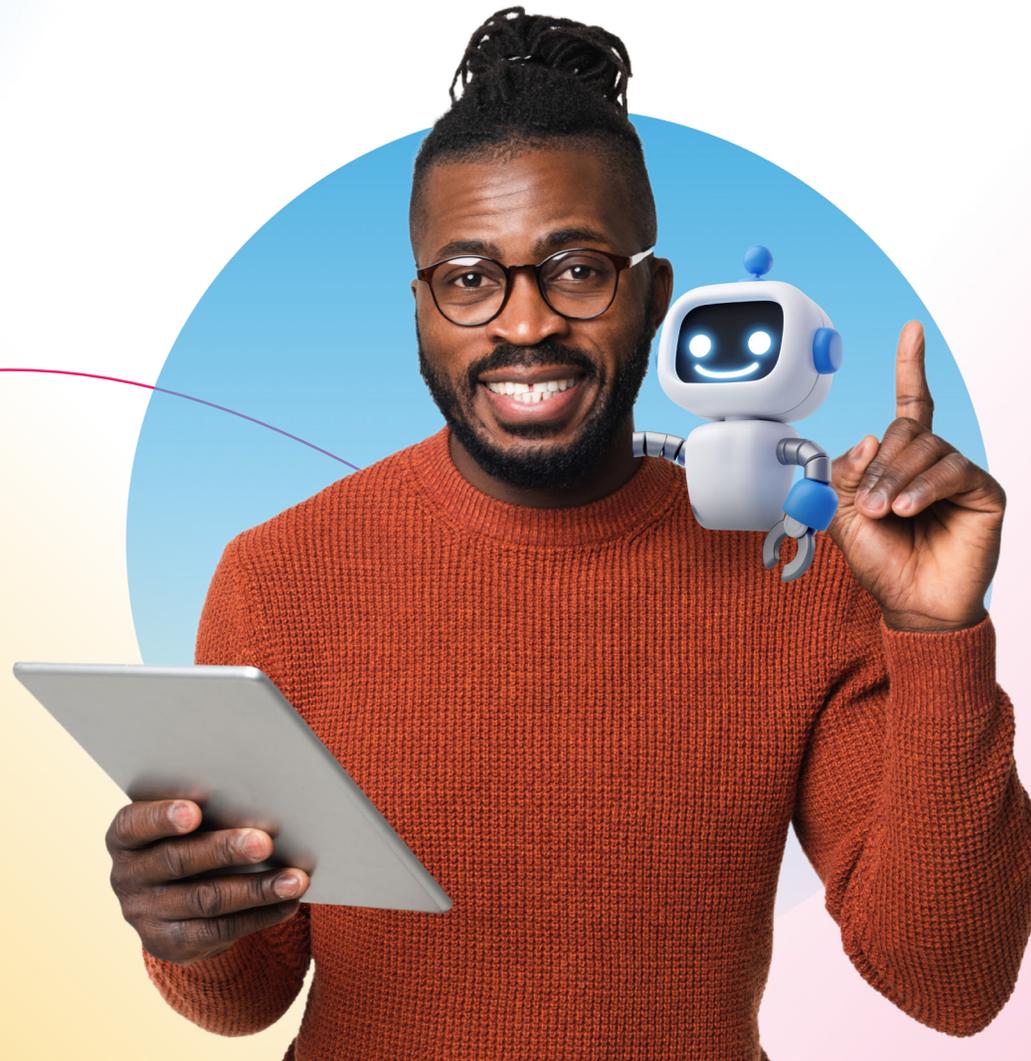


# THE GEN AI READINESS CHECKLIST

## FOR SAAS CUSTOMER SUCCESS LEADERS IN 2024





## Introduction

Generative AI has emerged as a show-stopping force in virtually every corner of the business world. Customer Success (CS) is no exception. As we continue to weather a market that demands we do more with less, CS leaders are looking for answers on Gen AI adoption. The *question du jour* of Q1 2024: When and how should SaaS CS leaders leverage cutting-edge AI solutions to enhance customer motions and scale Customer Success Manager (CSM) output?

