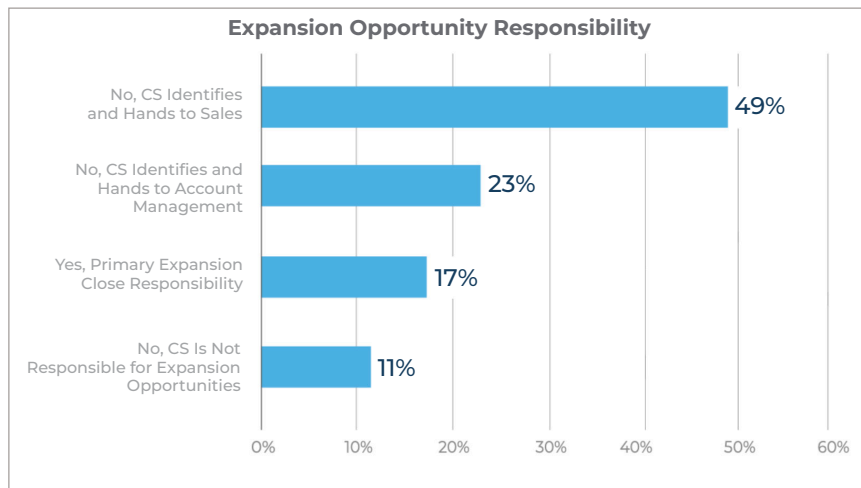


# Integrating Customer Success Into Expansion and Renewal

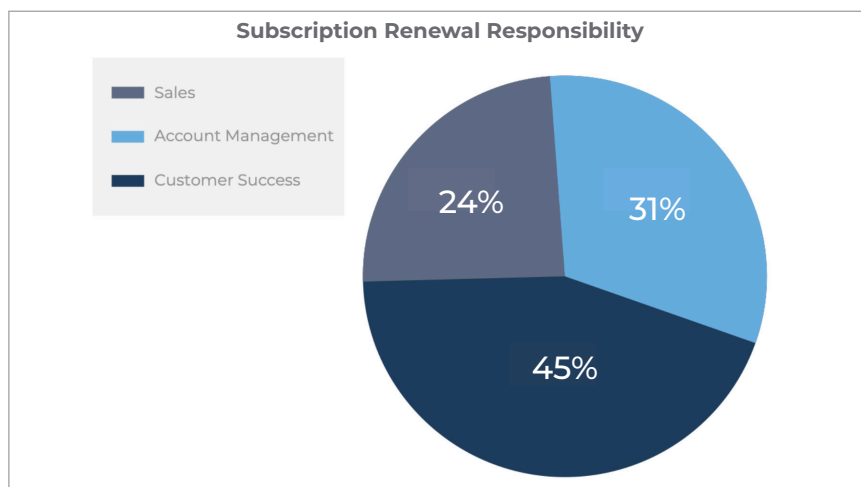


According to findings in the recently published Customer Success Index from Gainsight and RevOps Squared, customer success is often underutilized when trying to capture renewal and expansion opportunities. The Index found that Customer Success teams are responsible for renewals in just 45% of companies. Customer Success is responsible for closing expansion opportunities in just 17% of companies, though they help identify opportunities in 72% of companies.



Source: Customer Success Index 2022, March 2022.

These results indicate that for many companies, there is untapped potential for Customer Success to help efforts to expand and renew existing customers. And in some cases, Sales teams and others are trying to do it on their own—without taking advantage of Customer Success' deep customer expertise, which could help them get over the finish line.



Source: Customer Success Index 2022, March 2022.

## Methodology

Gainsight, in partnership with RevOps Squared, conducted research throughout November and December 2021 to benchmark Customer Success organizational structure, customer retention process measurements, and performance metrics as well as including NPS, Gross Dollar, and Net Dollar Retention rates.

Over 350 companies participated in the research across a wide range of company sizes, annual contract values, industry segments, and geographic locations. Participants included every level of management, including C-level executives, Senior Vice Presidents, Vice Presidents, and Directors, both in and outside of the CS department.



**“Even if Customer Success isn’t directly involved in closing expansion opportunities, the teams play a big part in identifying and setting these opportunities in motion. Expansion isn’t sold, it’s earned—in large part by the work of CS teams.”**

**Kellie Capote**

Chief Customer Officer, Gainsight

## 6 Steps to Help Customer Success Take the Lead

### 1. Create a single source of truth

Most organizations are saddled with a disparate data set from sources like CRM, Customer Support, Finance/Billing, Marketing, Product teams—the list goes on and on. Consolidating data into one platform not only gets the entire organization on the same page, but it also enables Customer Success to direct renewal and expansion efforts much more effectively.

### 2. Improve collaboration among teams

Once everyone is working off the same set of data, Customer Success can start to build collaboration and determine roles and responsibilities among critical players like Sales, Marketing, and Product. The exact mix will vary depending on the company and the customer, but once teamwork is established the right solution will become evident.

### 3. Drive retention proactively

Though retention is often considered a table stakes, defensive approach for Customer Success, well-integrated organizations actually employ a proactive strategy that uses data to identify at-risk customers, then mobilizes the entire organization (led by CS!) to take action. To achieve scale, consistent efforts guided by best practice playbooks are essential.

### 4. Build integrated customer journeys

Customer journeys, developed by Customer Success, provide a high-level view of both renewal and expansion milestones. Customer Success can lead by creating a blended approach of high-touch and digital outreach for critical points in the journey. In-app engagements, automated triggers, and auto-generated emails enable Customer Success to direct traffic at scale.

### 5. Personalize outreach at scale

Building on the customer journey, Customer Success teams can create customized outreach plans for each customer or customer type, based on precise data. These personalized, dynamic plans avoid the trap of one-size-fits-all approaches while minimizing resource utilization via digital tools. Low-touch outreach could include automating actions during onboarding, renewals, surveys, and more.

### 6. Optimize expansion plays

Once Customer Success has built the capabilities to proactively evaluate, track, and guide customers, they can take the lead in capitalizing on expansion opportunities. The team will show value in two ways: by generating a new pipeline of Customer Success Qualified Leads (CSQLs) for the organization; and demonstrating to customers how the company is helping them succeed.



**Dive Deeper Into the Customer Success Index 2022. Visit [Gainsight.com](https://gainsight.com)**