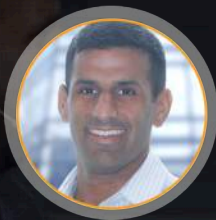




PRESENTING CUSTOMER SUCCESS TO YOUR BOARD



Nick Mehta
CEO
Gainsight



Roger Lee
General Partner
Battery Ventures





Nick Mehta @nrmehta

CEO Gainsight #customersuccess;

Join October 2007;

diehard: Steelers, family, blueberries;

curious: robots, quantum physics, progress;
Taylor Swift meets John Rawls

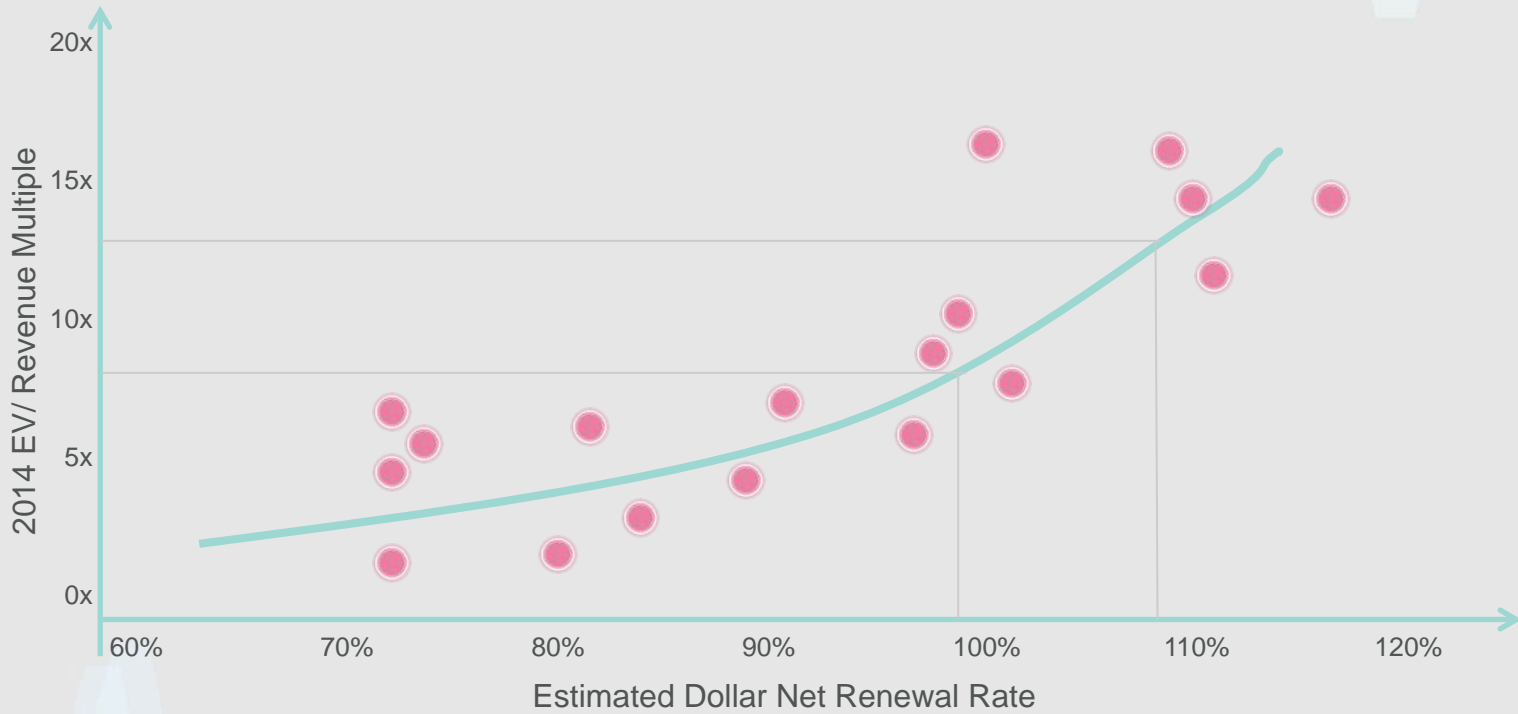
Board/Investor







Why Your Board Cares About Customer Success



Source: Altimeter and FactSet 10/2014



Why Does This Matter?

1. Elevate importance of Customer Success
2. Drive more budget toward Customer Success
3. Highlight issues across company to help CSM

**What should I
talk about to
my board?**



Board Meeting Basics

What To Cover

	Finance	Product	Marketing	Sales	Customer Success
Past	Actuals	Shipped	Leads	Bookings	Renewals / Up-Sell
Future	Forecast	Roadmap	Campaigns	Pipeline	Health



Board Meeting Basics

Types of Metrics

- Balance: Where we are today
- Trend: How we've performed over time
- Forecast: Where we're headed
- Vs. Plan: How this compares to goal

**CAVEAT: CUSTOMER NAMES
AND AXES BLURRED TO
PROTECT THE INNOCENT**

Past



Scoreboard: Customer Success

Scoreboard: Customer Success



Highs

- Accomplishment 1
- Accomplishment 2
- Accomplishment 3

Lows

- Issue 1
- Issue 2
- Issue 3

**What was our
retention rate?**



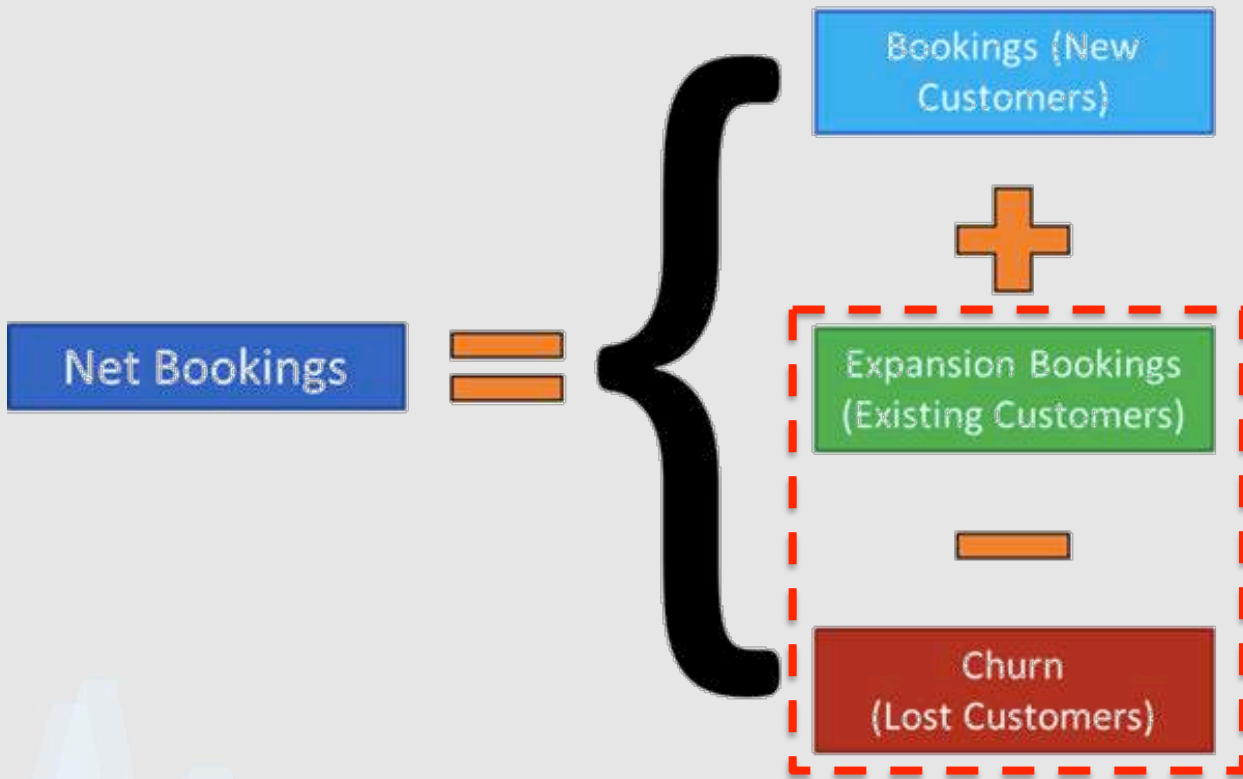
Customer Success for the Board

200%!!!!