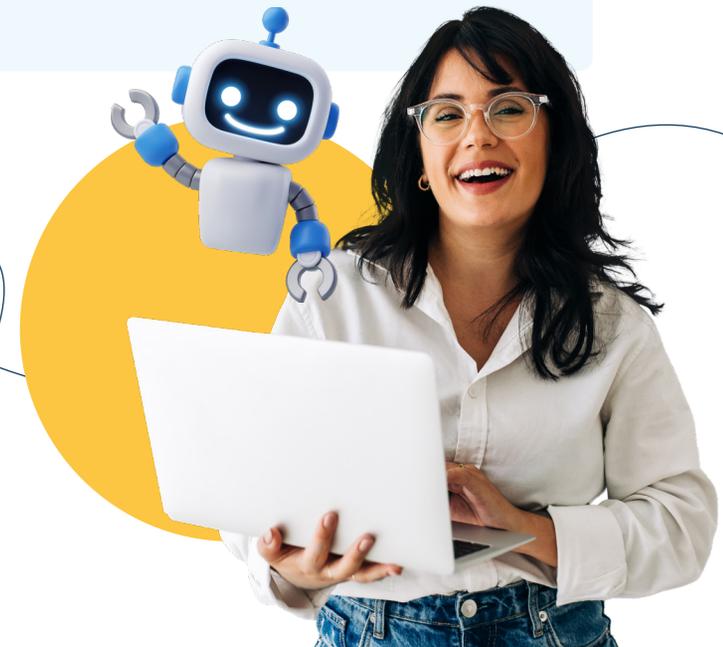
At Gainsight, we believe Gen AI will only accelerate how we create authentic, human-first moments with our customers—and reclaim more of our time for the tasks that matter most. But we also recognize that adopting Gen AI solutions isn't a one-size-fits-all proposition, and business leaders must ensure data security and invest their resources in the actions that will have a real, immediate impact on team efficiency. That's why we designed this Gen AI readiness checklist for CS leaders in SaaS.

Every organization's AI roadmap will look a little different, but these six points are essential to consider when tailoring how you will make the most of AI for your specific business needs.

Let's dive in!

# AI Readiness Checklist: At a Glance

- ✓ **Elevating Talent: Gen AI Training and Skills Development**
- ✓ **Safeguarding Data Security and Privacy in CS**
- ✓ **Ensuring Data Integrity to Accurately Score Customer Health**
- ✓ **Find Your Starting Point for Gen AI: Pilot Projects and Early Adopters**
- ✓ **Strategic Partnerships: Vendor and Tool Assessment**
- ✓ **Continuous Improvement: Evaluation and Feedback**



# 1 Elevating Talent: Gen AI Training and Skill Development



In the realm of Customer Success, talent can make or break your organization. In today's CS landscape, it's imperative to equip your team with the requisite skills and knowledge to leverage Gen AI effectively. What we don't want is for Gen AI to create new inefficient workstreams—or worse, for companies to ban employees from leveraging Gen AI, “which only drives employees underground, costing the security team visibility and understanding how the tech is used and increasing risks,” according to a recent Forrester report, [Securing Generative AI](#).

Generative AI has become table stakes for building efficient, sustainable SaaS organizations in today's market—and CS has a lot to gain from AI adoption. That's why it's important to invest in comprehensive training programs covering a spectrum of topics, including AI fundamentals and when and how to use AI. When you foster a culture of continuous learning and development, you empower your team to harness the full potential of [AI-driven technologies](#) that help them deliver exceptional customer experiences and drive business outcomes.

