WNDYR

Gainsight



THE EVOLUTION OF CUSTOMER SUCCESS

Customer Success lessons and insights from the world's leading CS organizations

HELLO AND WELCOME!

Welcome to this white paper on Customer Success. If you are part of the growing Customer Success (CS) revolution, you may have seen many other white papers on this topic.

What makes this white paper unique is:

- It focuses on the current CS activities of companies while exploring how they got there
- It demonstrates how the role and evolution of CS at various companies has impacted their businesses
- It examines the approaches companies have adopted a "Customer First" approach in their customer relationships
- This white paper is not about who we are and what we do. Its main concern is with the leaders in the industry and how their approach and success can inform and teach other leaders embarking on their CS journey

In other words, our white paper is distinct because it presents a structured strategy that allows teams to start small and evolve their efforts into a sophisticated CS approach.

At **WNDYR,** we understand the future of work and believe it lies in accelerating humans. Thus, the companies we chose for this study show a focus on the end-user, the human. As one of the first companies that placed an emphasis on customer success in our business, it was natural for us to partner with the leader in the CS revolution, **Gainsight.** It brings me immense pleasure and pride in having them as collaborators for this white-paper.

We'd love to hear your feedback and hear the benefits our insights have provided you. We would also love to hear how your organization has matured through the initiatives driven by its CS function.

Happy reading!

With kind regards,
Prasoon Ranjan
WNDYR Vice President of Customer Success

> "OUR FOCUS IS NOT SO MUCH ON THE SOFTWARE BUT ON THE HUMANS USING IT"

INDEX

Our approaches
Where we introduce WNDYR and Gainsight's credentials

The Evolution of Customer Success
Where we unpack how CS started and introduce different CS maturity stages

Stage 1: Insights and Actions
Where we explore common challenges in this CS maturity stage

Interview: Rob Morris, MediaValet
Case Study: Samanage

Leveling Up: Outcomes
Where we explore challenges of growth stage CS organizations

Interview: Michael Redbord, HubSpot
Case Study: Glassdoor

Reaching the Peak: Transformation
Where we explore challenges of enterprise grade CS organizations

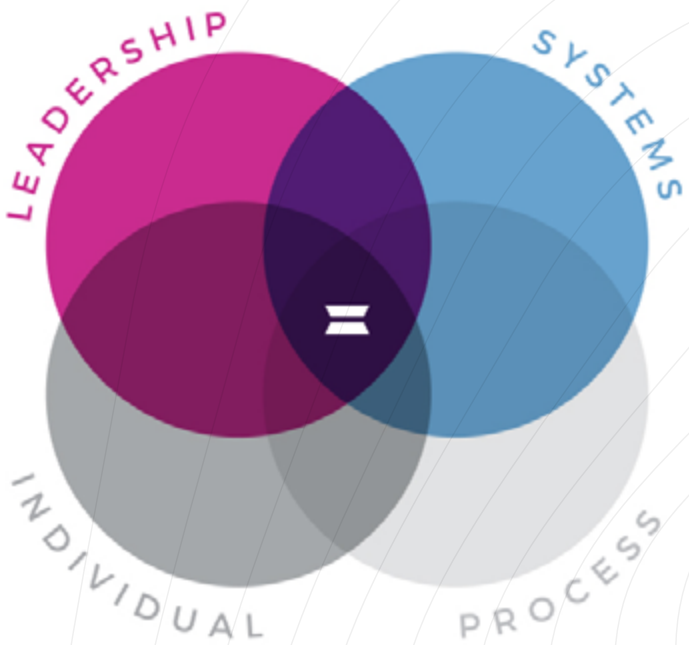
Interview: Eva Klein, HubSpot
Case Study: Adobe

Conclusion
Where we review what we've learned

OUR APPROACHES

WNDYR - FOCUSED ON CUSTOMER SUCCESS SERVICE DELIVERY

Activating a Customer Success journey can be incredibly complex which makes finding a reliable SaaS implementation partner a crucial priority. With **nearly 4 000 customer engagements** under our belt, the WNDYR team has the necessary experience in identifying customer insights, driving adoption and expansion while aligning stakeholders and planning for success - ensuring holistic transformation of your business.



With teams struggling to solve their organizational CS challenges, as several interviews in this white paper reveal, teams need a practical and effective system to identify and resolve their blockages. WNDYR have achieved everything they've been able to do by using the Thinking Framework formula for successful change.

That is to say, any successful organization need a unified interplay between strategic leadership, well designed processes built into systems that enable these process along with enabled individuals who experience and become a part of the change itself.

GAINSIGHT'S PERIODIC TABLE OF ELEMENTS OF CUSTOMER SUCCESS

Managing customers in a unified way is incredibly complex - no single department, function, or organization encompasses every touch-point with the customer base from the initial sales cycle through implementation, onboarding, renewal, expansion, advocacy, and beyond.

The complexity can be daunting: no other team will juggle as many disparate goals, skill sets, and processes, indefinitely over the course of the customer's lifetime.



It's critical to have a structured framework and platform to make sense of that complexity to ensure that things are done the right way. Over the course of 500 implementations, we've observed and codified an evidence-based, prescriptive model that can be mapped onto any recurring-revenue business in any industry called the **Periodic Table of Elements of Customer Success** or **Elements** for short.

These Elements not only simplify and focus your customer-facing strategy, but empower teams with the tools to enact that strategy to achieve proven results.

WNDYR and Gainsight present:

THE EVOLUTION OF CUSTOMER SUCCESS



Before Customer Success, on-premise software was the norm, it was general practice to lock customers into long-term contracts, and because of this, customer service wasn't always a priority. Once a customer signed their contract, where were they going to go? They were stuck with you, no matter how unsuccessful they were with your product or bad your customer support was. Sales culture reigned as new deals were the main source of revenue for these legacy businesses. If a customer did want to churn, it was such a financial burden to do so, it was practically impossible. Then, digital transformation emerged and changed the way businesses thought about customer retention. As you will see in our MediaValet Case Study, CS is a must for customer retention.

The digital transformation marked a shift from on-premise to subscription-based software solutions. Every day, new Software-as-a-Service (SaaS) solutions were added to the market so much so that supply began to outweigh demand. We had entered an age of the customer. Annual and monthly contracts made it easier to churn and businesses had a bevy of options to choose from. Subscription businesses had no choice but to continuously deliver value or customers would end their contract and take their money elsewhere. Thus began the practice of Customer Success.

While relatively new compared to areas like Marketing or Sales, CS emphasizes the proactive delivery of outcomes and an excellent customer experience. Although its roots lie in recurring-revenue business, a ripple effect is happening. Well-established, on-premise companies with legacy solutions, and even non-tech or non-subscription businesses, are starting to see the money-saving and revenue-driving effects of CS.

While a company may have sophisticated customer-facing organizations like Support, Professional Services, and Account Management, it doesn't necessarily mean they're carrying out Customer Success. Customer Success is not the job of one person or department, **it's a company-wide initiative.** In order to deliver value you'll need cross-functional processes tied to widely-distributed data that follow the customer journey end-to-end.

> "TO TRULY DELIVER VALUE, WE NEED TO FOLLOW THE CUSTOMER JOURNEY END-TO-END"

THE EVOLUTION OF CUSTOMER SUCCESS

Improving the maturity of your company's Customer Success processes, people, and technology will result in significant and predictable boosts to business growth. There's more to Customer Success than producing happy customers.

When done correctly, Customer Success will drive both internal and external success. If you can consistently deliver value and prove the impact that your solution has made, customers will expand and continue to renew.

CUSTOMER SUCCESS OPERATIONAL MATURITY STAGES

To assess the maturity of organizations CS activities, we'll be leaning on Gainsight's four-stage maturity model to identify and unpack each stage:



STAGE 1: REACTIVE

Many companies start in the Reactive stage, tackling risks as they come.



