Happy 5 Year Pulse! Anniversary
Inside ‘Scream 2’
Who’s That Guy?

Lollapalooza?
H.O.R.D.E.
Fugeldaboudit!
The Woman Of The
LILITH
Tour And Now
Summer’s Hot Ticket
A always be closing
B
C
A attention interaction act
HELLO
I’m in
Customer Success
Looking back

Looking forward
Welcome!
Tamagotchi 9%
Crossfire 2%
Talkboy 8%
Super Soakers 9%
Skip Its 20%
Pogs 52%
Valley of Authenticity
Greetings from OAKLAND
Thank You Oakland!
U.S. Attendees
31 Countries!
31 Countries!
15+ Employees
Here Today
Thank you SuccessHacker!
Our Amazing Speakers
Our Amazing Speakers
Our Amazing Speakers
Our Amazing Speakers
Our Amazing Speakers
Our Amazing Speakers
Thank You Sponsors!
THANK YOU
For B2B companies, Customer Success is often the start of a broader journey in customer experience

…align CS goals with business strategy

…build end-to-end customer journeys

…instrument and incentivize end-to-end

…use CS to reinvent product

…use digital to streamline, personalize, and scale

…are predictive and prescriptive

Done right, the Customer Success function is the catalyst to for end-to-end, cross-functional transformation
## Insights on how to get value from CS—brand new research to be shared at 12:30 lunch and learn

### Where is the money in CS?
- **95%**
  - Strong link between integrated customer experience and financial value

- **20%**
  - Lift in retention, usage, CSAT

- **5+ pts**
  - Account impact > user impact

- **only 10%**
  - Blind spot on cost saving potential

### What does it take to execute?
- **2.5x**
  - Centralized accountability, governance drives big lift in value

- **<6-12 mos.**
  - More patience required: not enough time to see lagged impact

- **1st/2nd**
  - Onboarding, product experience hands-down the most important journeys

- **85%**
  - Need stronger KPIs and clear link-to-value
Allison Pickens Pickens
Tier customers intelligently
Hire 1-to-many lead
Hire CSM operations lead
Expand talent pool
Drive sales
Tier customers intelligently
Hire 1-to-many lead
Hire CSM operations lead
Expand talent pool
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Expand talent pool
Drive sales
Tier customers intelligently
Hire 1-to-many lead
Hire CSM operations lead
Expand talent pool
Drive sales
80.3% Yes
19.7% No
70.7% Yes
25.6% No
3.7% Don’t Know
Adoption ➔ Value
Demonstrate ROI
Drive new sales
Align around customers
CSM ➔ in downturn
Adoption ➔ Value
Demonstrate ROI
Drive new sales
Align around customers
CSM ➔ in downturn
Adoption ➔ Value
Demonstrate ROI
Drive new sales
Align around customers
CSM ➔ in downturn
Adoption ➞ Value
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CSM ➞ in downturn
Adoption ➔ Value
Demonstrate ROI
Drive new sales
Align around customers
CSM ➔ in downturn
 Adoption ➔ Value
Demonstrate ROI
Drive new sales
Align around customers
CSM ➔ in downturn
28% No
72% Yes
59.8% Yes

37.8% No

2.4% Don’t Know
You’ve Made Great Progress
But Let’s Get Real… Real…
Welcome to the Customer Success Network
Trend 1

Company-Wide CS Network
Trend 1: Company-Wide CS Network

Lonely CSM
Trend 1: Company-Wide CS Network

Customer

- Sales
- Product
- Finance
- Support
- Happy CSM
- Services
Demonstrate ROI to a Customer

Lead for Renewal
This customer is prime to be renewed

Lead for Expansion
This customer will be amenable to get even more value from their partnership with you

Lead for New Logo
This customer will be happy to speak to a prospective customer about the value they’ve achieved

A successful customer creates at least 3 new leads
Trend 1: Company-Wide CS Network

Opportunity

Lead

New Business

Demonstrate ROI

Leads are the start and end of the Pipe
Trend 1: Company-Wide CS Network

Revenue Growth in the Helix
Today, strong revenue growth doesn’t come from a straight-and-narrow Pipe.
It comes from the Helix.
Trend 1: Company-Wide CS Network

CEO

- Product Engineering
- Marketing
- Sales
- Customer
Trend 1: Company-Wide CS Network

- **Reactive**
  - Avg. Gross Retention %: 86
  - Avg. Expansion Rate %: 13
  - Avg. net retention: 13

- **Informed**
  - Avg. Gross Retention %: 89
  - Avg. Expansion Rate %: 13
  - Avg. net retention: 89

- **Proactive**
  - Avg. Gross Retention %: 89
  - Avg. Expansion Rate %: 16
  - Avg. net retention: 89

