Collaboration is Key to Success
Changing to culture in Sales and Success

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#Pulse2017
The Case for Customer Success

We Drive Adoption, Active Use, Growth and Renewal Across Portfolio

- Onboarding
- 90-day Early Life Management
- Life Cycle Management
- Strategic Relationships in Key Accounts
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Customers who participate in onboarding/training with Customer Success experience more growth in their first year.

- Higher use in early life
- Less loss
- More growth
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How much more growth?

Initial Worth

Onboarded: +18.03%
Not Onboarded: +13.09%

38% more growth
So what’s the problem?

Less than 25% of new Customers experience an onboarding session…

…leaving money on the table and potentially not delivering value to some customers.
CHALLENGE: GET MORE CUSTOMERS ONBOARDED!
BUSINESS CHALLENGE: Get More Customers Onboarded!

Root Cause Analysis showed Sales was not “selling” the value of Customer Success

- Sales was not incentivized to “sell” onboarding
- Sales was too busy to “sell” onboarding
- Sales did not trust Customer Success and tried to do it themselves, usually half-baked
- Sales did not know about the value of onboarding
- Customer Success spent too much time chasing down customers
SOLUTION:
PROVE VALUE,
INCENTIVIZE SALES,
TRACK PROGRESS

CHANGE THE CULTURE
### BUSINESS SOLUTION: Begin to shift the culture in sales

<table>
<thead>
<tr>
<th>Current State</th>
<th>Future State</th>
</tr>
</thead>
<tbody>
<tr>
<td>The company mindset:</td>
<td>The new company mindset:</td>
</tr>
<tr>
<td>The sales cycle is lead gen to signed contract delivered.</td>
<td>The sales cycle is lead gen to onboarding delivered.</td>
</tr>
</tbody>
</table>

- **Lead Gen**
- **Win!**
- **Onboarding**
- **Renew**

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# Business Solution: Begin to shift the culture and start with Sales.

## How did we solve?

<table>
<thead>
<tr>
<th>Problems</th>
<th>Solutions</th>
<th>Investment</th>
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</table>
| Sales did not know about the value of onboarding                         | Success World Tour                                                        | • Customer Success time  
• Travel Costs  
• Food and Beer budget                                                  |
| Sales was not incentivized to "sell" onboarding                         | Begin to make it part of the overall sale as a differentiator – work with marketing | • Marketing “real estate”  
• Small UX changes  
• Sales Learning and Development time                                   |
| Sales was too busy to "sell" onboarding                                 | Showed data, asked leadership for incentive budget                        | • Incentive funds                                                |
| Sales did not trust Customer Success and tried to do it themselves, usually half-baked | Customer Success onboards all new sales reps; leadership share a KPI    | • Customer Success time  
• Food and Beer budget                                                  |
| Customer Success spent too much time chasing down customers              | Implemented ScheduleOnce                                                  | • Cost of Tool  
• 25% of 1 employee’s time  
• Learning and Development time                                           |
Did it work?

YES! We saw over **100% increase** in % of customer experiencing an onboarding session!
Did it work?

Closing Thoughts

Q&A
THANK YOU