Achieving Synchronicity: Nailing the Hand-off Between Sales, Services, CSM

Host: J.B. Wood CEO TSIA

Panelists: Kevin O’Came, CA Technologies Boaz Moar, CS Start-up Exec Aaron Fulkerson, Mindtouch
Kevin O’Came  
VP, Customer Success  
CA Technologies

Kevin is Vice President of the CA Technologies Customer Success team.

In this role, Kevin leads the worldwide Customer Success field teams and the Net Promoter Score program for CA Technologies. Kevin is responsible for orchestrating an integrated customer experience that delivers successful business outcomes to customers and partners that have invested in the CA Technologies portfolio of solutions.

Kevin joined the company in 1998 and has held progressive positions within Worldwide Sales and Operations and Customer Success organizations during his 17 year career at CA Technologies.
Boaz Moar
Customer Success Exec – Start-Ups

https://www.linkedin.com/in/boaz-s-maor-84810b
Twitter: @boazmaor

Bio: VP of Customer Success at Mashery (API Mgt company acquired by Intel then Tibco)
Prior to that VP Sales and Marketing at Wave Guard Technologies (Green-Tech start-up), VP Customer Success at newScale (IT Service Catalog provider acquired by Cisco) and General Manager, Business Process Outsourcing and General Manager, High-Tech Business Sector at FreeMarkets

Travelled through China for a year with his wife and kids
Creator of the Customer Success title on wikipedia... :-)
Aaron Fulkerson is a founder and the CEO of Mindtouch, a SAAS provider that uses product and support content to drive customer engagement and success.

Previously, at Microsoft in Advanced Strategies and Policies where he researched distributed systems. Aaron has informed national education policy at the White House. He has been a contributing writer at CNN, Fortune, Gigaom, ReadWriteWeb, TechWeb, CMSWire and Forbes Magazine.

Strive to live anecdotally because your life is your story. Make it a great read.

How Much Revenue Can I Get From Each Customer?

Supplier Success

Customer Outcomes

How Much Business Value Can I Generate For Each Customer?
Separate, Complimentary Perspectives

**Supplier Perspective**

- **Lifecycle Construct:** LAER
- **Roadmap:** LAER Capabilities Heatmap
- **GOAL:** Maximum Spending

**Customer Perspective**

- **Lifecycle Construct:** PIMO Outcomes
- **Roadmap:** PIMO Lifecycle Service Offers
- **GOAL:** Business Outcomes
THE INTERNAL PERSPECTIVE: TSIA LAER - An Operating Framework

LAND

ADOPT

EXPAND

RENEW

Effectiveness
Efficiency
Data Quality
Stickiness
Quantity
Who

Consumption Analytics Platform

Land New Customer

Outcome Engineering
Customer Success Team
Customer Service Teams

Large Upsell Sellers
Upsell Sellers
Renewal Sellers
X-Sell Sellers

Descriptive Analytics
Predictive Analytics
Outcome Analytics

GOAL:
Maximum Customer Spending
THE CUSTOMER PERSPECTIVE

Customer’s Can’t Act on LAER. They Can Act on PIMO.

Lifecycle Construct: PIMO Outcomes

WHAT
- Plan
- Implement
- Monitor
- Optimize

Roadmap: PIMO Lifecycle Service Offers

GOAL:
Improved Business Outcomes
THE CUSTOMER PERSPECTIVE
PIMO - An End-to-End Engagement Model

- **Customer**
  - Business Buyer
  - Business Engineers
  - IT Team
  - End Users
  - Business Managers
  - IT Ops

- **Supplier**
  - Sales Team
  - Solution Engineers
  - PS
  - Education
  - Consumption Analytics
  - Support