Customer Success for the Board



Source: David Skok, Matrix Partners



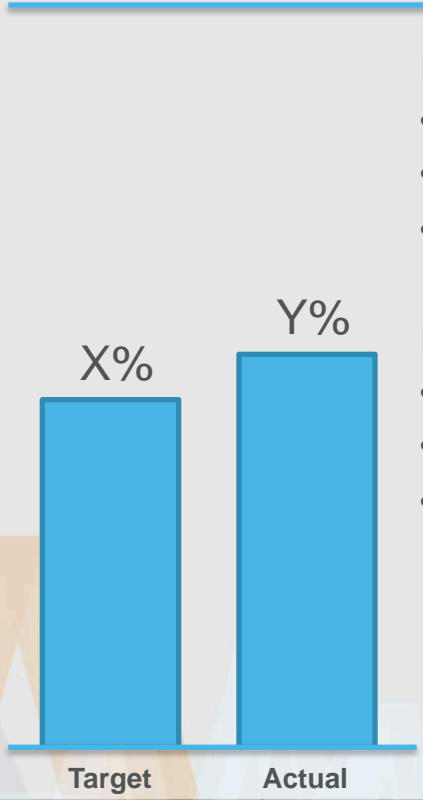
Get Agreement On...

- Dollar churn or customer churn?
- Include price decreases and downgrades?
- Include price increases and upgrades?
- Churn on total ARR/MRR or churn on renewable amount?
- Controllable versus uncontrollable churn?
- Churn by cohort?



Scoreboard: Customer Success

Gross Retention



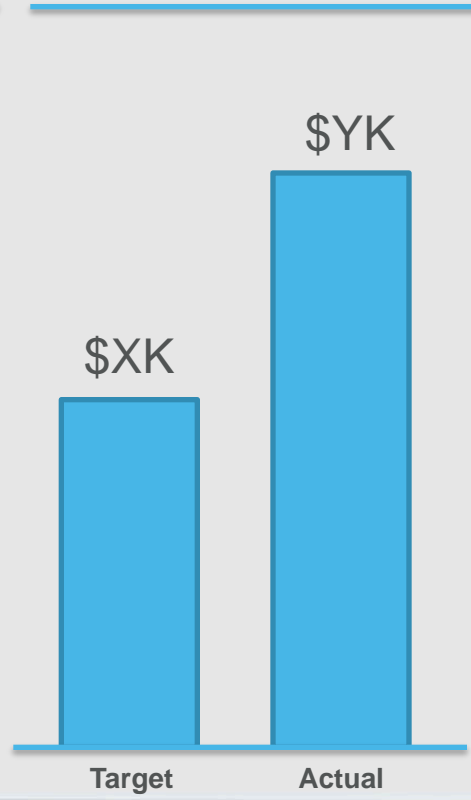
Key Renewals:

- Customer A: \$XXXX
- Customer B: \$XXXK
- Customer C: \$XXXK

Key Churns:

- Customer A: \$XXXX
- Customer B: \$XXXK
- Customer C: \$XXXK

Up-sell

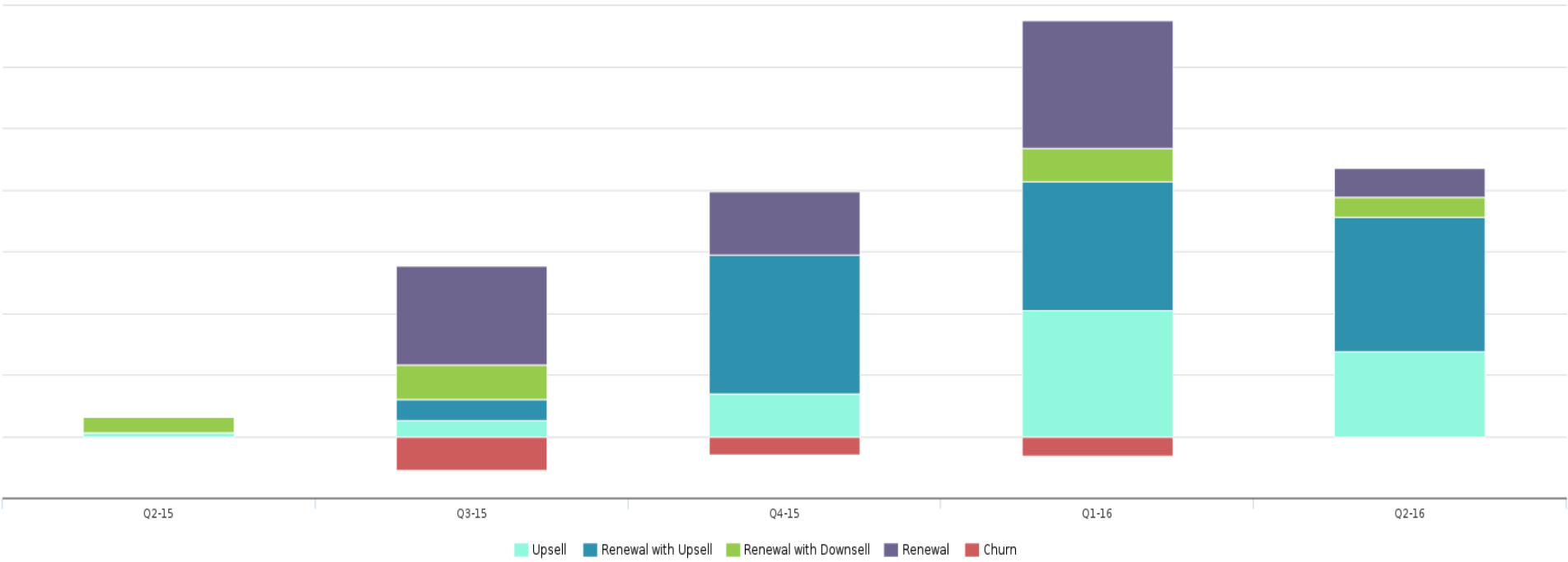


Key Up-sells

- Customer A: \$XXXXK
- Customer B: \$XXXK
- Customer C: \$XXXK



Past: Net Renewals By Quarter





Which Renewals Did We Recently Close?

Transactions: Renewals Closed - Expiring in Qtr

Customer	Booking Type	Account Name	ARR	ARR δ
			>= ARR	>=
Regent's Club Inc	Renewal	Regent's Club Inc	\$ 175,000	\$ 0
Wentworth Software Inc	Renewal	Wentworth Software Inc	\$ 21,329	\$ 0
Landline	Renewal with Downsell	Landline	\$ 20,970	\$ -1,782
Lawrence Software Inc	Renewal with Upsell	Lawrence Software Inc	\$ 38,963	\$ 6,122
Philly Inc	Renewal with Upsell	Philly Inc	\$ 46,682	\$ 28,350
Wentworth Inc	Renewal with Upsell	Wentworth Inc	\$ 62,370	\$ 9,457



Which Up-sells Did We Recently Close?

Transactions: Upsells Closed this Quarter



Customer		Booking Type		Account Name		ARR ∇	ARR δ
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
<input type="text"/>	Upsell	<input type="text"/>	<input type="text"/>	<input type="text"/>	\$ 10,500	\$ 10,500	
<input type="text"/>	Upsell	<input type="text"/>	<input type="text"/>	<input type="text"/>	\$ 6,538	\$ 6,538	
<input type="text"/>	Upsell	<input type="text"/>	<input type="text"/>	<input type="text"/>	\$ 6,322	\$ 6,322	
<input type="text"/>	Upsell	<input type="text"/>	<input type="text"/>	<input type="text"/>	\$ 5,310	\$ 5,310	
<input type="text"/>	Upsell	<input type="text"/>	<input type="text"/>	<input type="text"/>	\$ 4,900	\$ 4,900	
<input type="text"/>	Upsell	<input type="text"/>	<input type="text"/>	<input type="text"/>	\$ 3,100	\$ 3,100	

**What are our
operational
metrics?**



Scoreboard: Services – Time to Launch

Time to launch decreasing over time

Quarter Closed	Median Calendar Days to Launch	Minimum Calendar Days to Launch
Q3 2013		
Q4 2013		
Q1 2014		
Q2 2014		
Q3 2014		
Q4 2014		