- **Predictive**
  - Avg. Gross Retention %: 95
  - Avg. Expansion Rate %: 22
  - Avg. net retention: 22

Avg. Gross Retention % and Avg. Expansion Rate % are shown for each category.
Trend 1: Company-Wide CS Network
Trend 2

Customers As Part of CS Network
Trend 2: Customers As Part of CS Network
Trend 2: Customers As Part of CS Network

Company

Sales
Product
Finance

Customer

Happy CSM
Support
Services

Customer

Company

Customer
Trend 2: Customers As Part of CS Network

\[(CS = CO + CX)\]

Customer Success
Trend 2: Customers As Part of CS Network

\[ (CS = CO + CX) \]

Customer Success = Customer Outcomes + Customer Experience
Trend 2: Customers As Part of CS Network
Trend 2: Customers As Part of CS Network

Tech Go-to-Market: Make Customer Success a Cornerstone of Your Customer Experience Strategy

Customer Success Management Is The Key To Outstanding B2B Customer Experiences
CX Leaders Must Embrace Customer Success Management To Ensure Customer Loyalty
Trend 2: Customers As Part of CS Network

“It's not a good customer experience if the customer isn't successful”

Wednesday, May 10th at 11:15 AM
Trend 2: Customers As Part of CS Network

How We Drive Advocacy at Gainsight
Trend 3

IT Architecting

CS Network
Trend 3: IT Architecting CS Network

- Data
- Process Design
- Upgrades/Iteration
- Testing
- Change Mgmt
- Scale

IT

Company

Customers

- Happy CSM
- Sales
- Product
- Finance
- Support
- Services
Trend 3: IT Architecting CS Network
Trend 3: IT Architecting CS Network
Trend 3: IT Architecting CS Network

Why Customer Success teams should partner with their IT counterparts
Trend 4

Network Expanding to Real World
Trend 4: Network Expanding to Real World

IT

Data
Process Design
Upgrades/Iteration
Testing
Change Mgmt
Scale

Company

Software
Financial Services
On Premise
Publishing/Media
Health Care
Industrials

Customers

Support
Services
Happy CSM
Finance
Product
Sales
Customer
Customer Success Management
A third new organizational unit, which has an analogue in the software industry, is responsible for managing the customer experience and ensuring customers get the most from the product.
Trend 4: Network Expanding to Real World

Customer Success in the Fight Against Cancer and World Hunger
John Liebig
Illumina
10:30–10:50 AM

Scaling Customer Success for (Literally) Millions of Subscribers
Manish Goyal
Sprint
Richelle Deveau
Accenture (Moderator)
11:10–11:35 AM

Customer Success in the Age of Digital Industrial
Niloy Sanyal
GE Digital
11:35–12:00 PM
Trend 4: Network Expanding to Real World

Beyond Tech Breakout Track
The Winslow’s Room
12:15 PM – 4:20 PM
McKesson
Agfa Healthcare
ADP
GE Oil and Gas
Verizon

No Usage Data Track (Wednesday)
Blanche’s Lanai Room
10:30 AM – 3:05 PM
Sailpoint
Longboard Asset Management
PTC
Alfresco
Cloudera
Trend 4: Network Expanding to Real World

Customer Success without usage data: SaaS’ dirty little secret
Trend 5
Partners Scaling
CS Network
Trend 5: Partners Scaling CS Network
Trend 5: Partners Scaling CS Network

Ecosystem
- Outcomes
- 360-Degree View
- Customer Health Metrics
- Prescribed Playbooks

Aligned around customer’s success
Trend 5: Partners Scaling CS Network
Trend 5: Partners Scaling CS Network

Aligning with Partners On Customer Success
Trend 6
Community Around CS Network
Trend 6: Community Around CS Network
Trend 6: Community Around CS Network
Trend 6: Community Around CS Network

Golden Rule
Trend 6: Community Around CS Network

Golden Rule
Success for All
Trend 6: Community Around CS Network

Golden Rule
Success for All
Child-like Joy
Trend 6: Community Around CS Network

Golden Rule
Success for All
Child-like Joy
Shoshin
Trend 6: Community Around CS Network

Golden Rule
Success for All
Child-like Joy
Shoshin
Stay Thirsty, My Friends!
Trend 6: Community Around CS Network
Pulse ’17 Trends: Customer Success Network

1. Involve Your Whole Company
Pulse ’17 Trends: Customer Success Network

1. Involve Your Whole Company
2. Include Your Customers
Pulse ’17 Trends: Customer Success Network

1. Involve Your Whole Company
2. Include Your Customers
3. Partner With IT
1. Involve Your Whole Company
2. Include Your Customers
3. Partner With IT
4. Extend To The Real World
Pulse ’17 Trends: Customer Success Network

1. Involve Your Whole Company
2. Include Your Customers
3. Partner With IT
4. Extend To The Real World
5. Scale Through Your Partners
Pulse ’17 Trends: Customer Success Network

1. Involve Your Whole Company
2. Include Your Customers
3. Partner With IT
4. Extend To The Real World
5. Scale Through Your Partners
6. Invest In Your Community
Jennifer Lopez
Matthew McConaughey

The Wedding Planner

A romantic comedy about love, destiny and other events you just can’t plan for.