STAGE 2: INSIGHTS & ACTIONS

Organizations who have evolved beyond pure reactivity have taken the first step towards true Customer Success. Companies in the Insights & Actions stage of maturity don't just gather data, they act on it.



STAGE 3: OUTCOMES

In this phase, companies have built a structured life-cycle for every customer segment, and have the right processes in place to advance customers along that life-cycle toward a renewal or expansion event–and beyond.



STAGE 4: TRANSFORMATION

The Transformation stage means fully-optimized, company-wide adoption of Customer Success as a core principle for every customer-facing department. From Sales to Marketing to Support to Services to Product, every employee has personal and team goals designed to make sure customers are successful.

For the purposes of this eBook, we've chosen to omit the first Reactive stage and to focus on unpacking the learnings organizations can activate at the Insights & Actions, Outcomes and Transformation levels. **Let's dive in!**

INSIGHTS & ACTIONS

Challenges of Early-Stage Customer Success

Despite all the odds, you've made it and your business has started to experience success. As your business grows, you'll likely be wearing a lot of hats and you'll be asked to work outside of your comfort zone on most days. It's also likely that soon you'll realize that adding a Customer Success strategy will turbo-charge your ability to retain customers and grow your income; the question is - where to start?

When considering Customer Success, one should also be aware of the changes that will inevitably accompany this. The one crucial area of change that is frequently overlooked is that of employees. At WNDYR and Gainsight, we've often seen initial underinvestment into preparing and assisting teams during and after the adoption of a customer success strategy. The irony is that this, often overlooked element, lies at the root of most issues that can be remedied with successful change management consultation, which we will address later. The more mature you get, the more you'll be able to specialize, but until then, there are two imperatives:

Procure Insight: Understand your customers on a deeper level. What defines a positive outcome? What will it take to achieve that? What are the signs of success or failure?

Take Action: Do something to help your customers achieve those desires outcomes. As you gain more insight, your actions will improve.

While it sounds simple, here are 7 common challenges that frequently test emerging teams and their strategies:

1 LOW CUSTOMER COUNT

As a scientific principle, when you have a smaller sample size, the information you uncover will be less significant than if you were to have a very large body to study. The same is true of the insights you'll gather from a smaller book of business. If a customer has a specific pain point with your product or is running into an obstacle during onboarding, is that representative of the overall customer experience? Or a one-off outlier?

2 YOUR PRODUCT LACKS MATURITY

Your customer success efforts will always be intrinsically tied to your product efforts. If customer success is filling gaps in the product, you won't be able to maximize your time on relationship-deepening activities, like building success plans or setting goals. You'll be

responding to complaints and feature requests. Early-stage companies often have immature products, and as such, you'll be forced to balance your time between growth action and filling product gaps.

3 CUSTOMER SUCCESS IS REACTIVE

The biggest difference between a 20th-century "customer service" approach and a modern customer success mentality is that customer success is proactive whereas customer service is reactive. Being able to anticipate and resolve challenges to your customers achieving their desired outcomes is critical to customer success, however, in the early-stages, you'll still find yourself reacting until you operationalize outcomes.

4 BEING CLOSED-MINDED

With new systems, come new ways of approaching and doing work and quite often, we tend to get stuck in old or outdated ways of getting work done. So while change can feel daunting, it can help teams to remember that these new ways of working are there to support your organization and gain insights into what your customers' truly need. It truly is a shift in thinking about the *why* of the work process, not the *how*. By focusing on *why* the change is important and taking place, the *how* of making use of the tools will fall into place.

5 PROCESSES ARE MANUAL

Does anyone love filling in spreadsheets? Until you can automate and scale your processes, you will have to do some manual work. That includes sending one-to-one emails, tracking progress in spreadsheets, setting calendar alerts for important milestones like 30-days from renewal, and more. We recommends using WNDYR's *Thinking Framework* to help you refine your systems and processes.

6 A LACK OF PLAY-BOOKS

When do you start the renewal conversation? At what point do you schedule an Executive Business Review (EBR) and who should attend? What will be included in the review? How do you escalate an at-risk customer situation? In the early-stages, you'll still be working out what your best practices are and will be working to solve them ad hoc. Again, unpacking the way planning is done through WNDYR's *Thinking Framework lens of* the systems/process offers a practical way of tracking and recording solutions.

7 NOT IDENTIFYING BLOCKAGES SUCCESSFULLY

If yourself or your team struggle to stick to the scheduled time to review your customer's need, are unable to complete tasks or feeling that you cannot adequately communicate with your team or clients, you most likely have blockages.

It's critically important to take the time to review what these blockages might be. Is it lack of time management? Or not being able to prioritize task? Think of ways that can solve these blockages and then discuss them with your team. Once again, using WNDYR's *Thinking Framework* to review your organization approach to systems/process, individual and leadership solutions will reveal both the shortcomings and potential solutions to your blockages.

How to pilot a Customer Success program

1 CREATE A 360-DEGREE VIEW OF THE CUSTOMER

The difference between good Customer Success plan and great Customer Success plan lies in your *ability to be adaptable* and come up with *solutions that meet the client's needs*, even if the needs are not apparent at first. To help you better understand what needs to be implemented, the first step is to gain insight into your customers. We call it generating a **"360-degree view"** of the customer. In other words, it just means collecting all of the signals your customer is sending you into a single source of truth. After all, any one piece of customer feedback could have significance or not, but viewed together, you can start to understand the whole context of what your customer needs to be successful.

There are two types of customer data you'll need to gather into your 360-degree view: Quantitative and Qualitative.

Quantitative data is objective, numerical feedback about what your customer is doing and what they are achieving. This can include usage data about the product, like page views, logins, feature usage, etc. It can also include adoption data, like how many end users are actively using the product and how deeply they're using it. It can include ROI metrics, like the time-saving or dollars of revenue generated. Your quantitative data should also include basic items like the customer's contract value and their renewal date.

Qualitative data is no less valuable than quantitative data. It includes things like NPS, survey data, customer satisfaction (CSAT) scores, and even subjective, manual input from a customer success manager (CSM) on their insight into the customer's health. You will need both quantitative and qualitative data to get a comprehensive perspective on the customer.

2 LIFE-CYCLE MANAGEMENT

Many companies intuitively map this journey *from the inside out*. In other words, they think about their *company's journey with the customer instead of the other way around*. Best-practice life-cycle management is all about **mapping the customer journey from the customer's point of view.** Instead of thinking about what success means for you, you have to think about what *success means for the customer at each milestone*. Below are several milestones for you to consider:

PURCHASE:
The moment the customer decides to buy your product or service

IMPLEMENTATION:
The period of time it takes to bring your product or service online

ONBOARDING:
Teaching your customers to use and thrive with your product (preferably alongside the services of an onboarding consultancy like WNDYR that delivers empowered users)

FIRST VALUE:
A critical moment where your customer achieves the first tangible return on their investment

ADOPTION:
Your customer continues to grow and deepen use of your product or service

DESIRED OUTCOME ACHIEVED:
Your customer's original goal when they chose your company has been accomplished

EXPANSION:
What's the next goal or outcome? Your company should be able to grow alongside your customer as they expand their relationship

RENEWAL:
If you've driven success at each stage, this should be automatic!

Critically, this journey mapping process isn't something you do for your customers, it's something you do with them. Although it can seem time consuming, it is a vital step to ensuring your Customer Success strategy.

3 OUTCOMES HEALTH

What does it mean to be "healthy?" With a person, it could mean a lot of things—regular exercise, a balanced diet, no major health risks. But how much exercise? How much junk food is okay? It's different for each person, and likewise, it's different for every company. It may even vary inside a company from customer to customer.

That said, it's important to become prescriptive to customers as you learn more and more about what habits and practices drive positive outcomes with your customer base in general. In that way, Outcomes Health is always going to be an iterative process—but it's doubly so at early-stage companies. The important thing isn't to roll out a perfect health framework from day one, but to get started with something on day one.