Scoreboard: Support – Ticket Trend

Increasing adoption driving higher ticket volume

Customers engaging support more quickly and CSMs sending to Support

New Tickets Created by Month



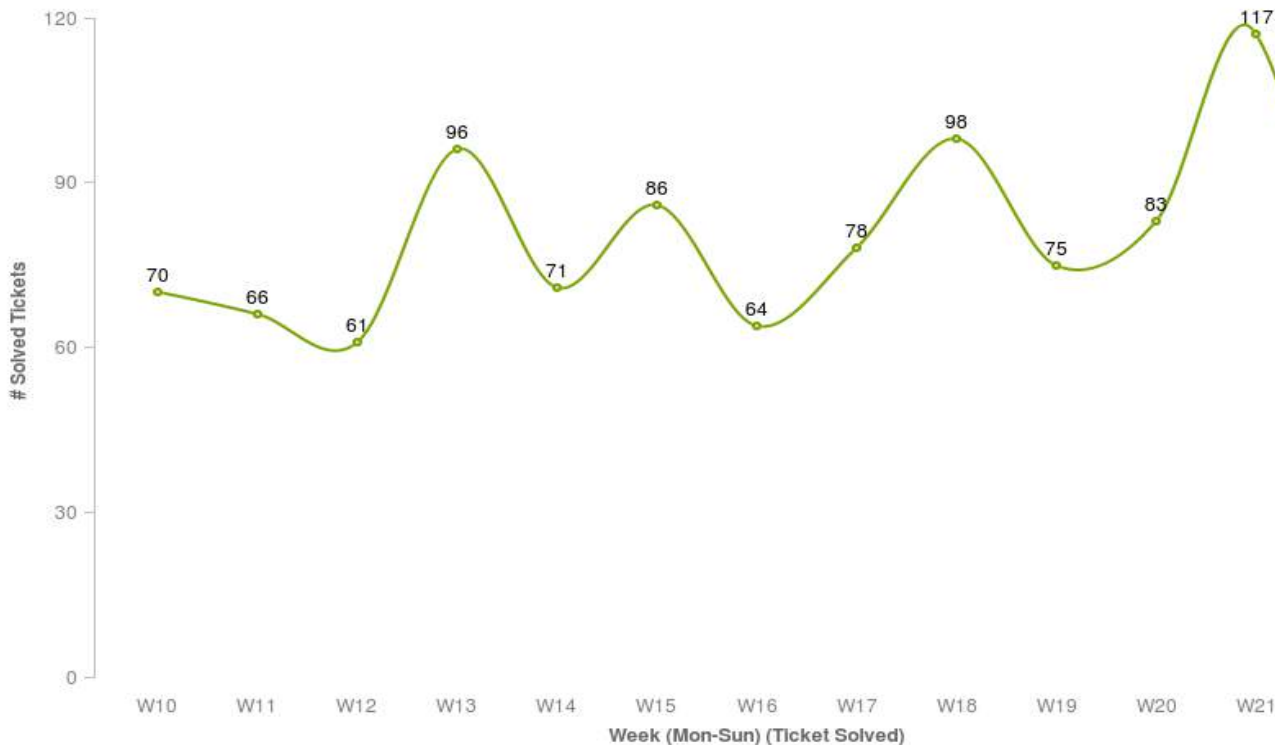


Scoreboard: Support – Ticket Solved Trend

Scaling with increasing support volume - good ramp by team

12 weeks from 5-25-15

Solved Tickets by Week (13 Weeks)





Scoreboard: Support – Top Customers and Categories

Increasing adoption driving higher ticket volume

Tickets by Category (Top 5): From Feb 2 to May 26

Rules Engine	246
Cockpit/CTA/Playbook	170
Reporting	125
Customer 360	110
Surveys	100



Scoreboard: Support – Community Metrics

Steady growth of community – especially on Ideas

Through 5-25-15

New Users by Month

Month/Year (User Create)	New Members
Mar 2015	34
Apr 2015	22
May 2015	20

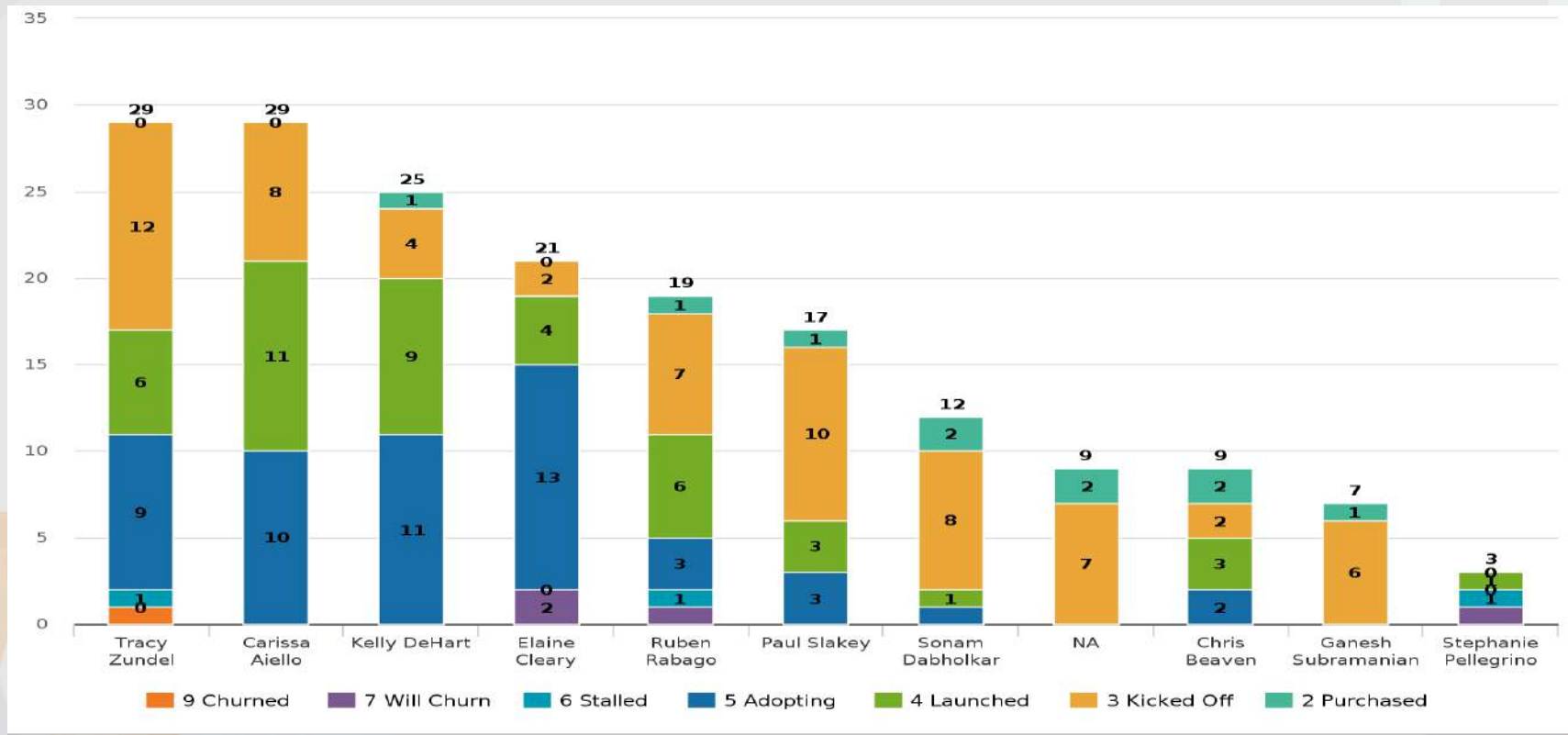
New Topics by Month

Month/Year(Topic Create)	New Topics	#Ideas	#Questions	#Problems
Feb 2015		3	0	0
Mar 2015	28	27	5	1
Apr 2015	30	45	5	4
May 2015	16	25	6	7



