

# 1st 90 Days for New CS Ops Hires

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This month, Richard John led the Office Hours for CSOps in taking a deeper look at the need to be strategic when planning for new hires. The first 90 days of a new role can set up a foundation that either leads to success or to a lot of frustration for both the employee and their leader.

Regardless of company size and CS maturity, the three primary focus areas for CS Ops in the first 90 days seem to be:

- **Stakeholders engagement:** Analyzing and building relationships be it internally with the team, the organisation, and externally with the clients
- **Process Optimization:** Optimise at least one key CS process (painpoint), which directly impacts CSM performance
- **Identifying Key Datapoints:** Understanding the data, with the aim of setting up or improving KPIs

It is also very important that you look at the team your hire is coming into. Will they be operating alone in a newly developed CS Ops space? Will they be part of a larger team where processes and expectations have been clearly set? Will they be coming in at a particular level with the goal of moving into a developing space? Knowing this information will help make sure that you are addressing the focus areas in a relevant and immediately applicable manner. It is also good to think about how you can incorporate quick wins into the training. Those low hanging fruit that can begin to build a feeling of confidence in your new employee as well as creating a springboard to more complex processes can go a long way in keeping momentum up.

The questions that were discussed in the breakout sessions were:

1. What does a typical first 90 days look like for a CS Ops hire (when setting up CS Ops from scratch)?
2. What are the key focuses in those initial days?
3. What are some examples of 'Quick Wins'?

During the breakout session, here are some key takeaways the groups came up with:

## Data

- Live in the data
- What are key data points that need to be measured effectively
  - Start small
- Understand the data – what is it telling you?
- Know the gaps in data
  - The data can be a pain point which has been the biggest surprise in 8 months of working in CS
- Design the processes for data collection, interpretation, and dissemination
- Clean up the data so you get an understanding of processes, what's working and what needs to be tightened up
- Learn how data flows, is synchronized to see how it all works together so you can provide the CS teams with meaningful data and optimize the team
- Use data to draw conclusions and drive strategy
- Create dashboards and other visuals to communicate the impact of CS
- Reverse engineering data points by understanding customer journey

## Technology

- Make sure you are getting the right information into the CS tool to track metrics
- What technology does the team need?
- What systems are being used?
  - Digital onboarding
  - Read all support documentation
  - Establish implementation processes
  - Expand where possible
- CS Ops needs to ensure they are tech savvy and ready to work across departments to create systems and processes that ensure they set the customer up for success
- Remember that People > Tools

## Internal Relationship Building

- Get clarity of destination between company, department heads, and team members by asking WHY
- Know the different teams and understand their processes
- The entire company has to be behind and involved in developing the CS team
- C-Level has to have buy in with CS becoming a company-wide philosophy
- Align with internal experts (no one knows everything all at once)
- Learn the company through training and interactions
- Meet teammates and broader staff and ask questions
  - What challenges do you have?
  - What is working well
  - Build relationships!

## Understand Your Customers

- Focus on customer journey by role
- Use the customer journey as an anchor for everyone to start with, then optimize from there
- Know WHO you work with and their needs
- Figuring out how the customer succeeds and designing this into the company
- Understand the needs of the customer and have a focus on education and learning
- Build stronger relationships with the team and your customers
- Achieve goals with customers
- Speak to CSMs and customers (random cross section) to understand the customer journey and identify the needs for improvement (what are the pain points)
- Identifying opportunities for expansion and upsells through customer training, professional services, product upgrades, use cases, etc.
- Understand the customers
  - How many?
  - What types?
  - What industries?
- Start with entry level things
  - Segmentation
  - Onboarding
  - Nurture stage prior to renewal
- Set up QBR's to have opportunities for Upsells, Expansions, Net Retention goals

## Establish Processes

- Understand and drive high value activities
- Learn the current processes and gaps
- Review current process to identify pain points
- 30-60-90 day plan focusing on processes and ensuring you are setting up both CSOps and the customer for success
- Communication processes established
- Invoice process in place
- Identify key programs in existence

- Documenting processes and procedures to allow for scaling
- Evaluate current processes
  - Look for friction on individual contributors
  - What systems are being used/not used
  - What can be improved
  - What is missing
  - Breaking down silos to support CS impact among other teams
  - What future processes should be
  - Automation potential
- Translate strategic thinking into action

### Team Success

- Create swim lanes
- Alignment and expectations established
- Master document of what all roles are doing
- Understand the company, product and people
  - Spend time with stakeholders to understand the big picture and strategy
- Structured on-boarding – soak up and learn the processes if they are currently established
- Ensure adoption and engagement are high throughout
- Training and education on products, CS journey, and aligning KPIs
- Hire the right people for the right roles is imperative – flexible team members will help your team grow in the early days
- Build out QBRs
  - Automate output
  - Work cross functionally (RevOps)
- Celebrate renewals as well as new customers to build visibility

### Individual Success

- Get up to speed and learn ways to be helpful
- Learn effective prioritization
- Create list of customers with basic info about their purchase
- List of software being used
- Meeting the team and establishing relationships
- Setting up recurring meetings with product and success team to review feature requests
- Money inflow makes for early wins
- Identify the critical assumptions that arise over time, which can be validated and assessed.
  - Fresh set of eyes can look at existing processes and recommend enhancements and/or changes
- Learn the portfolio structure, industry, key contacts, and role
- Identify cadence needs
  - Quarterly goals
  - Use cases
- Work on product knowledge and mastery
- Customer portfolio review, introductions, cadence setting
- Absorb, learn, listen
  - Learn the product
  - Review internal documents
    - Look for ways to improve
- Outcome focused – build out next 30 days based on what has been learned
- Focus on setting yourself up for success
- Work to understand objectives met/projects completed
- Don't be afraid to push back on things that need improvement
- Understand the customer base, key team members, customer churn (and why)
  - From contributor to KPIs
- Focus on:
  - Key internal relationships
  - Individual and team KPIs
    - Performance and development
  - What are you doing to capture interactions with customers and customer activity

Richard John is based in Amsterdam, The Netherlands and offers data analytics services for CS. His purpose in partnering with CS teams is to equip CSMs with the assistance, tools, and confidence they need to be at their best in front of their customers. Given his background in Design Thinking, Customer Experience Management, and Data Analytics, he believes in a highly interactive co-creative approach to a team's success.

The founder of InSyncCS, he enables your CS team by generating actionable data-driven insights along key touch-points in a customer life cycle journey. Data Analytics is at the core of the company, Design Thinking is in the veins. The mission is to assist customer-centric companies in attaining the next level of increased growth, customer satisfaction, and retention.