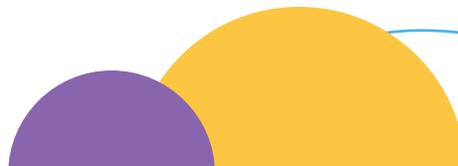
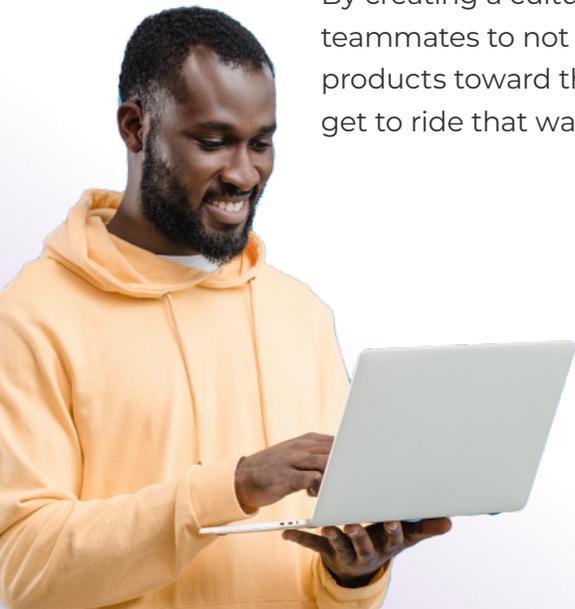
## How Gainsight Does It: Empowering CSMs to Leverage AI

At Gainsight, we're equipping our CSMs with everything they need to use AI effectively. We're setting the stage for a transformative shift within our organization with weekly coWorking enablement sessions named "AI for ALL". According to Brady Bluhm, Enterprise Customer Success Manager, Gainsight, "We are working to ensure every teammate is not just aware of, but also comfortable and skilled in harnessing the power of AI. This initiative is rooted in a hands-on, experimental approach, where learning by doing becomes the cornerstone of our strategy."

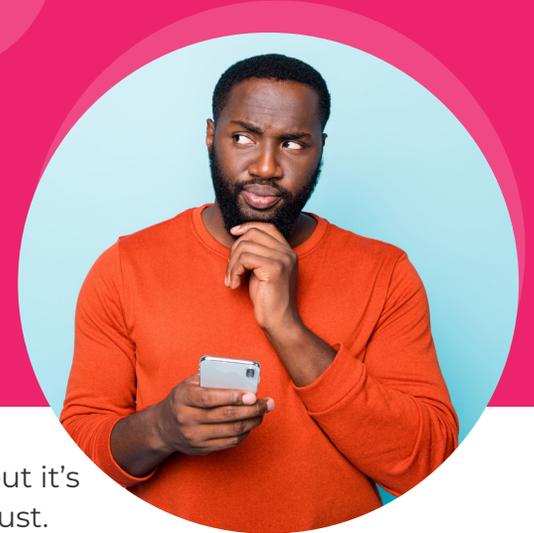
The unique conundrum of AI enablement is that the technology advances at such a fast pace. At Gainsight, we will continue to guide our teams through an experiential process of integrating AI into their workflows, fostering an environment where innovation thrives through collaboration and exploration.

Bluhm continues, "Our commitment to AI readiness transcends traditional training methods. We understand that comfort with AI comes from direct engagement and the freedom to experiment."

By creating a culture that encourages curiosity and practical application, we are paving the way for our teammates to not only adopt AI technologies but to lead with them and, in so doing, also help lead our products toward the most powerful AI integrations. Bluhm says, "Everything is changing with AI and we get to ride that wave into shaping the future."



# 2 Safeguarding Data Security and Privacy in CS



The promise of Generative AI to revolutionize the SaaS market is undeniable, but it's critical to select a [Customer Success Management Platform vendor](#) you can trust. As custodians of valuable customer data, maintaining customer trust is paramount.

When your customer data is used with AI, whether through an embedded internal application or a ChatGPT-type content generator, it's critical to ensure the safety of that data. The best way to maintain your customer trust and data security is to choose trusted vendors to access your sensitive data and do the due diligence on new AI tools.