Scoreboard: CSM – Account Load

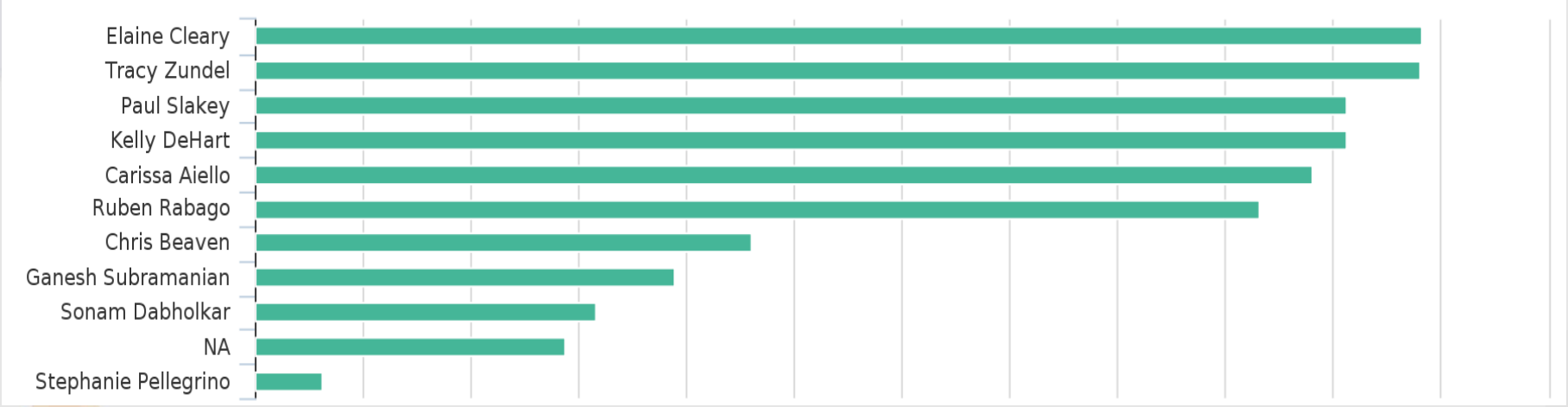
Hiring causing range of load





Scoreboard: CSM – ARR Load

Trending toward target of \$1.2 MM /CSM



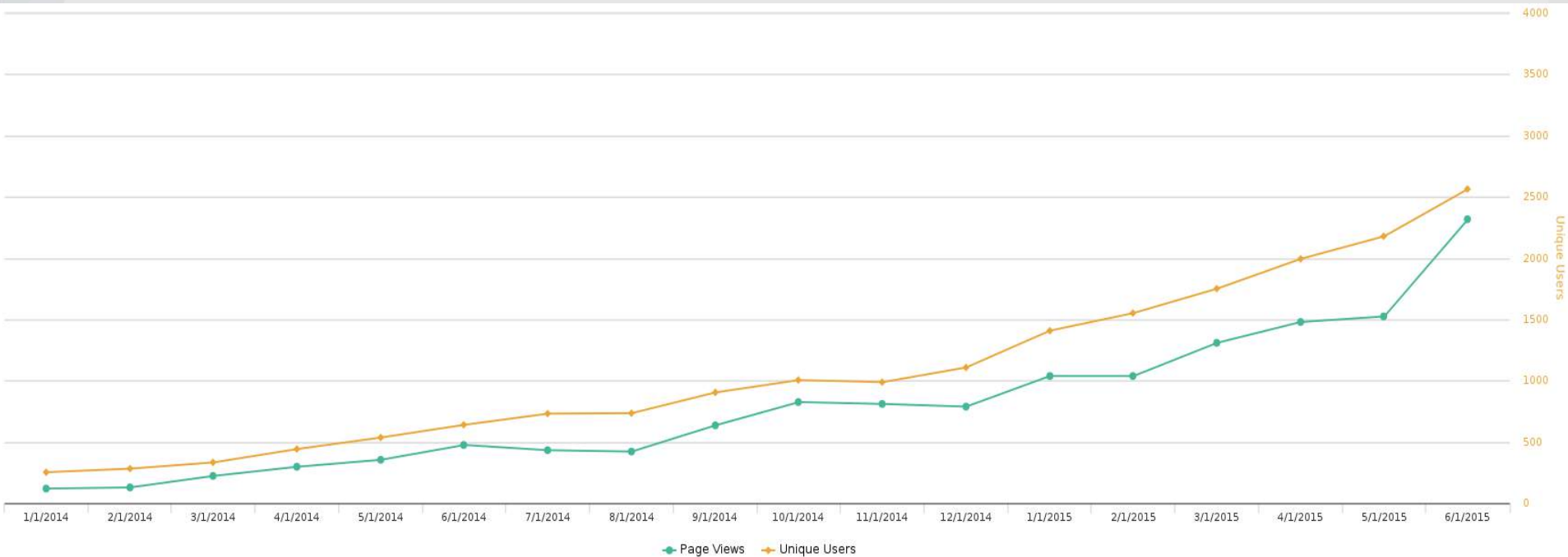
**How is
adoption
trending?**



Scoreboard: Adoption Trend

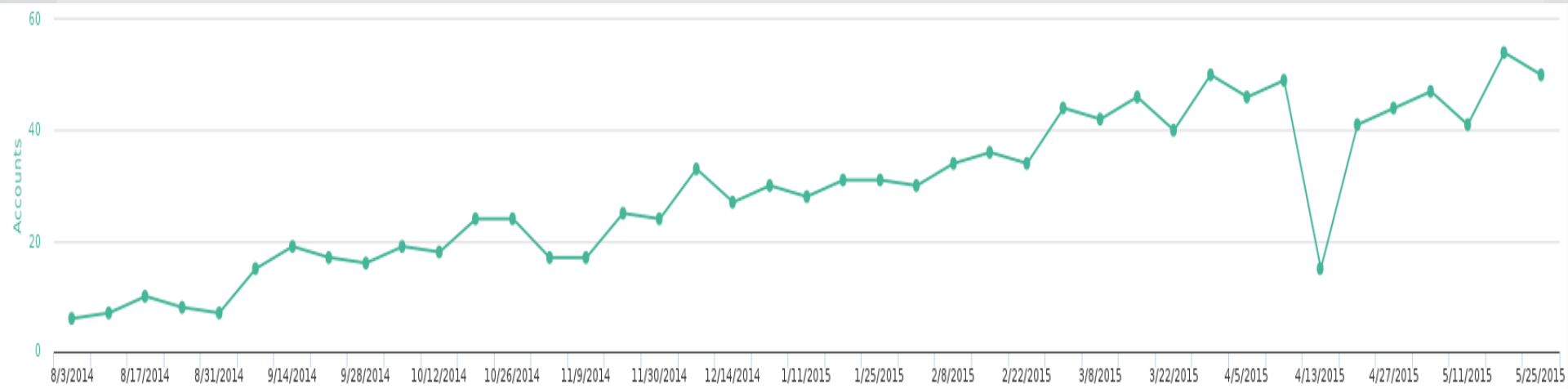
Adoption trending up % x MoM

Actions per user up %Y Mom





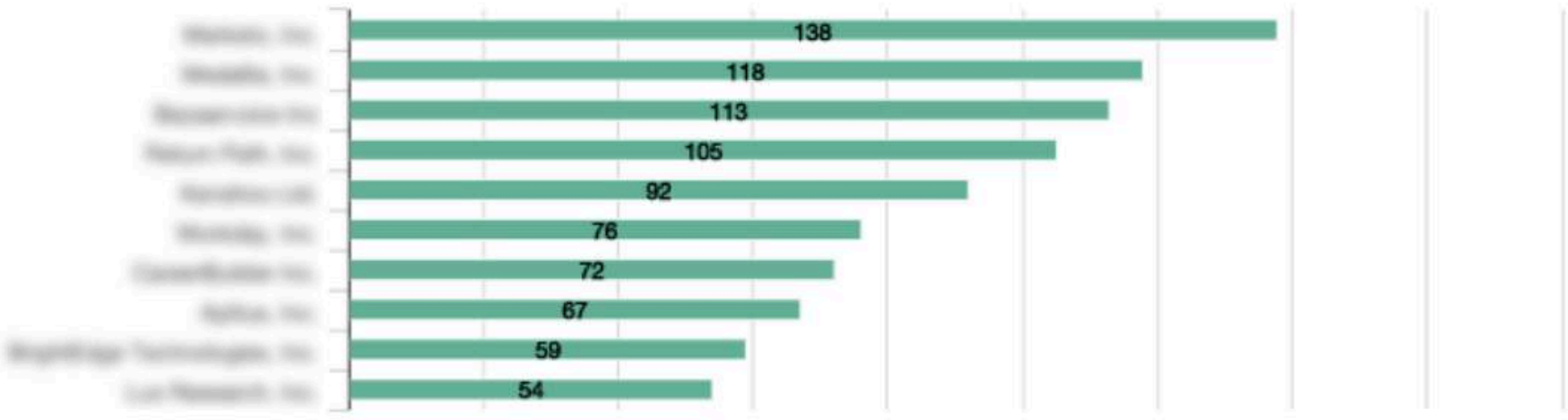
Scoreboard: Key Feature Adoption Trend





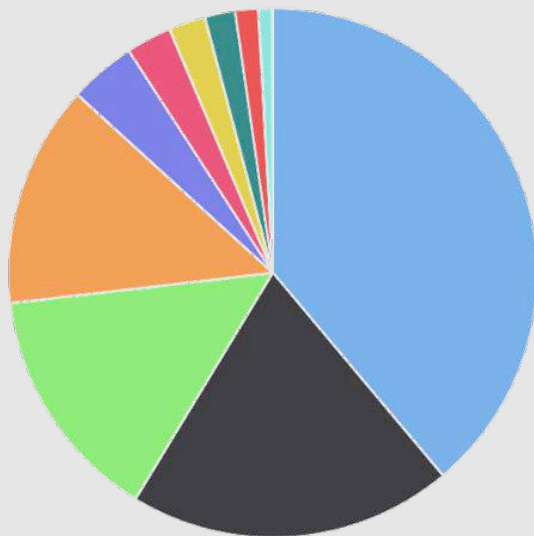
Who Are Our Top Usage Customers?