This framework is called a **health score.** For most companies, it's a number from 0-100, and it's even further generalized using a color-coded scoring system. For example, 80-100 is green, 60-79 is yellow, and below 59 could be red. It may be more or less granular depending on what's meaningful for driving the right action at the right time. Some companies include orange and lime green on their health scores, but it's not generally helpful to subdivide smaller than that. Mathematically, the difference between green and yellow might only be one point, and creating more and more categories of health increases the risk of overreacting to minor changes.

Here are several factors worth tracking that form part of typical health score:

- Overall usage of the product
- Length of time as a customer
- NPS score
- Number of open support tickets
- Community participation and advocacy

4 EXPERIENCE HEALTH

Driving positive outcomes is just one half of the customer success equation. It takes a great customer experience (CX) to truly create successful customers. You might be delivering on your promise to your customers in terms of ROI, but if they don't have a good CX interacting with your company, they'll feel trapped. They won't renew or expand. On the other hand, customers who have a great CX but don't achieve their desired outcomes will often churn without warning - we recommend three steps to a best-in-class CX strategy:

CX HEALTH STRATEGY



Listen

Most people think of surveys when they think CX. If you want to know what your customers are thinking, **you need to ask them!** Ask for feedback concerning important milestones in the customer's life cycle so you can get specific answers about specific processes. Other surveys should be *spaced out to prevent survey fatigue*.

Act

You'd be surprised how many companies and teams routinely ask for customer feedback *without having a plan in place to do anything about it*. Research shows the effects of surveying and not acting are so harmful to CX, it would be better to not even survey at all! You should **never ask a question you don't intend on taking action to solve**–and crucially, close the loop by telling the customer what you've done to address their feedback. That means having a plan in place for acting based on feedback!

Analyze

Lastly, to take your CX data and aggregate it to benchmark the findings against your larger business goals. Is your overall NPS improving quarter-over-quarter? Is your CSAT correlating with advocacy and new pipeline? How have your actions impacted CX? If they've been successful, it's time to reincorporate them into your operations. If they haven't, it's time to try something else.

HOW YOUR ORGANIZATIONAL STRUCTURE WILL CHANGE

In early-stage companies or customer success pilot programs, your organizational structure will need to be flexible.

Your CS leader may even have a personal portfolio of customers. They'll move from onboarding to EBR, from success planning to building and analyzing surveys. This will take deep cross-functional alignment–most critically with Sales, Product, and Support. Often, CSMs will need to be highly technical and highly personable, and each one will wear several hats. As you scale, you'll be able to become more specialized, but until then, you'll have fun moving quickly and responsively.

You may think every hire needs to be able to "do it all," but really it's your team that needs to do it all. **Hire people that compensate for your weaknesses.**

So let's dive in and check out our first set of practical examples that unpack some of these points on the following pages!

> "PRO TIP: STAY FLEXIBLE AND HIRE PEOPLE THAT COMPENSATE FOR YOUR WEAKNESSES"

CS INTERVIEW



mediavalet

Rob Morris

Rob Morris is the Director of Customer Success MediaValet Inc, which provides companies of all sizes and industries with accessible, secure and easy-to-use DAM solutions. Rob's role at MediaValet Inc. is fostering a company-wide culture of Customer Success and providing lifetime value for their clients through higher product adoption, customer satisfaction and overall health scores, positioning MediaValet as a global leader in SAAS Customer Service.

Prior to joining MediaValet Inc., Rob managed large-scale customer IT projects and IT teams for 15 years, including at IBM and Contac.

MATURITY STAGE BEFORE
Reactive

MATURITY STAGE AFTER
Insights & Actions

MEDIAVALET'S CHALLENGE

Needing to maintain close customer relationships as the number and size of MediaValet's customers rapidly scaled,

MEDIAVALET'S SOLUTION

- Continual processes review while acting on early customer insights in order to address any gaps - MediaValet also engaged their customers by providing them with insightful usage data
- New hires were recruited via referral and were "fit" led to ensure a harmonious team

THE RESULTS ACHIEVED

- 20% to 25% reduction in Onboarding time with effective retention strategies leading to an industry leading low churn rate
- MediaValet drove more structure in their CS team with clear role definitions resulting in a culture of customer intimacy

> "OUR GROWTH WAS DOWN TO A KEY FACTOR - PRIORITIZING THE CS FUNCTION FROM DAY ONE OF THE COMPANY"

CAN YOU TELL US ABOUT HOW YOUR TEAM LAY ITS FOUNDATIONS FOR CS INSIDE YOUR ORGANIZATION?

For our team, Customer Success grew organically. MediaValet started as a close knit team of five people and with everyone bringing a Jack-of-all-Trades skill set, our initial CS activity dealt with introducing basic processes around support. For example, we introduced a ticketing system which enabled us to respond to customer's requests. In responding to customers, however, we eventually realized a big gap we missed; the onboarding process for our customers!

Subsequently, we became aware that we were not keeping in touch as much as we should have with our customers - our only communication would happen when doing renewals and as a result, we started to see some churn.

As a result, we realized that we needed to develop a more engaging CS strategy. We decided to do this on a "per need" basis. Interestingly, as we started putting down some basic processes in place, like regular touch points with customers, standardized onboarding or basic metrics around account health, we saw results which snowballed into larger discussion with the executive level. Our team have always been customer-led, so in our instance, our CS efforts has naturally evolved over time with no push-back from our leadership.

HOW HAS IT HELPED THE CS TEAM TO BE SUCH AN EARLY TEAM IN YOUR ORGANIZATION'S GROWTH?

Our organizational growth was down to a key factor - prioritizing the CS function from day one of the company. In doing so, our team was able to ensure that our customer sat right in the middle of the organization while CS served as the bridge between the sales and the development team.

Today, the CS team work hand in hand with our product development teams and run metrics on usage and features that customers need. We have the largest voice in terms of guiding product development as well as in feature prioritization. Certainly, it speaks to the buy in of the executive team as CS has shown it's value from the start.

samanage

CASE STUDY

THE CHALLENGE

Struggling to Manage Customer Churn

Samanage adopted Gainsight in 2014 to better understand their customers' health. When Ryan van Biljon, VP of Sales and Services, assumed responsibility for customer success, he learned the team felt Gainsight was a helpful tool but they weren't getting what they needed from it–the ability to manage churn.

Van Biljon saw the value in Gainsight and the fact that his team was already bought in, but the CEO needed him to prove it using data.

SOLUTION: HARNESSING THE EXPERTISE OF GAINSIGHT PROFESSIONAL SERVICES

Van Biljon engaged Gainsight Professional Services for guidance and assistance deploying the Gainsight platform to serve Samange's needs. Knowing that van Biljon's main focus was reducing churn, Gainsight Professional Services configured the platform so the customer success team could understand the health of an account based on product usage.

IMPACT: REDUCING CHURN AND GROWING BUSINESS

Samange's churn numbers had been rising but with Gainsight configured to gauge customer health accurately, the churn numbers started dropping almost immediately.

"Those initial changes made a massive difference. Gainsight allows us to easily zero in on accounts at risk, empowering us to take remedial action and improve the health of those accounts. The platform provides the essential insight our CSMs need in order to reduce churn," said van Biljon. With Gainsight tuned appropriately, Samanage has reduced churn by 50%, saving the company hundreds of thousands in annual churn related losses. "Our churn rate is now in single digits, which is unheard of in our industry," said van Biljon.

> "GAINSIGHT SHOWED ITS COMMITMENT TO OUR SUCCESS, SHARING BEST PRACTICES AND HELPING US FIGURE OUT HOW TO SOLVE OUR PROBLEM. THE PROFESSIONAL SERVICES TEAM GUIDED US ON HOW AND WHERE TO FOCUS OUR TIME WITH OUR CUSTOMERS. WHAT WE DISCOVERED IN THE COURSE OF THE RETOOLING WAS THAT WE HAD MADE THE MISTAKE OF NOT FEEDING THE RIGHT DATA INTO GAINSIGHT. PROFESSIONAL SERVICES MADE SURE THE PLATFORM WAS CONFIGURED TO GIVE US A MORE ACCURATE VIEW OF CUSTOMER HEALTH"
>
> **RYAN VAN BILJON**
>
> **Vice President of Sales and Services**

LEVELING UP: OUTCOMES

Challenges of Growth-Stage Customer Success

During the Achieving Outcomes stage, the objective is to get from reactive customer success to proactive customer success as fast as possible; getting from churn-fighting to creating revenue growth quickly.