At Gainsight, we recently conducted a survey on the [State of AI in Customer Success](#). One of our main focus areas was security and trust. The good news is the technology has matured to a point where most survey respondents are confident in the accuracy of AI tools:

- 94% of respondents are very confident or confident in Generative AI's accuracy and analytical capabilities.
- Fewer than 6% of respondents are not confident about Generative AI's accuracy and analytical capabilities.

We also found that 68% of survey respondents think it's very important or important that CS vendors have an AI strategy.

By prioritizing data security and privacy, you reinforce trust with your customers, laying a solid foundation for sustainable growth and long-term success.

# 3

## Ensuring Data Integrity to Accurately Score Customer Health



In the realm of Customer Success, data integrity is non-negotiable. If using an AI tool for new or better data insights, it's essential that your data inputs are reliable. The “garbage in, garbage out” mantra still applies to AI.

Make sure you implement good internal validation processes and data hygiene practices. You can then leverage AI-powered analytics tools to uncover actionable insights and identify trends, but remember that your insights are only as valuable as the data you provide.

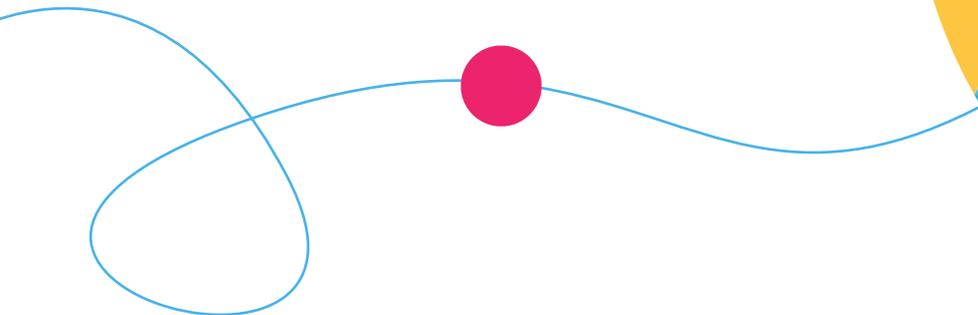
To retain and expand customer relationships, Customer Success leaders need to accurately gauge customer health through meticulously designed scorecards. AI works wonders for that use case.

### How Gainsight Does It: Ensuring Data Integrity With Scorecard Optimizer

Before you start to lean on AI, it's important to make sure you master the fundamentals of data integrity in order to trust your solution's outputs. A great way to do this is with our Gen-AI-powered solution, [Gainsight Scorecard Optimizer](#).

Traditional methods of scorecard creation and optimization often fall short, leading to missed opportunities and unforeseen churns. This is where Gainsight's Scorecard Optimizer, powered by Horizon AI, becomes a true game-changer.

Scorecard Optimizer represents a significant leap forward in the management and utilization of [customer health scores](#). By leveraging a wide range of data points—historical renewal data, adoption data, survey response data, and cases—it offers Gainsight Admins instant configuration recommendations. This streamlines the setup of new scorecards; it also enhances the efficacy of existing ones, ensuring they are as precisely tuned as possible to predict risks and opportunities early on.



# 4

## Find Your Starting Point for Gen AI: Pilot Projects and Early Adopters



Embarking on pilot projects is an effective way to validate AI concepts and demonstrate tangible value within your organization. We recommend engaging a cross-functional team of early adopters and subject matter experts to spearhead pilot initiatives, fostering collaboration and knowledge sharing.

It's also important to define clear success criteria and KPIs to measure the impact of AI solutions. For CS, this has to include customer outcomes—so it's a good idea to invite select clients to your pilot program. Then, you can solicit feedback from pilot participants and stakeholders, iterating on lessons learned and refining implementation strategies accordingly.

Start by identifying key areas within your CS organization where AI can deliver immediate value. Whether it's optimizing customer onboarding processes, streamlining CSM workflows, or enhancing the accuracy of customer health scorecards, pinpointing these high-impact areas will provide CS leaders a roadmap for Gen AI adoption.