Gong GA Day Agg: Top 10 Accounts by Unique Users





Scoreboard: Top Features by Usage



- Customer Success 360 (38.9%)
- Gainsight Home (19.8%)
- Cockpit - List (14.5%)
- Customers - Customers (13.6%)
- Administration - UI Settings (4.1%)
- Rules Manager (2.8%)
- Administration - Customers (2.3%)
- Reporting 2.0 (1.9%)
- GSMEditScorecard (1.4%)
- Adoption - Usage (0.9%)

**Are customers
happy?**



Scoreboard: NPS



NPS Score

45

Participation Statistics	Customers	Users
Distribution	73	1064
Responses	19	20
Promoters	10	11
Passives	7	7
Detractors	2	2

Promoters 11 Passives 7 Detractors 2

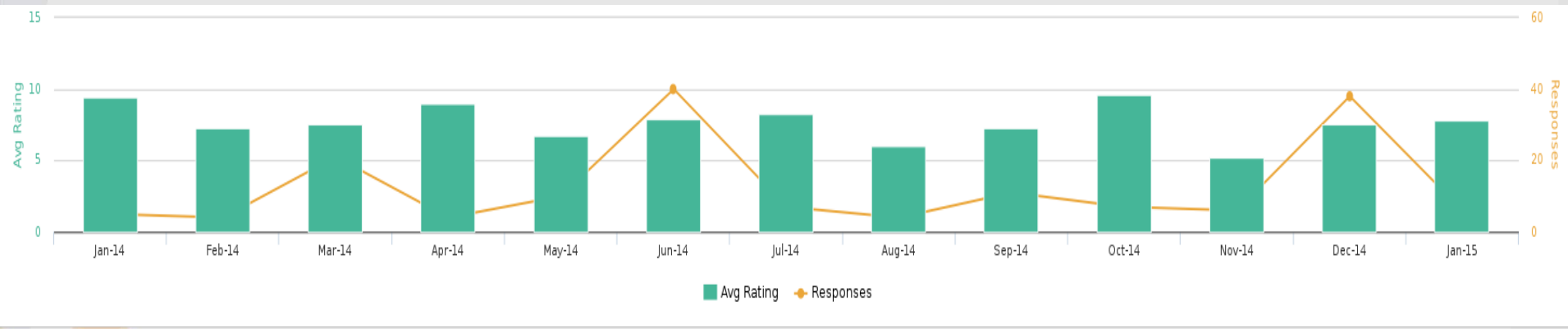
Promoters

Customer	User Name	Opportunity	Score	Role	Renewal Date	Created Date	CSM
					mm/dd/yyyy		
			10	Executive Sponsor	03/31/2016	02/10/2015 02:44 PM	Elaine Cleary
			10	Executive Sponsor	10/21/2015	02/11/2015 09:47 AM	Paul Slakey
			10	Executive Sponsor	05/16/2016	02/11/2015 11:04 AM	Carissa Aiello
			10	Executive Sponsor	09/29/2015	02/19/2015 08:03 AM	Elaine Cleary
			10	Executive Sponsor	10/30/2016	02/20/2015 12:25 PM	Paul Slakey
			10	Executive Sponsor	01/30/2016	02/23/2015 12:28 PM	David Knox
			10	Executive Sponsor	03/15/2016	02/24/2015 07:12 AM	Tracy Zundel
			9	Executive Sponsor	06/29/2016	03/09/2015 05:53 PM	Tracy Zundel

Page 1 of 1 100



Scoreboard: NPS



**What is
working?**

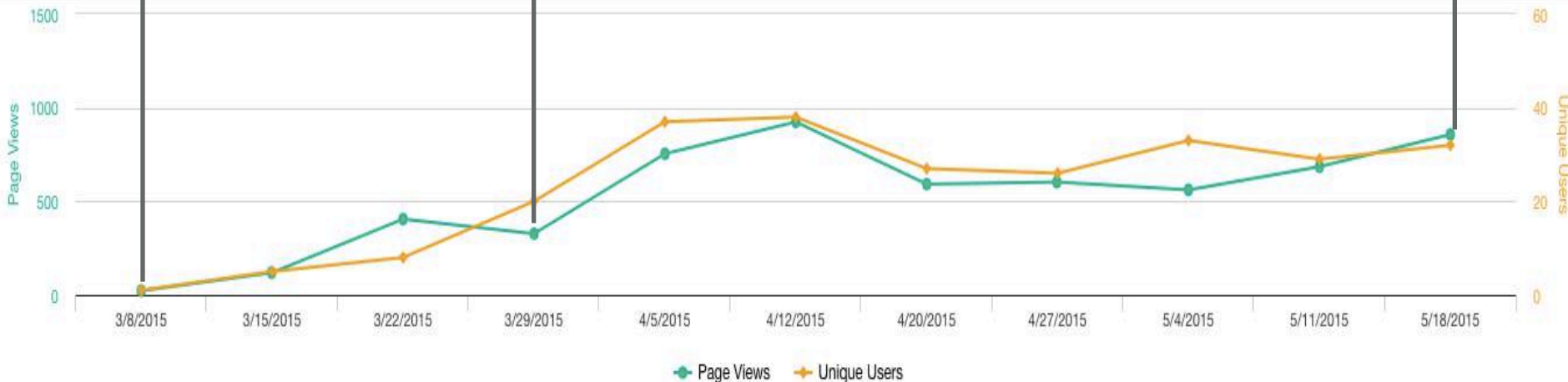


Success Story 1: [Company Name]

- Phase 1 of 2 in implementation completed in ~8 weeks
- Launched with 3 Risk CTAs and 1 Expansion CTA for high-touch CSMs

- Equipped exec sponsor with change management templates
- Trained managers as mini-adoption champions
- Created dashboards for them to track their own adoption

- Launched CoPilot for low-touch CSMs
- Included additional Risk CTAs
- Trained managers to use Gainsight in 1:1 meetings with team members





Scoreboard: Success –Reviews (AppExchange)

41 Lifetime reviews:



Steven D - Express Implementation was very valuable

★★★★★

We have just completed the Express Implementation with Gainsight and I found it immensely helpful in working through minor issues and making sense of a very complex and powerful product. My only concern has been that the documentation is somewhat incomplete: many times during the workshop we deviated from documentation and, without having the ...[More](#)

May 21, 2015 at 11:11 AM · [Comment](#) · [Like](#) · [Report Abuse](#)



Mike Gettman - Stands out amongst competitors

★★★★★

We've been using Gainsight for over 2 years and have been impressed with the company's growth, on-target product roadmap, and bustling capabilities. The product looks better than ever and the new cockpit feature has enabled our CSMs to be alerted to changes the events, risks, and opportunities that mean the most to our business. We are hitting our ...[More](#)

May 08, 2015 at 4:34 PM · [Comment](#) · [Like](#) · [Report Abuse](#)



Kristin Lucas - Gainsight brings efficiency and scalability to Account Management

★★★★★

We are in the first phases of our implementation and I can already see the huge value it will bring. The Gainsight application will enable us to become very efficient within our Account Management (aka Customer Success) teams. It solves problems of scalability, maximizing on best practices and visibility to customer status, both good and bad. ...[More](#)

Mar 23, 2015 at 4:39 PM · [Comment](#) · [Like](#) · [Report Abuse](#)



Kate Popp - Gainsight Support & Success teams are terrific

★★★★★

The Success and Support teams have been amazing in our implementation time. Once you get the hang of thinking through the data, it's fairly easy to connect new sources and make tweaks along the way. When it wasn't easy, Gainsight Go usually had the answer for me in a matter of minutes, or Support would answer within hours. 5 stars from me.