The number one challenge you'll experience in this phase of growth is change management. Change does not simply involve new technologies and processes, but on an individual level, psychology and emotion play a crucial role. Successful change management brings all the challenges together in order to make the change as smooth as possible for the people that need to face the change.

The change needs to be embraced from the top-down. The executives or team leaders often insist that the new system be implemented by their teams, but then they do not use it themselves. For smaller teams where leadership and executive roles overlap, this is especially important. It is vital to bear in mind that when individuals are successful in their transitions, and feel supported in their journey through change, the whole initiative works and the change is successful.

> "THE NUMBER ONE CHALLENGE YOU'LL EXPERIENCE IN THIS PHASE OF GROWTH IS CHANGE MANAGEMENT"

There are four axes of Change Management that make up the effective **WNDYR Thinking Framework** approach to help teams unpack and understand those challenges and their solutions. The framework is a methodology consisting of four lenses to make informed decisions in order to unpack a problem and create a way forward.

INDIVIDUAL LENS

Often times, and retrospectively, we find ourselves thinking about what we could've done differently in a situation. Instead of just reviewing learnings post-problem, the individual lens offers agency. It requires you to think about what you can do at the moment of encountering a blockage. It turns the lens on oneself, compelling us to take personal responsibility within a team. For customer success, you would need to instill customer-centric behaviors in yourself and your team.

LEADERSHIP LENS

This lens asks you to consider the role you play as a leader as well as the roles your overall leadership team plays during the development of a customer-centric mindset. It is fair to say that this shift isn't automatic, easy or even intuitive for most people.

When viewing change management objectives through this lens, your first thoughts in the morning and last before you go to bed will tend to be on whether you're achieving your own goals in order to help your customers achieve theirs.

PROCESS LENS

We generally have technology in place to "solve" this for us and often times we place blame on either colleagues or leadership when things don't seem to work. But what if we think about how and why we have certain systems and processes in place? If we stop to think about the "how" and "why" of any process inside our businesses, we'll often find that it is difficult to answer.

Frequently we find processes that are over complicated or outdated. The right questions to ask in order to address this are; "does this person/teams/stakeholders need to be involved?" or "is there a smarter way to do this?"

The ultimate aim of reviewing process for customer success is creating a process whereby clients adopt products and processes with ease, as quickly as possible. This involves quantifying that "ease" as well as the speed.

SYSTEMS LENS

While it's all good and well to have a streamlined process in place, if that process is not applied in a proficient system there's a high likelihood that your success will be limited.

Is email the best way to communicate and task within a team? Is the time tracking software you are using really giving you the data you need? Is it a good idea for your colleague to keep the latest copy of a report on their hard drive? While the answer to all of these is probably "no", there is a tendency to do so anyway.

Many systems blockages stem from thinking "if that the way it has always been done, it must mean it is the best way". Unpack these and you'll soon become aware of better solutions!

Moving from Customer Success to Customer Growth

Luckily, the steps to follow in order to progress from Customer Success to Customer growth are a settled debate in the customer success community. Your efforts have one goal: **driving customer growth.** We recommend you focus on the following 6 processes that will help you achieve that goal.

1. ADOPTION MANAGEMENT

As we outlined in the challenges section, developing an easy, fast adoption methodology is critical to achieving growth at scale. And the first step to creating that methodology is measuring and benchmarking your customers' adoption - effective communication will influence these benchmarks, as you will learn from our interview with Michael Redbord's HubSpot team. There's a four-factor framework to do it. We call it **DEAR**. It's designed to be a completely objective adoption framework made up of only hard numbers.

DEPLOYMENT: How many licenses are deployed? If your customer paid for 100 licenses and 50 of them are deployed, adoption is unhealthy. We always aim for 100% deployment, or you'll be at high risk of down-sell and churn. Your deployment score may differ as your business model differs (are you license based?) but you should be measuring whether your customers have at least deployed what they paid for.

ENGAGEMENT: Is the customer engaged with your company? How many check-ins have you had? Typically three successful check-ins per quarter earns a green score, but for low touch customers, you will need a different engagement standard.

ADOPTION: We break out the core adoption score into two factors: Breadth and Depth. In other words, breadth measures how many different key features a customer is using. Depth looks at what percentage of customers are considered Healthy Active Users (HAUs) as a function of what behaviors you've judged to be emblematic of user health.

ROI: Lastly we look at whether your customer is achieving return on their investment. This score will require you to agree on a metric of success at the beginning of the deployment, and check in on progress toward that goal on a regular basis. Is it time-saving? On-target earnings? A different usage-related metric?

Another real danger lies in having clear objectives and a great system, but no one is using the system! A valuable equation to better understand the importance of adoption is Q x A =E, that is, Quality multiplied by Adoption equals Efficiency. In other words, if you increase quality but you don't increase adoption, the gains in efficiency will likely be very low.

2. RENEWAL MANAGEMENT

You want renewals to happen as predictably and automatically as possible, but that doesn't happen by accident. There are four things you need to be thinking about as you systematize your renewals process.

VISIBILITY

You'd be surprised how many companies can't immediately look at a dashboard of upcoming renewals or instantly know when a company's renewal date is 30 or 60 days out. The first step to renewing a customer is knowing when their contract is up. Ideally this will be easily visible across departments and centralized for all customers.

FORECASTING

Sales teams have gotten incredibly sophisticated at forecasting new business. Customer success has an inherent advantage of a long and deep relationship with the customer, and yet renewals forecasting can often be an afterthought. It's often taken for granted, and then churn blindsides you. Do you have an accurate and reliable forecasting methodology?

EXECUTION

Renewals efficiency is all about removing friction. This means having your ROI quantified. Having your communications cadence optimized. Being in touch with all the key decision-makers and stakeholders. It should be seamless and repeatable.

AUTOMATION

The most scalable renewals processes are as automated as possible. With self-service business models, this is baked into the DNA, but it's achievable for higher-touch models as well. It simply takes the right systems for scale.

3. EXPANSION MANAGEMENT

The fastest way to move from success to growth is through an efficient expansion process. Your customers are growing, and you need to channel their growth into growth alongside your own. There are 3 steps:

IDENTIFYING OPPORTUNITIES

What customer behaviors are indicative of expansion opportunities? It takes a deep understanding of your clients' business goals and challenges to quantify this. We think about it in terms of spotting space for expansion. It may not always be in conjunction with a renewal. Are your customers stretching their licenses? Is there a quick win with regards to a feature or new product roll outs?

COORDINATING WITH SALES

This stage is contingent on your organizational structure. However, most businesses locate expansion underneath a Sales or Account Management function. Are you surfacing opportunities seamlessly to AEs or AMs? Do they have the necessary information to succeed? And above all, are hand-offs seamless from the customer's point of view?

ALIGNING TO THE CUSTOMER JOURNEY

This is critical. Every company wants to sell more and more to their customer base, but you can't lose sight of the customer's *desired outcome*. Will the up-sell or cross-sell effort help them achieve this? That's the foundation of Expansion Management. Ideally, you've planned alongside your customer for these expansion opportunities!

> "THE FASTEST WAY TO MOVE TO GROWTH IS THROUGH AN EFFICIENT EXPANSION PROCESS"

4. STAKEHOLDER ALIGNMENT

One of the peculiarities of B2B customer success is that the people who use the product aren't usually the people who buy the product which means it may take several third parties (like a CFO, CIO, and even a CEO) to green-light the purchase. With that in mind, we recommend planning your efforts in such a way that they would satisfy any senior leader - making use of WNDYR's *Thinking Framework* is useful here!

