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CUSTOMER SUCCESS FUNDAMENTALS

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WHAT DOES CUSTOMER SUCCESS MEAN?

- CS can include implementation, renewals + upsells, NPS, harvesting client advocates and more
- Start by reflecting on “what you need”, then identify what you’re already doing well + where you tend to drop balls with your customers

START WITH THE CUSTOMER JOURNEY + “WHO DOES WHAT”

- A customer journey can be as simple as a list of “what needs to happen for a new customer to get value out of our product” and who does what to make it happen.
- Nailing the handoffs amongst your team is key – focus your attention on the points when someone new “takes over” for a customer

FOCUS ON THE KEY “MOMENTS OF TRUTH”

- A good Customer Success function often hinges on 2 or 3 “moments of truth” - they key points in the customer journey where balls get dropped.
- Identifying your moments of truth – and then training your team to “do this instead of that” when they come up – can be all you need to make huge progress with your CS team

Examples of Jobs-To-Be-Done within Customer Success

It's a good idea to start by acknowledging all the activities that sit w/in CS

CUSTOMER SUCCESS FUNCTIONS

CS Operations

- Sales survey
- Renewal forecast
- Analytics
- NPS & CSAT
- "Tech-touch"

Customer Enablement

- Adoption
- Customer Training
- Rapid Launch
- Onboarding CSAT
- Knowledge base

Account Management

- Upsell / X-sell
- Renewal
- Contracts
- Advocacy
- Reference

Professional Services

- Project management
- Solution architecture
- Product consulting

Customer Care

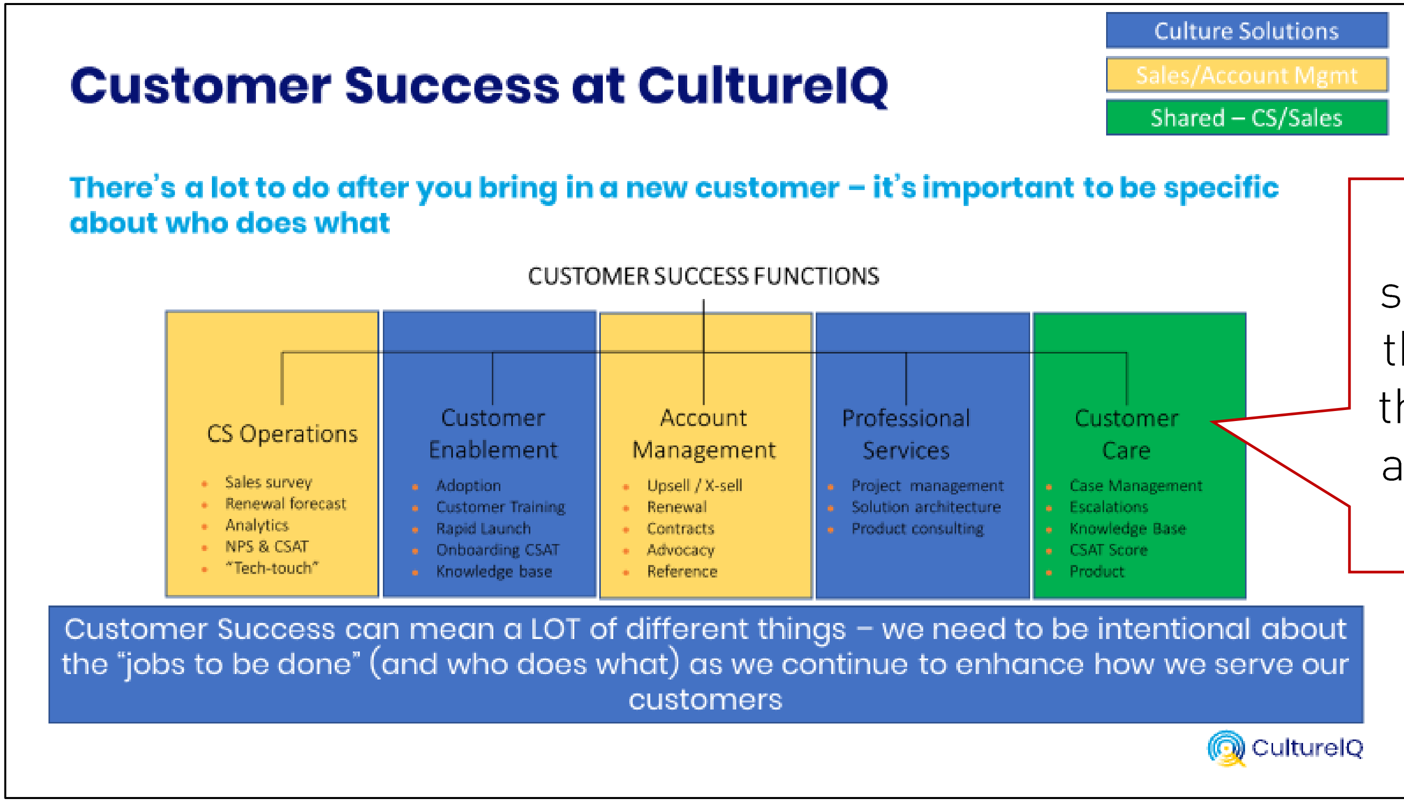
- Case Management
- Escalations
- Knowledge Base
- CSAT Score
- Product

