Managing Complex, Multi-Product and Multi-Departmental Relationships
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HPE: Simplifying complex product offerings into complex organizations

**PROBLEM:** Complex Multi-Product, Multi-Suite Offerings

**Solution:** Prioritize based on ...
1. Revenue, Strategic, Importance
2. Engagement Scope (e.g. competitive threat, account needs attention, reference, value realization, etc)
# Customer Health Definition

<table>
<thead>
<tr>
<th>CRITERIA</th>
<th>GREEN</th>
<th>YELLOW</th>
<th>RED</th>
</tr>
</thead>
<tbody>
<tr>
<td>VERSION</td>
<td>N</td>
<td>N – 1</td>
<td>Version off support in 12 months</td>
</tr>
<tr>
<td>COMPETITIVE THREAT</td>
<td>N</td>
<td>Y, Considering</td>
<td>Yes, Competition engaged</td>
</tr>
<tr>
<td>DEGREE OF REFERENCE</td>
<td>Y, Active</td>
<td>Y, Not Active</td>
<td>Will not be a reference</td>
</tr>
<tr>
<td>CUSTOMER ORG</td>
<td>Stable</td>
<td>Changes, Impact Unknown</td>
<td>Changes directly impact</td>
</tr>
<tr>
<td>SUPPORT CASES</td>
<td>No Sev 1 or 2</td>
<td>1 case &gt; 2 months</td>
<td>Multiple open</td>
</tr>
<tr>
<td>ENHANCEMENT REQUESTS</td>
<td>Positive</td>
<td>Multiple ERs but not blocking</td>
<td>Multiple ERs blocking</td>
</tr>
<tr>
<td>USAGE/ ADOPTION</td>
<td>2 + Use cases</td>
<td>1 Use case</td>
<td>Shelfware; Struggling to adopt 1st use case</td>
</tr>
<tr>
<td>OVERALL</td>
<td>Zero RED, &lt; 2 YELLOW</td>
<td>Max 2 Red (None Blocking)</td>
<td>&gt;2 Red</td>
</tr>
</tbody>
</table>
How our org structure is set up to tackle complex relationships?

How we aim to be structured

- Ensure solid handoff
- Create more targeted renewals experience
- Highlight high-priority customers

How we are actually structured

- Post sales
  - Customer Success
  - Onboarding Success
  - Technical Success

Reduce implementation time

- Identify customer advocates better
- Give visibility into non-adopted features

Marketing

Services

Customer

Renewals

Support

Product
### Sales readiness flags risk during pre-sales at Gainsight

<table>
<thead>
<tr>
<th></th>
<th>Readiness</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Executive Owner</strong></td>
<td>VP Sales</td>
</tr>
<tr>
<td><strong>Definition</strong></td>
<td>Customer is not ready for Gainsight</td>
</tr>
<tr>
<td><strong>Scorecard</strong></td>
<td>No CTA</td>
</tr>
<tr>
<td></td>
<td>CTA exists:</td>
</tr>
<tr>
<td></td>
<td>- No GS Admin at purchase</td>
</tr>
<tr>
<td></td>
<td>- No Adoption Champion at purchase</td>
</tr>
<tr>
<td></td>
<td>- SFDC Professional Edition</td>
</tr>
<tr>
<td></td>
<td>CSM flagged the CTA because:</td>
</tr>
<tr>
<td></td>
<td>- Customer does not seem ready for onboarding</td>
</tr>
</tbody>
</table>
Three tips to support complex relationships – David Knox

1. Identify the quarterback
   - Identify the single point of contact responsible for the overall engagement
   - Develop rules of engagement and decision criteria to ensure everyone is on the same page
   - Empower the sub-teams to make decisions and move on behalf of the client

2. Map out the complexity
   - Things will get complicated
     - Ensure someone is tasked with mapping out the tangled web
     - Keep this web up to date to inform decision making

3. Develop Subject Matter Experts
   - You will not know all the answers
     - Empower someone on your team to become a subject matter expert
     - Bring these people in as needed
Three tips to support complex relationships – Mak Ghangurde

1. **Find a champion @ the customer**
   - Find or cultivate a champion within the customer who can help you navigate the customer’s complexity.
   - Schedule a meeting simply about organizational structure so you can be effective initially.
   - Position as a partnership to make deployment successful.
   - Beware that your intentions can sometimes be seen as “trying to sell more”.
   - Determine how to position as ‘win-win’ for the customer champion & build their credibility.

2. **Help champion deliver “CS” to their (internal) customers**
   - Help your initial customer deliver *customer success* to their own internal customers.
   - Understand how those downstream customers measure your champion, what they are depending on him for.
   - Build in some basic *customer success best practices* into your value delivery model.

3. **Don’t boil the ocean with your products and customers**
   - Prioritize your products based on your strategic objectives, and prioritize your various complex customer stakeholders based on engagement scope.
   - Not all products are equal. Not all customer organizations/personas are equal either.
   - Prioritize your products and prioritize your customers personas.
Three tips to support complex relationships – Jeff Johnson

1. Understand the org structure & customer uses
   - Imperative entire team (not just Sales) understanding the org chart, advocates and detractors, political landscape, etc.
   - Help your customers understand how they can best derive and maximize value and efficiency is a key value delivered by the CS organization.

2. Over-communicate
   - Ensure entire team adheres to a process for tracking activity (with tools like Salesforce and Gainsight).
   - Ensure regular and thorough communication methods for the overall activity in the account and health of the relationship.

3. Master the transition
   - CS should have as much knowledge as the pre-sales cycle and team.
   - Have a clear and prescriptive process for bringing in CS and ensure the entire team is on board with roles, responsibilities and goals.
Streamlining complex product offerings into complex organization

3) Prioritize Communication
   • Customer: based on engagement/interaction or “CTA”.
     - (e.g. broadening adoption of the tool; competitive displacement threat)
   • Customer: based on importance/influence
   • Products: based on revenue

2) Complex Customer Org
   - IT (deploy/install)
   - Purchasing
   - Executives
   - Line of Business user
   - Security team
   - Finance
   - Internal customer
   - Decision Maker
   - Initial Buyer
   - Other Departments

1) Complex Multi-product, Multi-Suite Offerings
   - Suite 1
   - Suite 2
   - P1
   - P2
   - Pn

4) Select the appropriate deliverable
   • Datasheet
   • Competitive overview
   • Etc.