Here's a great approach on how to get everyone aligned:

Create an agenda and make sure everyone receives it well ahead of the meeting. Doing so prevents the meeting from derailing while setting expectations around points of discussion.

Emphasize ROI by unpacking how your team have fulfilled the need your customer purchased your service/product for. Present numbers and data points that demonstrate this.

Present benchmarking data to show how much better your customers are doing in comparison to the competition by sharing hard data.

Lock in solid goals for the quarter ahead - in some cases, this might be a good time to bring up expansion opportunities (i.e., show the customer other products/add-ons that will help the company achieve whatever goals you set forth).

Make sure their executives are there - be your customer's champion by making your key stakeholders look like a rock star in front of their bosses.

Create a beautiful presentation: It's simple, but not easy. You should have a standardized template for a brief slide deck you use for all your alignment activities.

Our Pro Tip? The biggest cause of *unpredictable churn is sponsor change!*
We recommend building a play-book for when your champion changes companies or roles.

5. RISK ESCALATION

We've said that the key to moving toward Growth is moving toward being proactive and away from being reactivity. One of the things that will help you spend less time reacting is to systematize your risk response process. There will always be risks you need to address, but if you do it in an efficient, standardized way, it will free you up to spend more time being strategic and proactive. We recommend thinking about escalating risk across three levels:

Level 1: Team Level

This stage of escalation happens on a cadence. Have regularly scheduled rundowns on yellow or red clients while getting insights from team leads, other post-sales departments

and other cross-functional teams like Product. The first step of escalation is to the Team Lead.

Level 2: Executive Level
Escalating to the VP Customer Success or the Chief Customer Officer happens through automated calls-to-action based on predefined criteria. There's also a meeting and review cadence for at-risk clients on a weekly basis.

Level 3: To The Top
Depending on the level of risk/strategy, you may have a process for escalating to the CEO. As with every stage of escalation, it needs to happen on a cadence or by meeting a set of predefined criteria. There should be no ad hoc risk escalation if you want to scale.

6. SUCCESS PLANNING

So much of your company's success is contingent on your customers' success. That means you need to be working closely during the earliest stages of each customer relationship to agree on what success means, how you'll measure it, and the milestones along the way as you achieve it.

STEP 1: ALIGN AND DELIVER

Capture: At Closed-Won, meet with clients to capture their ultimate desired outcome.
Plan: Together, work through a strategy based on your record of successful implementations to prescribe a plan for meeting those outcomes.
Document: This can't be a verbal commitment - you'll need to document every step along the way while making sure everything is visible to stakeholders.
Deliver: Follow through on your promises at each milestone.

STEP 2: DEMONSTRATE VALUE

Okay, you've captured, delivered, and documented your customer's desired outcome. Job done, right? Not quite. It's not enough to drive success, you need to prove it and close the loop with your customer, ideally in a formal review.

HOW YOUR ORGANIZATIONAL STRUCTURE WILL CHANGE

During the growth phase of customer success, you'll need to adapt for the challenges of growth by **consistently instilling a customer-centric culture in your team, primarily through applying WNDYR's Thinking Framework.** As you scale you'll tend to include Sales skills more often and it's likely you'll separate the CS department into CSM roles (continuing as trusted advisors) and AM roles (to optimize revenue growth). Similarly your team will rely more on technology in order for your per-CSM portfolio to increase as you look to automate processes wherever you can.

It time for us to explore the insights from our second group of practical situations that will help your team through their CS journey!

CS INTERVIEW



HubSpot

Michael Redbord

Michael Redbord is the VP of Services and Support for HubSpot, where he helps companies shape their marketing plans and online strategies.

Prior to this role, Michael was the VP of Customer Support and Implementation at HubSpot, managing the company's industry-leading support team in providing the highest possible customer and partner service. Before then, he worked directly with customers as an Inbound Marketing Consultant and pioneered the HubSpot Academy team, helping provide online education to HubSpot's customer base.

MATURITY STAGE BEFORE
Insights & Actions

MATURITY STAGE AFTER
Transformation

HUBSPOT'S CHALLENGE

Moving away from a call-and-check-in mentality to a data-driven mentality that is segmented and specialized per type of customer.

HUBSPOT'S SOLUTION

- Continued with calls but brought structure to them
- Started doing customer segmentation
- Executing different play-books for customer segments at an operational level through customer operations and program managers. In other words, we operationalized the customer life cycle. We did different things based on the age of the customer.
- Re-jigged commercially and added a renewal element into our contracts
- Built a unit inside the support team which gives the customer feedback to product

> "WE'VE LEARNED THAT WHEN YOU'RE SMALL, YOUR MARKETING IS YOUR VOICE WITH YOUR BRAND. THE WEBSITE CAN MAKE YOU SEEM BIGGER THAN YOU ARE. USE THIS TO MARKET YOURSELF INTO GROWTH. BUT WHEN YOU SUCCEED AND GROW, THEN CUSTOMERS BECOME IMPORTANT. IF YOU HAVEN'T TREATED THEM WELL, IT WILL BECOME A HEADWIND TO GROWTH. BUT IF YOU TREAT THEM WELL IT IS A MASSIVE TAILWIND FUELED BY THEIR WORD OF MOUTH"

THE RESULTS ACHIEVED

The business was able to navigate a significant storm in 2012/2013 because we brought Customer Success to the fore to manage a major organizational and technical shift. **The change management needed during this phase was enormous and we were able to handle it through CS.**

HOW HAS CUSTOMER SUCCESS EVOLVED AT HUBSPOT SINCE THE BEGINNING?

Michael Redbord has been on the HubSpot Support team since (almost) day one. He's seen firsthand how true customer success grew inside the company starting around 2012-13. The HubSpot team began to realize the differences between types of customers, and introduced segmentation to better serve each kind of client. Redbord and his team realized that the more homogeneous an install base, the better his team were at meeting its needs.

The second major tactic after segmentation was getting more operationalized across the customer journey. The teams needed consistent play-books based on segment and life-cycle stage. And they needed those play-books to be coordinated across all the customer-facing teams. After all, mature customers have different needs than young ones.

Furthermore, HubSpot's Support and CSM need deep alignment and easy communication channels to manage escalations and incidents efficiently.

HOW HAS HUBSPOT ALIGNED ITS POST-SALES TEAMS TO FUEL IT'S PRODUCT SUCCESS?

The number one untapped resource for most companies as they work to develop and improve their product is their customer base.

Too many companies have no way to funnel feedback from the customer to the product in a way that's both systematic and helpful for the Product team. At HubSpot, the Support organization has a dedicated team that gives customer feedback to Product.

That feedback can be used to influence the road-map, development cycles, incremental improvements, and the loop can be closed with customers to make sure they know they have a direct impact on the product going forward. That's crucial to deepening the investment they have with HubSpot. They know if they stick with it, the product will continue to grow and scale alongside them and their value will grow and scale as well.

glassdoor

CASE STUDY

THE CHALLENGE

Ensuring No Customer Goes Unattended

Like many growing businesses, Glassdoor has evolved its Customer Success organization over time. Rapid growth meant the company was gaining more customers than its Customer Success Managers (CSMs) could handle.

When the organization was initially launched in 2010, dedicated CSMs worked alongside along sales reps and account managers to engage with customers. Now CSMs are responsible for onboarding customers and building and delivering Quarterly Business Reviews (QBRs). More recently, the company added pooled Customer Success specialists to its Customer Success model.

Each dedicated CSM at Glassdoor delivers high-touch, personalized service to 20-50 enterprise customers on average. Obviously, this approach is only economically feasible across a manageable number of accounts. A pooled CSM model enables the scale to support a high number of SMB accounts, but introduces the risk of tasks getting overlooked. A combined model of dedicated CSMs and pooled Customer Success specialists is necessary for many businesses–yet requires the right processes and technology to work effectively.