**Deal Close**
**Plan**
**Implement**
**Monitor**
**Optimize**

Growing Customers Successfully
In the Middle of All This…

Lifecycle Construct: LAER

Roadmap: LAER Capabilities Heatmap

Customer Success

Lifecycle Construct: PIMO Outcomes

Roadmap: PIMO Lifecycle Service Offers

Plan Implement Monitor Optimize
Considerations for the handoffs

- What is the charter of your CSM organization?
  - Adopt/Consume
  - Renew
  - Expand – additional txns
- On-prem vs SaaS vs Non-tech subscription/repeatable?
  - Availability of data makes a big difference
- Handoffs could come from simply transferring information or overlapping engagement touch points
Handoff #1: Initial Sales To CSM

1. WHY - Desired Customer Business Outcomes
2. WHAT - What Has Been Committed?
3. HOW - Priorities/Opportunities Across the Timeline
4. WHO - People and Relationship Handoffs
Customer Success Orchestration

The entire company
Put customers at the center, work across the journey to help them achieve desired outcomes, measure your success through their success.

Proactively engage customers during the user journey

Find out how you can help customers get even more value from their investments with you

…and as a result, optimize the customer experience and positively affect your financial performance
Welcome
Go Beyond the CRM System

- Sales Handoff Interview: Deeply understand expected business value
- Host welcome call: Commitment to customers and transition relationships
- Confirm scope, milestones and identify project roles vs governance for success.

Onboarding
Prepare for Success & Take the Lead

- Formal kickoff
- Resources available to ensure success
- Confirm expected value along with requirements, milestone, timeline, roles and risks
- Review future phases and how and when to address them

Implementation
Prepare for value capture

- Support “Hot Site” process
- Observe and recommend ongoing learning plan
- Identify future opportunities and align to future phases
- Review plan to ensure adoption and value capture

High Touch
1:Few
Welcome
Power with Alerting
- Capture details of what was sold and alert team to initiate welcome call
- Online resources for new users to guide experience delivery

Onboarding
Prepare for Success & Take the Lead
- Capture expanded contacts
- Automated nurture communications & Standardized Templates
- Enrollment in resources to ensure engagement and success

Implementation
Prepare for value capture
- Track and ensure that products are installed
- Automated email nurture from product marketing
- Outline high-level success plans
- Capture Feedback
- Identify opportunities

LEVERAGE THE POWER OF ALERTING AND AUTOMATION FOR SCALE AND IMPACT

Low Touch
1:Many
Handoff #2: Ongoing Adopt/Expand/Renew Handoffs From/To Other Orgs

1. **STATE** - Current State/Issues (Product, Support, Sales)
2. **WHY** - Desired Customer Business Outcomes
3. **WHAT** - What Has Been Committed?
4. **HOW** - Priorities/Opportunities Across the Timeline
5. **WHO** - People and Relationship Handoffs
Adoption
- Consumption tracking (Automated vs. Manual)
- Portfolio Reviews, Technical Workshops, Upgrade Plans
- Success plan check-in – link back to business value & capture new opportunities
- NPS action planning
- Support Escalation
- Executive Briefing Events

Expansion/Upsell
- Opportunity identification – (Leverage Consumption Tracking)
  - Cross-Sell
  - Upsell
  - Services & Education
- Drive through system driven lead process
- Nurture Communications

Renewal
- Account health/portfolio review with renewal sales
- Business Value Statements
- Renewal Readiness Process
- Reference recruitment

Customer Success Adopt to Renewal

Adoption

Expansion/Upsell

Renewal

Customer Journey

High Touch
1:Few

Customer Journey

Pulse 2016
Customer Success Adopt to Renewal

Adoption
- Leverage Automated Consumption tracking and alerting to drive activity
- Playbook Driven Action Plans
- Success plan check-in
- NPS action planning
- Support Escalation Process

Upsell
- Opportunity identification – (Leverage Consumption Tracking)
  - Cross-sell
  - Upsell
  - Services & Education
- Drive through system driven lead process
- Nurture Communications

Renewal
- Account health score visibility and territory review with Sales
- Predictive Analytics
- Reference recruitment
- Customer Engagement Program

LEVERAGE THE POWER OF ALERTING AND AUTOMATION FOR SCALE AND IMPACT

Customer Journey Low Touch 1:Many
Achieving Synchronicity:
Nailing the Hand-off Between Sales, Services, CSM

THANKS!