Mar 13, 2015 at 12:25 PM · [Comment](#) · [Like](#) · [Report Abuse](#)



Scoreboard: Success –Reviews (TrustRadius)

Newer review site
10 lifetime reviews:



Gainsight Review: "Great Product with awesome potential!"



by Yossi Truzman, PMP, PRINCE2 - Customer Success Manager at Clarizen

★★★★★5 out of 5

Gainsight is being used primarily by the Customer Success Department, and is addressing our needs to scale and drive proactive behavior, thus helping us reduce churn and promote expansions.

4 | 0 | 0

[Read Yossi Truzman, PMP, PRINCE2's Full Review»](#)

Gainsight Review: "Leading the Customer Success Technology & Practice Shift"



by Team Lead in Professional Services at a Computer Software company with 1001-5000 employees

★★★★☆4 out of 5

Gainsight is being used for account management and customer success management (CSM) across both corporation and enterprise buckets.

6 | 0 | 0

[Read the Full Review»](#)

User Review: "Gainsight.CSM pole-position"



by Horia Pitulescu - Senior Manager Cloud at Hewlett-Packard

★★★★★5 out of 5

Gainsight may be used to formalize the customer success management (CSM) practice.

8 | 0 | 0

[Read Horia Pitulescu's Full Review»](#)

Review: "Gainsight helped us to standardize process and scale"



by Alan Poole - Strategic Customer Success Manager at Informatica

★★★★★5 out of 5

Gainsight is used by the Customer Success Team to manage workflow and to help build and provide analytics and a complete view of customer health. The 360 view of the customer lets a CSM prepare for a customer interaction in a very short time. The efficiencies gained allow us to increase the number...

6 | 0 | 0

[Read Alan Poole's Full Review»](#)

User Review: "Go get Gainsight now!"



by Zach Boisi - VP of Global Client Success at Lotame

★★★★★5 out of 5

Gainsight is used by the Client Success, Sales, Marketing, Product and Executive teams to monitor the health of our global client base. It helps us to see all interactions and information about each client: logins, support tickets, product adoption, etc.

6 | 0 | 0

[Read Zach Boisi's Full Review»](#)

"Gainsight review from early impression"



by Greg Haugen - Customer Success Territory Manager at JAMF Software

★★★★☆4.5 out of 5

Gainsight is being used to help us make our Customer Success and Support departments more efficient, and to help increase/maintain our high retention rate. We are using the survey functionality, as well as developing a customer Health Score that will help reduce the time to prepare for a call to...

9 | 0 | 0

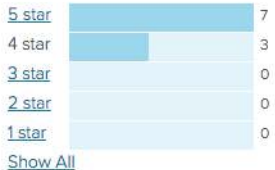
[Read Greg Haugen's Full Review»](#)



Scoreboard: Success –Reviews (G2Crowd)

Newer review site
10 lifetime reviews:

Gainsight Review



[Ryan Horlacher](#)



Updated On June 26, 2015

Validated Review Verified Current User

0
Helpful

Gainsight makes our data actionable.

What do you like best?

Before Gainsight, we were spending a lot of time just looking at our accounts to see if there was a need for contact. Gainsight allows us to spend less time looking for things to do and more time doing what needs to be done. While we are working the accounts that need attention, Gainsight is monitoring all other account to let us know as new needs arise.



[Nick Sorensen](#)



Updated On June 26, 2015

Validated Review Verified Current User

0
Helpful

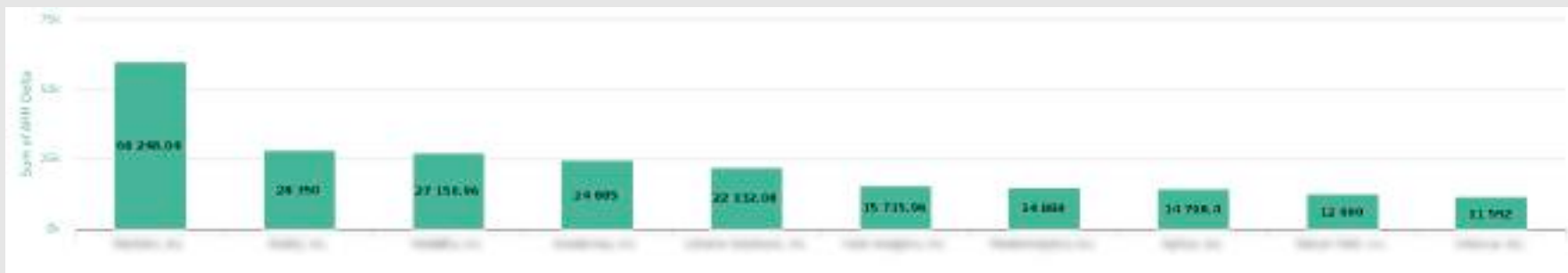
Industry leading customer success solution in my opinion

What do you like best?

Industry-leading feature-set, highly customizable and very quick release cycle. They have the momentum and resources to continue to lead the industry moving forward. Love the annual Pulse conference they put on. Their team is amazing to work with.



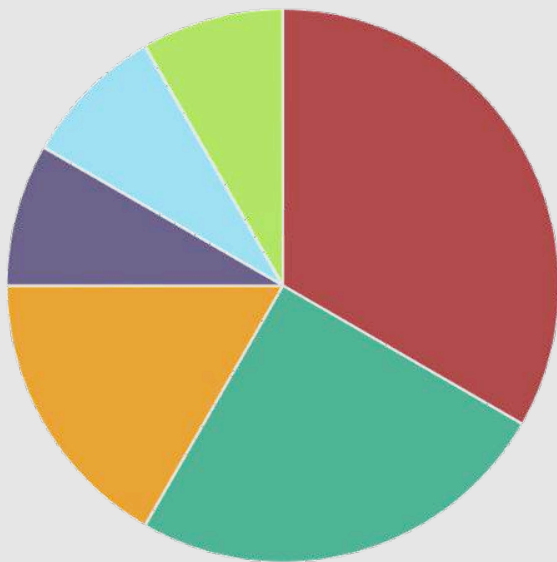
Past: Top Up-sells By Customer



**Why are
customers
leaving?**



Past: Churn By Reason



- Incomplete Onboarding (33.3%)
- Lost to Competitor (25.0%)
- Low Adoption (16.7%)
- Acquisition (8.3%)
- Lost Champion (8.3%)
- Other (8.3%)