THE SOLUTION: PAVING THE WAY FOR SUCCESS WITH GAINSIGHT

Glassdoor equips its Customer Success organization to succeed with Gainsight. The combination of Journey Orchestrator, Calls-to-Action (CTAs), and dashboards driven by a Matrix Data Architecture (MDA) has positioned Glassdoor to enable its hybrid model.

By deploying a Gainsight CTA object within Salesforce, the Customer Success organization can ensure customers get needed guidance and assistance. CTAs are categorized into activities such as onboarding, re-

> "GAINSIGHT IS AN INCREDIBLY POWERFUL TOOL. USE THIS SOPHISTICATED PRODUCT WELL AND THE POSSIBILITIES ARE ENDLESS."
>
> **MARK KISH**
>
> **Senior Manager of Customer Success and Operations at Glassdoor**

newal, business review and more. Within Salesforce, all CTAs are created under a single user. Once a CTA is triggered in Salesforce, the CRM system assigns the appropriate Customer Success specialist, which it communicates to Gainsight.

Using Journey Orchestrator, Glassdoor created emails that get sent to these customers. The emails include a Calendly link, so the customer can click to schedule a meeting with the assigned Customer Support specialist. In addition, Glassdoor automates a variety of other emails, such as those related to onboarding and poor NPS scores. In this way, Customer Success specialists and CSMs are offloaded of routine–yet essential–tasks, while Glassdoor can be confident that no customer goes overlooked.

IMPACT: CENTRALIZING AND STANDARDIZING PERFORMANCE TRACKING

When customers take full advantage of Glassdoor's features, they can drive more clicks and applications. As such, the Customer Success organizations tracks feature usage and how well its customers' jobs are performing in the marketplace. In the past, the Customer Success organization had to consult multiple internal systems to figure this out. Now it simply refers to Gainsight.

Dashboards used by individual CSMs show how they are performing, while a manager dashboard shows the team aggregate. An additional executive dashboard shows the aggregate performance of each Customer Success leader.

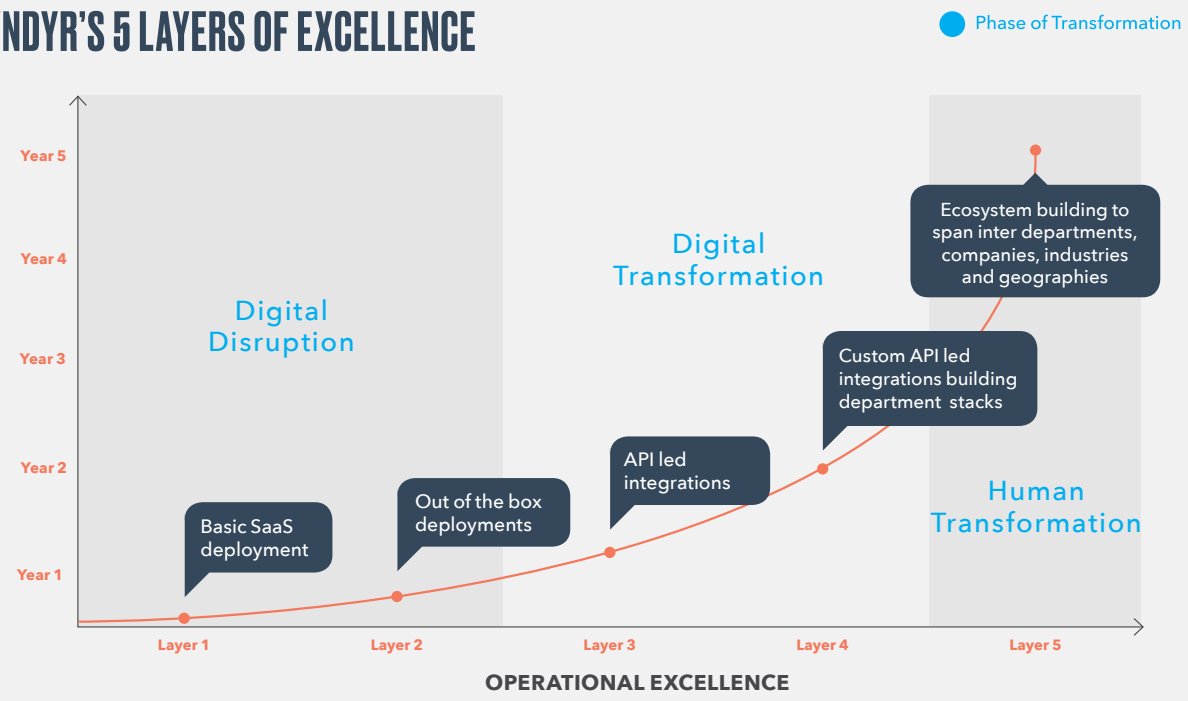
With Gainsight, the Customer Success organization also moved from the manual health scoring it executed via Salesforce to ensure a consistent, standardized health score. Instead of determining risk factors based on the subjective input of CSMs, Gainsight now sees an objective measure of risk across the board using the Gainsight Customer Health Score.

REACHING THE PEAK: TRANSFORMATION

Challenges of Enterprise Customer Success

If you imagine your company-wide transformation on a five-year grid from legacy to digital or from growth stage to enterprise. Your customer success organization will progress through five layers on your path to excellence.

WNDYR'S 5 LAYERS OF EXCELLENCE



This digital transformation is *imperative for all businesses, from small to the enterprise* in order to survive. While this message comes through loud and clear, what it actually means and looks like in practice is often left blurry.

We believe this blurriness comes from a lack of a defined process; just like when training for a race, it makes sense to compartmentalize one's preparation into identifiable milestones or layers in order to achieve success. At WNDYR, we call these milestones in the journey the **5 Layers of Excellence.**

WNDYR'S 5 LAYERS OF EXCELLENCE

Generally speaking, digital transformation focuses on two things – firstly, the introduction of digital platforms into multiple areas of a business and secondly, the fundamental transformative changes of that teams need to make as they work to deliver value to their customers.

THE EVOLUTION OF CUSTOMER SUCCESS

All organizations embarking on this journey starts at Layer 1; this initial layer is largely disruptive to the nature of a business. This happens due to the reshaping done to the company as a result of a productivity solution being launched into a company. This introduction encourages customers inside Layer 1 to scrutinize and challenge many of the assumptions around how work is managed and completed within organizations.

Once your company refines its internal processes and realizes that you can achieve greater results through further customized deployment, you reach Layer 2. Frequently, organizations cross into Layer 2 when their ongoing experiments with systems and processes deliver new ideas and possible opportunities.

Layer 3 is when things really get interesting – at this stage, successful organizations have realized the value of the platforms they use and find them influencing their success rather than hindering them. As such, Layer 3 is the part of the journey where the hard work from the previous layers bear fruit; the systems and processes are configured, users are trained and the team's targets are set. The digital tools have gone from being disruptive to enabling transformation within an organization.

> "THE FASTEST WAY TO MOVE TO GROWTH IS THROUGH AN EFFICIENT EXPANSION PROCESS"

This realization can only happen once teams are comfortable with the new systems, processes and ways of working. Teams actively feel the impacts of work inside Layer 3 when their organizations begin to introduce standard API led integrations, like DAM platforms, to their productivity stack to ensure further growth and increased efficiency.

Finally, the organizational need for further customized API integrations for departmental stacks and integrations brings us to Layer 4. Similarly to Layer 2, Layer 4 relies on the company's ambition in further fine-tuning their internal processes, not for the sake of efficiency, but rather to enable individual inside the organizations – this is Layer 5; Human Transformation.