Start by reflecting on "what CS needs to do" and "what we already have" – see following page for an example from the portfolio

Examples of Jobs-To-Be-Done within Customer Success

As an initial step, mapping "who does what" can start to create clarity on gaps and handoffs

Portfolio Example: CultureIQ



The CIQ team started by mapping the CS functions to their various teams and clarifying "who would do what"

Many teams may spread this work across Sales, Customer Success, Account Management, and Product/Implementation teams… starting with a rough picture of "who does what" can help you ID important handoff points later on

What does this look like "at its worst" for your team?

Building a strong CS function starts by acknowledging – and preventing – dropped balls

WHICH OF THESE COMMON "DROPPED BALLS" HAPPENS MOST OFTEN WITH YOUR TEAM?

- ❑ NO CLEAR **CUSTOMER JOURNEY**
  - ❑ *What are the key steps in the first few months of the relationship that help customers realize value quickly?*
  - ❑ *What are the risks along the way? How do things tend to go sideways?*
- ❑ UNCLEAR **OWNERSHIP + HANDOFFS** DURING IMPLEMENTATION
  - ❑ *When and how does the handoff between sales team + CS/Account Management/Support take place? How are responsibilities communicated to the customer?*
  - ❑ *How is the context gathered in the sales process shared with the rest of the team?*
- ❑ REACTIVE OR INCONSISTENT **RENEWAL + UPSELL MOTION**
  - ❑ *Who is responsible for checking in w/ customer and beginning the renewal conversation? When does this happen?*
  - ❑ *How can we gauge probability of auto-renew vs. more complicated renewal conversations?*
  - ❑ *How do we enable the team to recognize and capitalize on upsell/expansion opportunities for existing customers?*
  - ❑ *How do we track and review upsell/expansion pipeline?*
- ❑ NO TRACKING OF **KEY STAKEHOLDER RELATIONSHIPS** OR **ACCOUNT HEALTH**
  - ❑ *Who **checks in with customers** throughout the year, onboards new stakeholders, and asks for feedback throughout?*
  - ❑ *How do we track **overall account health** + what are the intervention plans for "red" accounts that get off track?*
  - ❑ *How do we **ask for and track references** from our happiest customers?*

Which of these is most lacking for your team? Starting with this simple diagnostic can help you decide how to focus your efforts

Customer Journey: Start with a simple summary of "Who Does What"

Create a simplified customer journey by summarizing who "owns" each piece of customer work

Responsible

Supportive

	Sales	Customer Success	Implemen-tation	Marketing	Notes + Other Considerations
Book **new logos**					Account Executive responsible
Onboard customers					CSM responsible
Drive **adoption and value**					CSM responsible with support from Implementation team
Harvest **brand advocates**					CSM responsible with help from marketing
Renewal					CSM responsible
Upsell / Expansion					Sales to support CSM where needed on bigger / more complex opportunities