Consider a smaller use case to test and assess your AI solutions, creating a learning opportunity to prove value and improve future use. By starting small and iterating as you scale, you can accelerate AI adoption and drive tangible business outcomes for your customers—without taking on too much new technology too soon. Remember: Gen AI is constantly evolving, and it's important to give your team time to learn and grow with whatever AI solutions you decide to invest in.

See how we're piloting AI with our first dedicated Gen AI features:

[Gainsight's AI features: Meeting Assist, Customer Cheat Sheet, and Takeaways.](#)



# 5

## Strategic Partnerships: Vendor and Tool Assessment



Selecting the right AI vendors and technologies is paramount to the success of your efforts. Here are our top three tips for evaluating AI vendors:

1. Conduct a thorough evaluation of potential vendors, assessing their cybersecurity track record, their Gen AI expertise, and their solution's alignment with your business objectives.
2. Consider factors such as scalability, reliability, and interoperability when selecting AI solutions. Remember: AI should make your teammate's lives easier, not harder. Don't go all in on a solution before ensuring it fits into your current tech stack and workflows.
3. Collaborate closely with trusted partners to leverage best-in-class AI technologies that will position you to drive innovation—whatever that looks like for your specific business. Try to avoid AI for AI's sake.

According to Forrester, third party risk management should be top of mind for organizations adopting generative AI solutions. In their June 2023 Best Practice Report, [Securing Generative AI](#), Forrester recommends the following:



**When you buy a product or service that includes generative AI, you depend on your suppliers to secure the solution. Microsoft and Google are taking that responsibility as they bundle and integrate Generative AI into services like Copilot and Workspace, but other providers will source AI solutions from their own supplier ecosystem. You will need to compile your set of supplier security and risk management questions based on the use cases [your organization pursues]. (Forrester, 2023)**

By forging strategic partnerships with secure vendors, you can accelerate AI adoption and deliver exceptional value to your customers.

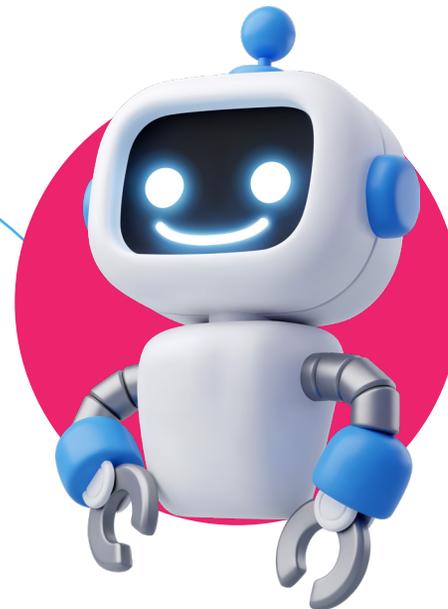
# 6 Continuous Improvement: Evaluation and Feedback



Continuous improvement is the hallmark of successful Customer Success organizations. Early on, take time to establish a framework for ongoing evaluation and feedback, leveraging customer input and performance metrics to assess the impact of AI initiatives on customer outcomes.

It's also important to monitor AI system performance and reliability, identifying opportunities for optimization and enhancement. After your pilot programs have gotten underway, take time to solicit feedback from customers, stakeholders, and internal teams to gather insights and identify emerging trends or challenges.

By fostering a culture of continuous improvement and innovation, you can maximize the value of AI within your organization and drive meaningful outcomes for your customers.





## Conclusion

AI represents a transformative opportunity for SaaS organizations to drive customer engagement, retention, and growth—at scale, and with fewer resources than ever before.

By following this checklist, businesses can systematically prepare for and implement AI technologies to enhance their Customer Success strategies. This approach not only addresses practical concerns such as data security and skill requirements, but also ensures that the adoption of AI is aligned with the organization's value proposition and customer needs.

Ready to get started?

Learn more about [Gainsight's AI solutions](#) today →