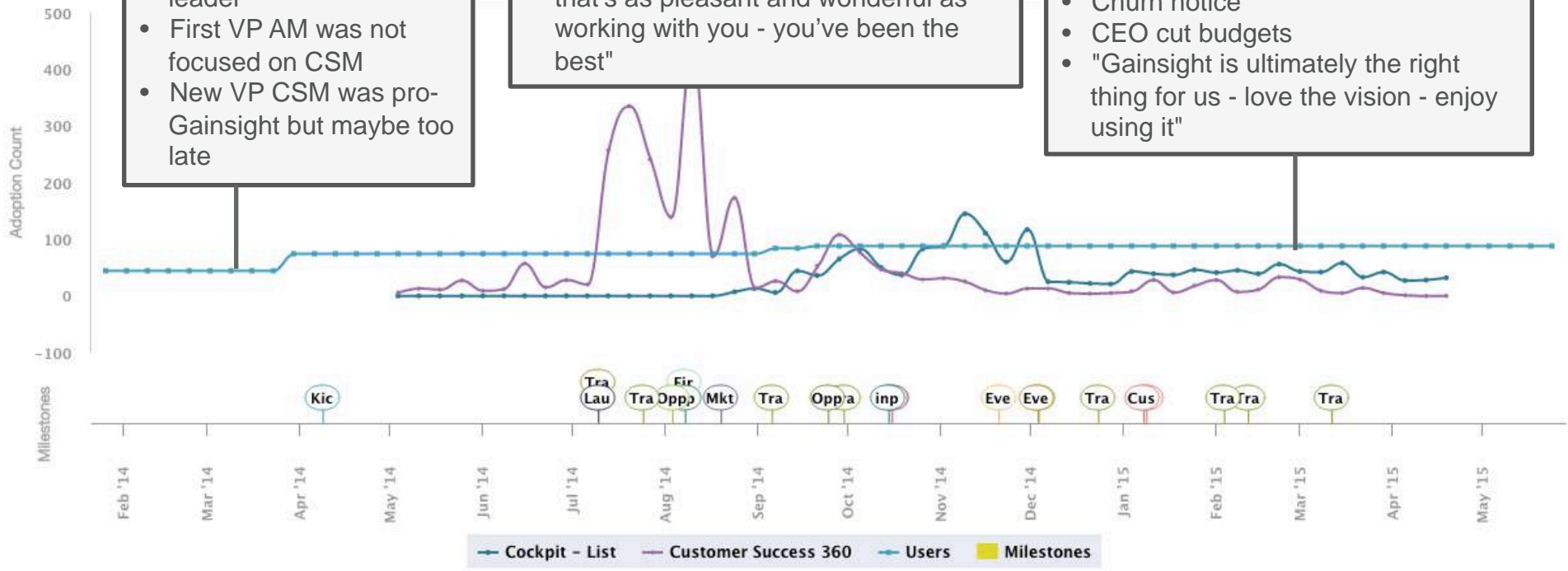


Churn Story 1: [Customer Name]

- Our contact was ops leader
- First VP AM was not focused on CSM
- New VP CSM was pro-Gainsight but maybe too late

- Never got broad adoption, although Ops started to push the roll-out
- "Never had a business relationship that's as pleasant and wonderful as working with you - you've been the best"

- Churn notice
- CEO cut budgets
- "Gainsight is ultimately the right thing for us - love the vision - enjoy using it"





Past

Other Factors to Look At

- Same metrics by region, vertical, product, segment
- Churn by reason
- Top churns and up-sells
- Churn and up-sell by cohort

Future

**What is our
risk in our
installed base?**



Future

Customer Health Indicators

Too Late

Churn

Frustration

Low NPS scores
Long support TTR
Not referenceable

Success

“Sticky” feature usage
Proven ROI
Increasing adoption

Lagging Indicators
Indicators

Leading

Silence

Churn inquiry
Late payments
No product usage

Disengaged

Not opening emails
Declining adoption
Sponsor leaves



Risk 3.0: Company-Wide

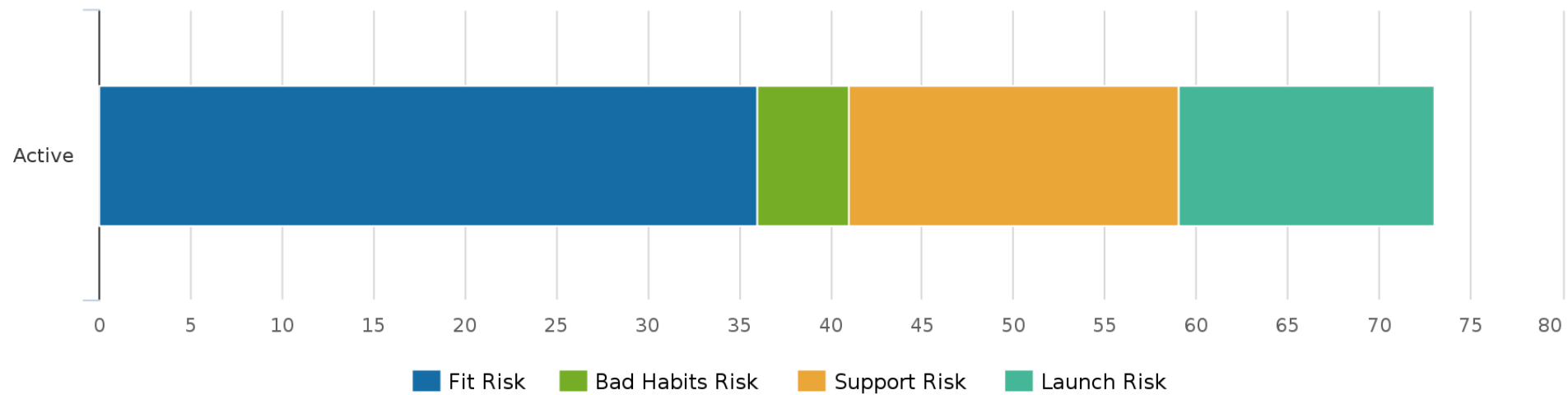
	1 Readiness	2 Product	3 Bugs	4 Implementation
GM	VP Sales	VP Product	VP Engineering	VP Services
Definition	Customer is not a standard use-case, or not ready for GS	Customer views something as a bug, but truly it's a feature request	High volume / high priority of bugs for that customer	Project plan is delayed

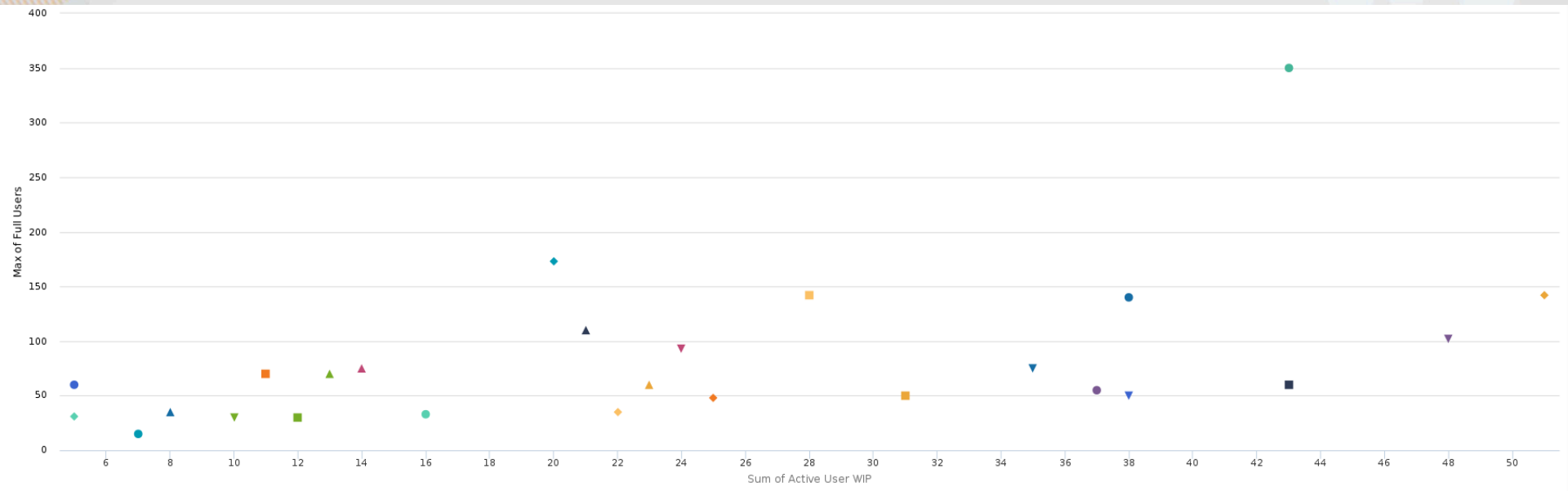
	5 Support	6 Company	7 Sentiment	8 Habits
GM	VP Services	VP Customer Success	VP Customer Success	VP Customer Success
Definition	Customer has high priority, volume or duration of tickets open	Something about the company has changed that is impacting their GS use (e.g. lose advocates, financial difficulty, re-org)	Customer isn't happy or has experienced many risks with GS	Customer isn't using our product significantly



8 categories of customer success

		Fit	Product	Bugs	Implementation	Support	Company	Sentiment	Habits
	GM:	VP Sales	VP Product	VP Eng	VP Services	VP Services	VP CSM	VP CSM	VP CSM
Scorecard	RED	"Not a Fit"	CTA flagged	CTA flagged	CTA flagged	CTA flagged	CTA flagged	Exec Detractor or Fatigue Risk	Risk CTA
	YELLOW	"New Use Case, non-SFDC"	CTA open (manual/ auto)	CTA: support tkt	CTA open (auto)	CTA open (auto)	CTA open (manual/ auto)	Else	Oppt'y CTA
	GREEN	"Meets Criteria"	No CTA	No CTA	No CTA	No CTA	No CTA	Exec Promoter NPS	No CTA
Cockpit	CTA owner	--	PM (pre-Launch) / CSM (post-Launch)	Support (Emily)	PM (pre-Launch) / CSM (post-Launch)	CSM	CSM	CSM	CSM







Which Clients Are Taking Too Long In Onboarding?