Create a high-level "who does what" summary to clarify who owns each step (and who supports the owner to make it happen) – err on the side of including

Customer Journey: Use a RACI chart to get more detailed view

Breaking down the journey into bite-size steps helps you build out more detail on "who does what"

Portfolio Example: CultureIQ

Phase / Process	Sales: Account Executive	Sales: Account Manager	Sales: Sales Leadership	Mktg: Marketing	Culture Solutions: Client Success Manager	Culture Solutions: Strategist	Culture Solutions: Cust. Success Team Lead	Culture Solutions: CS Leadership (Sharon, Scott, Cat/
Sales to Culture Solutions								
Solutions Strategy Involvement (Strateg	R		C			C		A
Solutions Demo (CSM)	A		C		R		C	A
Develop Proposal	R		A		C		I	
Review Proposal	R		A				C	I
Resource Assignment	I	I	C		C	C	C	AR
Value Selling Plan Letter and Knowledg	R	I	A		I	I	C	
Internal S2S transfer meeting	R	C	A		C	C	I	
Build Welcome Deck	C	C	I		R	A	C	I
Welcome Call	R	C	I		C	A	I	I
Send Welcome Kit	I	C	I		R	C	A	I
Implementation								
Tailor Kickoff Deck	I	C			R	C	A	
Project Kickoff Call	I	C			R	C	A	
Build Program Schedule (Target, Basel		C			R	C	A	
Admin Platform Training		C			R	C	A	
Build Success Plan		C	I		R	C	I	A
Prep CultureTarget Workshop Deck		I			C	R		A
CultureTarget Workshop		I	I		C	R		A

"WHO DOES WHAT?"

We have built a high=level Customer Success RACI chart, which **summarizes who is involved at each step of our customer process**

R = Responsible - Does the work to complete the task AND communicates across to all others.
A = Accountable - Approver of task, accountable for correct completion.
C = Consulted - Provides input during task completion.
I = Involved - Kept up to date, often after the task is completed. One-way communication.

The RACI can be found at [INTERNAL LINK HERE]

At CultureIQ, we broke our customer journey into **"chapters"** – including:

- *Sales<>CS Handoff*
- *Implementation*
- *Adoption*
- *Optimization and expansion planning*
- *Renewal*

Our Operations Hub has an example RACI excel template you can use as a starting point – but don't go detailed before you lay out the simple version of your customer journey first!

Customer Journey: Focus on the 2-3 key "moments of truth"

Creating a "do this, not that" page can help your team focus on the behaviors that make the most difference

EXAMPLE MOMENTS OF TRUTH FROM CULTUREIQ'S CS WORK

Step in our process	Let's try to do THIS…	…instead of THAT
"We just closed a deal!" Sales to Culture Solutions transition	• Schedule an internal knowledge transfer call between Sales and Culture Solutions BEFORE our kickoff call w/ the customer	• Rush into our kickoff call with the customer without sharing what we learned while winning the deal
"Our customer is using the Enhanced Approach" CultureTarget/CultureBaseline/ CultureLaunch	• Implement our standard enhanced approach on the recommended timeline to provide immediate value to the customer	• Provide customized and non-standard options that increase hours to serve and slow and diminish value to the customer
"Our customer's agreement is ending" Renewal	• Schedule an internal account review meeting between Account Management and Culture Solutions BEFORE our renewal call with the customer	• Provide a renewal proposal to the customer without internal input from all relevant internal stakeholders

Focus 80% of your effort on building training + discipline around these key moments of truth – getting them right should pay huge dividends

Getting started – A simple CS refresher checklist

First steps to help you get (or stay) on track

- ❑ Review "what Customer Success can mean" – and summarize which team is responsible for each job-to-be-done today
- ❑ Capture your "dropped balls" list – the areas of opportunity or inconsistency that will make the most difference with your customers
- ❑ Start with a simple Customer Journey – build a one-page "who does what" summary (including who owns + supports)
  - ❑ Get more detailed with a RACI chart (if needed), especially where handoffs exist
- ❑ Focus in on the 2-3 "Moments of Truth" that will make the most difference with your customers, then build discipline around "doing this instead of that" in your Moments of Truth.