These layers most closely align to technology implementation from basic deployment all the way through Layer 5—a comprehensive ecosystem unlocking human transformation. But they also align to a culture shift from a basic commitment to organizational customer centricity—perhaps a pilot program—all the way through a true company wide customer focus that suffuses each department, role, office, and hierarchy. **In other words, customer centricity becomes intuitive.**

Company Wide Customer Success

PRODUCT SUCCESS

You interact with your customers through tons of different channels: face-to-face at events, through email, through phone calls. But flip it around and think of it from the customer's perspective. Almost all of their day-to-day interactions are happening in your product! The first step toward Transformation is recognizing the customer lives in the product.

As a customer success professional, you need to be inside the product as well, and that means Product Management is your new best friend. Do you share information freely back and forth between Product and CSM? Do you have shared definitions of usage, adoption, and deployment? Are your goals and metrics aligned and complementary?

Secondly, are your touch points happening inside the product? Feedback, surveys, outreach, training, onboarding, even renewal and expansion—are they accessible to customers in the channel they live in the most? Going back to the thinking framework, this will require a transformation of leadership (your org chart will need to adapt), process (you'll need to develop cross-functional operations), systems (your product data and CS data will need to merge), and teams (PMs and CSMs should operate at least somewhat inside a "pod" structure).

ADVOCATE ENGAGEMENT

In a helix revenue model, as opposed to a pipeline, your customer base becomes fuel for new revenue. A big part of that is operationalizing advocacy. It shouldn't be accidental when a customer leaves a great review online. It shouldn't be just good fortune to get a case study. You should have a stream of successful clients raising their hand to advocate. It's not accidental, it's operational and the *first step is to ask*. You'd be surprised how many companies don't even do that! The second is to create a reward system. And the third is to create a cadence to prevent advocate burnout. There are two factors to finding the right time and the right candidate:

Identify opportunities for advocacy: The first step is to align life-cycle milestones to advocacy asks. Did they just achieve first value? Leave a review. Did they renew? It's time to do a case study. Did they accomplish their desired outcome? Perhaps it's time for a speaking slot at your event.

Identify candidates for advocacy: It's never a good idea to ask a struggling customer for an advocacy event. But you need systems in place to tie advocacy asks to customer health. With a criteria in place that includes a cadence, health scores, and other factors, you can identify the best candidates for advocacy and ask at the right time.

> "THE FIRST STEP OF ADVOCATE ENGAGEMENT IS TO ASK – MANY COMPANIES DON'T EVEN DO THAT!"

SUPPORT EXPERIENCE

Support teams are the first line of defense against risk as it arises. But in enterprise companies, Support is often siloed, creating a very wobbly three-legged structure with Product and Customer Success. All three need to be deeply aligned cross-functionally, and there are four main questions to ask:

Aligning Support With Product

- Do you drive Support data back into the road map?
- Do you triage product bugs separately from feature requests?

Aligning Support With CS

- Do you Drive Support data back into the journey map?
- Do you triage learning issues separately from product issues?

Sharing data seamlessly between each team solves a lot of problems, but understanding which team out of the three has the highest leverage in various scenarios is the most important. Bugs and feature requests have different processes and engineering teams in enterprise companies. Likewise, training customers may solve product issues without the need for a PM.

SERVICES EXPERIENCE

Transformation-level companies apply customer success best practices to Professional Services. Instead of customer health scores, they're tracking project health scores. They're able to capture desired outcomes and benchmarking against them during their time on the project. They're aligning those project outcomes to the overall customer outcomes.

Fundamentally, these teams understand that **they're not selling a project, they're selling an outcome.** They're not selling a tool and training you to use it. They're more like a general contractor you trust to deliver you the remodel of your dreams.

Any of the above best practices can and should be adapted as much as possible into your Services organization.

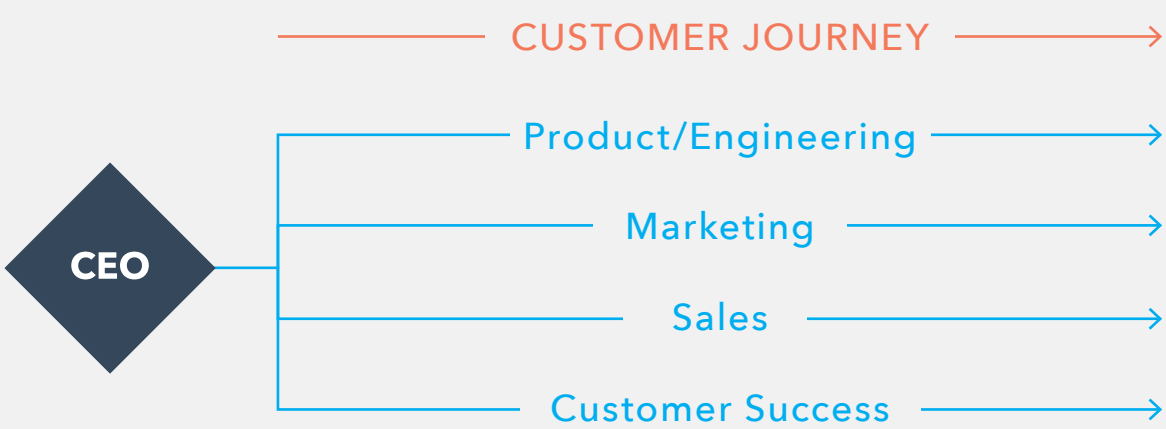
HOW YOUR ORGANIZATIONAL STRUCTURE WILL CHANGE

During Layers 3 and 4 of Digital Transformation, most companies are already working at an extremely high level of sophistication and specialization. While this makes it a challenge to adapt and steer the ship, this high caliber positions them to run a highly sophisticated and specialized customer success organization very well. This is an advantage most early-stage companies *don't have*.

It is likely that at this stage, your strategic leaders will be stratified from tactical leaders. Your CSMs will have found and equalized to a healthy ratio of CS Ops professionals to CSMs. And most likely, your CSMs will be operating on some level of variable compensation. It should be a much lower ratio of variable to base than in typical AE teams, and also it should come as a factor of on-target renewals rather than bookings.

Your team will need a seat at the table at the C-level in order to maintain the customer-centric vision across the company and to better align with cross-functional departments like Sales and Product. The way we visualize this type of organizational structure is horizontally rather than top-down, where the chart is optimized for the customer journey across departments:

STRUCTURE OF TRANSFORMATION LEVEL CS ORGANIZATIONS



Well done! You've done it. Let's dive in one last time to our learn from the insights of our final round of interviews and case studies!

CS INTERVIEW



HubSpot

Eva Klein

Eva Klein is VP of Customer Success at HubSpot, a technology company that builds sales and marketing software.

In her current role, Eva brings her many years of experience in the quantifiable world of business development, to the softer art of customer success. Prior to joining HubSpot, Eva held senior positions at Constant Contact, Invoca, Enservio and FatWallet and has also served on advisory boards for Google, Rakuten Marketing, Commission Junction, and CouponCabin.

MATURITY STAGE BEFORE
Outcomes

MATURITY STAGE AFTER
Transformation

HUBSPOT'S CHALLENGE

The Customer Success team was a sales team and therefore the customer's best interest was at conflict with the CS' team's incentives and drivers.

HUBSPOT'S SOLUTION

HubSpot moved sales activity out of the CS organization and retention numbers skyrocketed. They moved away from "time-based" implementations to focus on success as well as creating a high-touch program for larger clients.

"WITH CS SITTING AT THE MIDDLE OF MARKETING, PRODUCT AND SALES, YOU'RE ENABLING AN ORGANIZATION TO PLACE CUSTOMERS AT THE HEART OF OPERATIONS. IT'S ALL CUSTOMER SUCCESS!"

HOW DID HUBSPOT SOLVE THE TENSION BETWEEN DELIVERING ON THE CUSTOMER'S BEST INTEREST AND THE CSM TEAM'S INCENTIVES AND DRIVERS?

It's one of the trickiest lines to walk in customer success: how do you align a team's financial goals with the customer's goals in a variable compensation model? At HubSpot, the first step was moving Sales activity out and focusing on success. They moved from a time-based implementation system to one in which success was the primary measure.