“The Best Date Movie of the Year!”
—Casey Waller, MTV Radio
Key Feedback: Themes from Last Year NPS

**Venue**
Excited to be back in Oakland.
Good ideas on scale and room capacity planning

**Childlike Joy**
True to our brand

**Big Investments**
Better Wi-Fi, coffee and snacks, lunch efficiency, parties

**Staff Training**
More planning with hired staff to incorporate our values

**Agenda Planning**
Better navigation, uniform session length, consistency in web and mobile

**Day Three**
Complete reinvention.
Won’t be a binary choice
Hi Scott,

Can’t wait to see you at Pulse next week! This is our fifth year doing the event and we have some special surprises up our sleeve.

But the best part of Pulse is always the same every year—you! Seriously, our attendees and the network and community they build are what makes Pulse special. Thanks in advance for making Pulse happen.

On that note, I know each person comes to Pulse with different goals and expectations. That’s why I wanted to send you this email.

How can we make your Pulse experience magical this year?

Let me know. I’m 100% serious about this offer.

Just reply back to this email with any questions or requests you have and we’ll do our best to see if we can help. I can’t promise we can meet every need, but we will definitely try.

Examples could include:

- “I want to meet another company like me—any recommendations?” (High touch? Tech touch? Or premium? Healthcare?)
- “Which sessions should I check out given my specific interests and situation?”
- “I like hands-on sessions versus presentations—where should I go?”
- “I want to know a great bar to network at after hours.”
- “I have dietary restrictions—please help!”
- “I want to stay as far away as possible from any Nick Mehta karaoke—any guidance?”

As of this moment, I am officially on call for Pulse (as is our entire team).

See you at Pulse next week. And between now and then, let me know how we can make this the best Pulse yet!

Nick

P.S. In case you’re wondering, this is really from me. While we automate the sending of this message, I read every single response and engage my team personally to make sure we make your experience great. Last year, I received more than 350 replies to this note.
Focus this Year: Depth and Variety

Unplugged

Hands-on workshops for networking
We picked the companies, not the topics.
Day 1 Keynotes

Morning
Gretchen Rubin
Author
Illumina, Concur, Sprint, Accenture, GE

Afternoon
Keith Krach
DocuSign
TSIA, Cloudera
Stick Around Until Closing Keynote and

Win Tickets to Hamilton SF
Day 2 Keynotes

Morning
Katie Hingle
Adobe
Cisco, VMware, Deloitte, Bessemer Venture Partners

Afternoon
Aaron Levie
Box
IBM, Marketo, CXO Jeopardy with Box, Cisco, Salesforce, Cornerstone, OnDemand
Day 3 Keynotes

Morning
Karl Rumelhart
Gainsight
CSM Skill Building, Gainsight (GS) Customer Summit, Getting Ready for GS, Partner Case Study Theater

Afternoon
Tracy Young
PlanGrid
Sequoia Capital, LinkedIn, Clever, ServiceRocket
Time to Slime
<table>
<thead>
<tr>
<th>Tracks</th>
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<tbody>
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<td>Circles of Success*    (Gainsight Clients Only)</td>
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## Tracks

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Day 1:
Evening
Bar Crawl
Day 2:
Evening
USS Hornet
Check List

- Download “Pulse 2017” App
- Tweet to #Pulse2017
- Slides at bit.ly/PulseSlides
- Look for the “90210” Shirts
- If you need ANYTHING:
  Call or Text (865) 465-5281
  Tweet to #PulseHelp
Fist Bump
One More Thing…
Life is too short
Why so cynical?
VACANT
In closing...
The Desiderata of Happiness

A collection of philosophical poems by Max Ehrmann, author of Desiderata

Illustrated by Stephen Schutz
Be yourself
Especially, do not feign affection. Neither be cynical about love;
For in the face of all aridity and disenchantment, it is as perennial as the grass.
You are a child of the universe, no less than the trees and the stars;
You have a right to be here.
And whether or not it is clear to you, have no doubt the universe is unfolding as it should.
With all its sham, drudgery, and broken dreams, it is still a beautiful world.
Be cheerful.

Strive to be happy.
WE’LL BE THERE FOR YOU