Customers: Onboarding - Over 90 Days from OCD



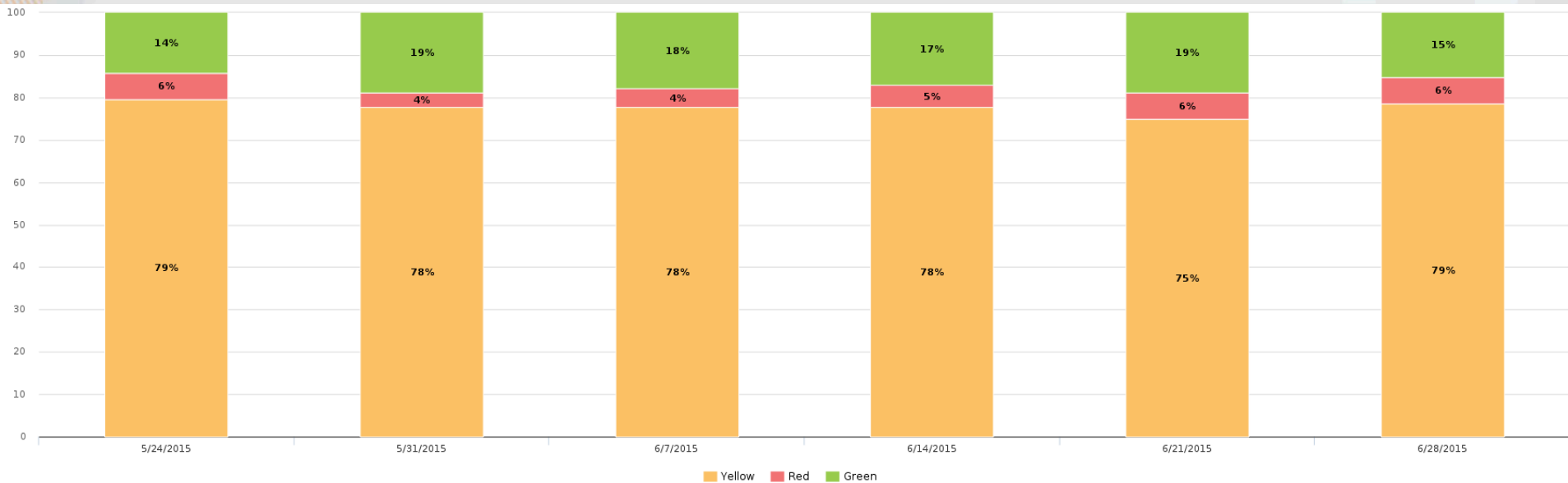
Customer	Customer Lifetim...	Project Manager	CSM	Stage
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	>=			
	3	Marie Sahrman	Ruben Rabago	3 Kicked Off
	4	Kendra McClanahan	Stephanie Pellegrino	3 Kicked Off
	4	Lisa Mirth	Tracy Zundel	3 Kicked Off
	4	Kendra McClanahan	Tracy Zundel	3 Kicked Off
	4	Lisa Mirth	Stephanie Pellegrino	3 Kicked Off
	4	Marcus McClure	Elaine Cleary	3 Kicked Off



Which Clients Aren't Using Our Product?

Renewal Date	Account Name	Page Views ▲	Active Users	Licenses
<input type="text" value="mm dd yyyy"/> x	<input type="text"/> x	<input type="text"/> x	<input type="text"/> x	<input type="text"/> x
09/30/2016	Account A	0	0	20
01/01/2016	Account B	0	0	15
12/29/2015	Account C	0	0	60
10/05/2015	Account D	0	0	10
03/06/2016	Account E	0	0	10
06/29/2016	Account F	0	0	10
12/05/2015	Account G	0	0	5
08/30/2015	Account H	0	0	5
06/29/2015	Account I	0	0	10
03/30/2016	Account J	0	0	20
04/29/2015	Account K	2	1	5
12/30/2015	Account L	2	1	30

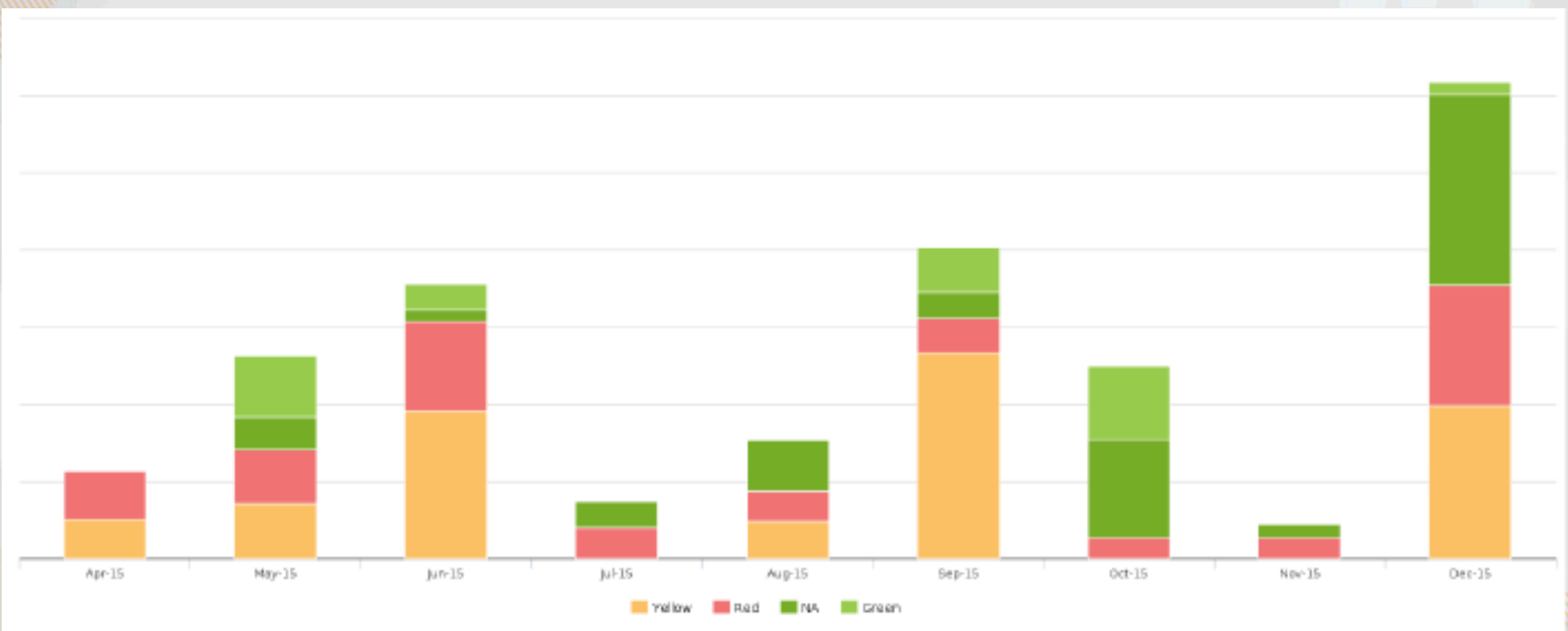
**Are things
getting better?**



**What is our
forecast?**



Future: Renewal Forecast



**What are your
initiatives?**



Q2 Plays

Play 1

- Initiative 1
- Initiative 2
- Initiative 3

Play 2

- Initiative 1
- Initiative 2
- Initiative 3

A black and white photograph of Albert Einstein. He is shown from the chest up, wearing a dark, textured sweater. His hands are clasped together in front of him, with his fingers interlaced. He has his characteristic wild, white hair and a mustache. The background is dark and out of focus.

**“NOT EVERYTHING THAT CAN BE COUNTED
COUNTS, AND NOT EVERYTHING THAT COUNTS
CAN BE COUNTED.”**

ALBERT EINSTEIN

© Lifehack Quotes

All Things #customersuccess



- 3 Building the CSM Team
- 2 Case Study
- 7 Customer Success Manager 101
- 10 Executive Perspectives
- 5 Metrics
- 13 Organizational Alignment
- 8 Process



Customer Success Beat

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