The HubSpot team implemented a color-coded alert system with a data scientist on board using a mix of their own technology, Gainsight, and Salesforce.com.

HubSpot also introduced a high-touch program to focus on larger clients, moving them into a consulting service mode. They gave this away and didn't charge as professional services.

Retention numbers skyrocketed. Now HubSpot can focus on programmatic approaches to pro-actively reach the customer where they are at any given stage in their journey.

HOW DO YOU DEFINE A CUSTOMER-FIRST BUSINESS MODEL?

At HubSpot, being customer-first is all about scaling the product to meet the customer as they grow, not the other way around. It's really about being "outside-in" rather than "inside-out." But to do that, you need to deeply understand the customer's definition of value—and meet it.

It means that your goals—growing revenue, achieving incentives, accelerating your career—need to be aligned to the customer's goals. That means aligning customer health to compensation. It means understanding where the customer's value is—not short term transactions, but long-term relationships. In other words, compensation complementing Customer Lifetime Value, not competing with it.

Adobe

CASE STUDY

When you have as large a customer base as Adobe, the Voice of the Customer (VoC) isn't a whisper—it's a shout. Without a sophisticated way to listen to customers, act on feedback quickly, and leverage it for impact, Adobe leaders wouldn't be fully informed when making major strategic decisions. Gainsight's robust VoC functionality empowers Adobe to collect objective data points on customer satisfaction (CSAT) and sentiment. Adobe and Gainsight partnered to build out an impactful VoC strategy consisting of 3 components: Listen, Act, Analyze.

LISTEN

At the close of each customer's onboarding engagement, Adobe automatically issues a CSAT survey through Gainsight. To optimize response rates, the deliverability details of the survey email are customized by segment.

Additionally, using survey analytics provided through Gainsight, Adobe had the insights to continually refine its survey strategy to achieve the most engagement from survey recipients.

ACT

Listening to customers is just one part of the equation. Without an operational process to take action, the feedback loop is just an echo chamber. Based on the CSAT Score given by a customer, Gainsight routes the feedback and CTA to the appropriate team member for action. For example, CSAT scores below 8 (out of 10) trigger CTAs with re-engagement Play-books.

They're automatically assigned to different stakeholders at Adobe based on which question received the low score. Once actions are taken to address the concerns expressed by the customer, a follow-up survey is sent through Gainsight asking whether improvements were made since the initial CSAT, closing the feedback loop and assessing the efficacy of Adobe's actions.

> "GAINSIGHT FOR VOC HELPS US TO BETTER LISTEN TO OUR CUSTOMERS, ALLOWING MY TEAM TO FOCUS ON DELIVERING WHAT THE CUSTOMER NEEDS, WHEN THEY NEED IT"

SUSAN UNDERWOOD

Head of Worldwide Client Success at Adobe Sign

ANALYZE TO DRIVE IMPACT

Using the feedback gathered through Gainsight, Adobe has been able to steadily improve their enterprise Onboarding CSAT from 8.25 to 9.15 (out of 10) over the past 18 months. The Onboarding CSAT data and trends are made easily accessible to the executive team in a Gainsight Dashboard. Beyond just tracking performance, it provides objective data to understand the success of new initiatives, prioritize process improvements, and inform strategic decision making.

For example, Adobe was able to use Gainsight VoC data to justify an investment in fully automated onboarding. To control costs on their onboarding team, Adobe piloted a fully-automated onboarding segment. Adobe A/B tested their approach in this segment to confirm that it was still providing customers with a strong foundation for success. Their Gainsight VoC data confirmed that the fully-automated segment was still delivering a high-degree of satisfaction, with only a minor dip in CSAT compared to their high-touch model.

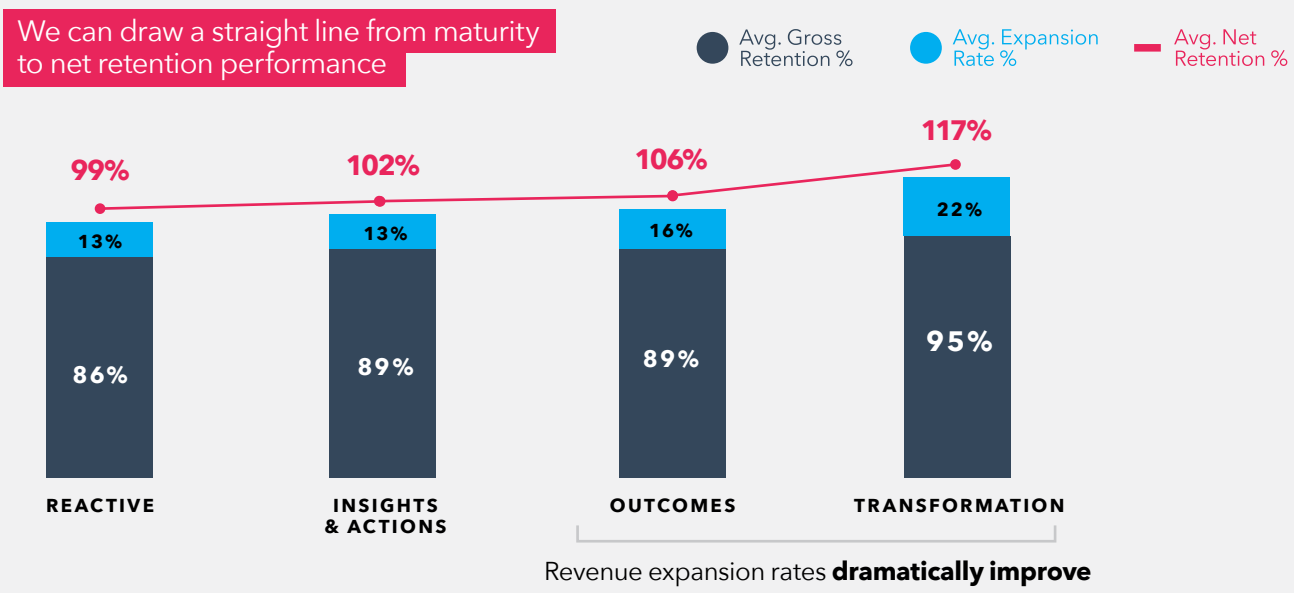
These results gave the executive team the confidence to proceed with fully automated onboarding for their small business segment, where the customers resonate with easily available, self-serve and one-to-many resources.

CONCLUSION

When you progress in maturity across the 5 Layers of Excellence and up each stage of operational maturity, what can you expect the benefits to be? Between our two companies, we've benchmarked hundreds of CS organizations and have consistently found that as your organization matures, your business benefits from growth along four key drivers: **improved retention, expansion, increased advocacy** along with **improved efficiency across your teams.**

NET RETENTION PERFORMANCE BY OPERATIONAL MATURITY STAGE

We can draw a straight line from maturity to net retention performance



We've observed that as teams advance from stage to stage (based on objective criteria), it aligns with measurable increases in net retention. Between Reactive and Insights & Actions, there's a 3% increase in net retention rate (NRR). From Insights & Actions to Outcomes we see a 4% increase while from Outcomes to Transformation there's a massive 11% jump.

This spike in expansion and retention is due to **an integration of technology and strategic CS vision**, where the system and process work and enable the CS purpose. In closing, when embarking on a CS journey, the key is to **adopt a "Customer First" approach** in order to be successful and **be relevant to our customers.**

The success of our CS depends on an aspiration driven by individuals who whole-heartedly believe that customers matter - it is these individuals which give organizations their competitive edge.

CUSTOMER SUCCESS:
YOUR COMPETITIVE ADVANTAGE, TODAY.



WNDYR

Gainsight

WNDYR is a global team of solution designers working to enable Customer Success efforts inside the world's leading companies.

www.wndyr.com

Gainsight aids companies to protect and nurture their most valuable asset - their customers - by delivering deep insights into consumer behaviour.

www.gainsight.com