketing at High Alpha, a venture studio that conceives, launches, and scales enterprise technology companies. In addition to High Alpha, Teresa is the owner of Teresa K. Becker Consulting, an independent marketing consulting company helping B2B technology companies across marketing specialties including: demand generation, messaging/ positioning, and global and product expansion.

As a tenured professional in SaaS marketing, Teresa is an expert in identifying trends in marketing: goals, focuses, and investments. When it comes to marketing's overall efforts in driving customer success and sales, Teresa has found that almost all of marketing's attention is placed on driving new business growth, new prospects, new customer, new sign-ups, etc.

"Little energy is placed on driving customer satisfaction through marketing activities, but educating customers can pay off in big ways," she says.

"When I'm consulting my clients, I often recommend doing field marketing events and having a customer share his or her own true story. Doing educational events for customers provides VIP privileges for your clients to get immediate access to marketing materials such as event registrations, new research, and other valuable tools. Making sure your customers have the latest education about your product and services, as well as industry marketing material, will instantly help ensure that your customers know you're in it for them."

When Teresa is consulting her clients on what marketing programs and initiatives they should be implementing or placing in their road-map, she places a huge focus on customer involvement. "Field marketing events are incredibly helpful in not only driving sales, but

involving your customers." Teresa also suggests referral programs and advisory boards for customers, "these are great programs to implement for scalable inclusion and recognition of customers. **Referral programs are great ways to reward your customers, and advisory boards are a wonderful opportunity to get real, honest input from your customers."**

Teresa also mentions that including customers with webinars, case studies, and other digital marketing channels are great ways to involve customers with your digital marketing campaigns. "As a marketing consultant, I don't always interface directly with customer success teams at the companies I work with, but I try to always make a point to include them on communications and make sure they have input on programs, topics, and case studies," states Teresa. "I often times interview the customers myself for case studies—hearing their stories first hand and then articulating their story helps me understand what pain points they faced, how they overcame challenges, and how they're growing. **Understanding the customer point of view shapes everything that marketing creates (or should!)"**

Teresa will interact with a client on a biweekly schedule due to her unique situation as a marketing consultant, but says, "my objective is to always learn what's working in the field, how things can be better, what messages are resonating, and how customers are succeeding."

> **Customers are at the center of everything that you do. It's an expected part of everyone's role.**

Judd Marcello

VP of Marketing

SMARTLING

Judd serves as the VP of Marketing for Smartling, a cloud-based translation management platform. A tenured marketer, Judd came to Smartling from Salesforce.com Marketing Cloud through its acquisition of ExactTarget, where he was senior director marketing, EMEA. Prior to Salesforce, he held demand generation marketing and brand marketing roles at eBay Enterprise Marketing Solutions, Canon Australia, Black & Decker, and Nestle.

As VP of Marketing, Judd focuses on driving business through brand awareness, digital campaign execution, and initiatives to continue ongoing success with customers. When mapping out these initiatives, Judd and his team look at customer engagement with their platform, retention, and levels of support provided. Combined with these efforts, Smartling also has a customer success team.

"We collaborate and communicate frequently [with the customer success team]," says Judd. "It's a natural part of the way we do business. We make it a point to stay in tune with what one another is doing." Judd stresses the importance of interacting directly with customers as well on a regular cadence, "it's usually discussing specific initiatives, like a case study or any marketing-related questions, or even strategy."

When asked if he was accountable for growing any existing business, Judd shared that retention is a big focus from a marketing perspective, and that it goes hand-in-hand with how they measure business:

"Measuring the business tells you a number of things, but with customers it tells you how healthy the relationship is, and it shows us where we may need to do a better job of [fostering] these relationships. Sometimes that's around enablement— education on the product and how other customers are using it. Other times, it's bringing to light that we need to improve our brand outreach. For example, how we communicate through support and how our brand is represented to customers."

Judd also shared how Smartling embeds this customer-focused culture throughout the whole company. "One of the things we are focusing on now is creating a customer community. In building that out, we're looking at something we hear quite often: **customers want to hear from other customers and how they're using the platform.** They want to see where other customers' successes are and how they are overcoming barriers. We are trying to accommodate that by creating a place where all of that can happen. As a marketing team, we want to be able to directly or indirectly listen in on that community. That will be a channel and an opportunity for us to be able to speak with our customers directly from a marketing standpoint."

Because of the large focus on customer interaction, we asked Judd if he planned on dedicating a single resource on the marketing team to customer success. His response was twofold, saying, "to have that mentality as a team is really important, because customers are at the center of everything that you do. It's an expected part of everyone's role." On the other end, Judd states that as his team expands, he will look to see where a dedicated role to customer success makes sense and aligns with Smartling's goals and mission. "It's important to have a dedicated employee to that type of role, because any time you have a dedicated employee there's that much more of a focus."

> ## We publicly share the health status of each customer and rally the entire company to ensure customer success.

Kevin Young

VP of Marketing

monetate®

Kevin leads the Monetate marketing team and all marketing functions including product marketing, demand generation, content marketing, events, corporate communications & analyst relations. He has more than 20 years experience developing business and marketing strategies for high growth SaaS companies.

A large part of Kevin's strategy for Monetate's marketing lies within efforts centered around customer success. Kevin and his team have several marketing initiatives that contribute to customer success, retention, and growth. Kevin provided a list that outlines these initiatives at a high level:

- **Messaging and positioning:** We have used customer input to craft our messaging and positioning and have created thought leadership to help guide our customers as they look to create more value from their investment in Monetate.

- **Case studies and success stories:** We capture stories and best practices to help clients learn and grow.

- **Economic impact studies:** We have detailed Forrester studies to measure the value Monetate has delivered and create a value framework that clients can use to demonstrate the ROI of Monetate.

- **Monetate Summit:** We hold a large client event every year to celebrate success and share our future vision. We had over 500 attendees this past May!

- **Strategic Customer Advisory Board:** Our marketing team hosts an advisory board that provides feedback on messaging, positioning, and product strategy."

Another unique initiative of Monetate's marketing team is their "Path to Personalization." "Marketing has crafted a personalization maturity model, the Path to Personalization" says Kevin. "This thought leadership content has been used in our quarterly business review meetings to craft a plan to expand utilization of Monetate and drive more value for our customers."

Kevin also interacts directly with customers, serving as an executive sponsor to many. "We meet regularly to share best practices and capture case studies." Kevin also shares the collaboration between marketing and the client success teams, "Marketing builds out the presentations used by the client success teams for their quarterly business reviews. We also publish a monthly customer newsletter."

Ensuring this mindset threads throughout the entire company, Kevin shares that Monetate has made customer success one of their core values. **"We publicly share the health status of each customer and rally the entire company to ensure customer success."**

Kevin also interacts with customers on a weekly basis. "The purpose of these meetings are centered around several things," Kevin shares. "These topics are strategic feedback from our Customer Advisory Board, executive interaction with my sponsored customers, case study interviews, and social events."

We've learned how these marketing leaders embed customer success into their company culture and team—now you tell us:

How do your customer success and marketing teams collaborate?

Tweet us at @ClientSuccess!

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**™