Scaling CS with a Digital First Approach

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Why digital success? This is the question that Teresa Chu used as a springboard to talk about Digital First customer success. Not a new concept, but the pandemic, audience growth, and now economic issues have created an environment where organizations are having to look at incorporating more scaling techniques. These techniques include the increased use of automation and customization to help scale and onboard our customers.

Aruba Networks started this process by take a deep dive into data. We focused on building customer segments, understanding the health and life stage and tracking use behaviors. Understanding what data you have access to has to happen early in the process.

Next came the process of mapping out the customer journey. This is a living document that needs to cover all phases of the customer journey. Mapping the customer journey was a direct outcome of the MVP (minimum viable product) process. It is a framework we adopted with the focus to produce the least/smallest amount of functionality to deliver a customer success experience to customers. The key components of the framework are a hierarchy of goals, epics, and issues with their respective owners. Tasks are complete in 2-week intervals known as Sprint cycles.

Thereafter began the content creation process. It is important to make sure each piece is aligned with your strategy and focused on a concept. They should help your customers understand the action or behavior you are asking them to engage in. This stage needs to feel authentic to your customers and should involve strong cross-collaboration with other teams such as Branding to ensure a cohesive experience. It all begins from the very first email.

Finally, watch your metrics. How are your customer doing with the program? Check your email delivery metrics, open rates, and engagement rates. It is important to test subject lines, visuals, and the use of buttons to see what performs best.

Remember that your customers are looking to engage across a variety of channels. Some mediums you can include in your digital mix include the following:

- Email
- Website
- Webinars
- Monthly insight reviews with usage, health indicators, and recommendations

The questions considered by each group were:

- What are some trends you see in digital customer engagement?
- What are some big challenges you see with your digital CS program?
- How are you ensuring digital CS ROI is being measured against business initiatives?

Key Insights and Takeaways

Customer Insights (Data)
- Voice of the customer program
- An example of an insight community and gauging the rate of customer engagement & response rates
- Looking at NPS, designed for consumers rather than B2B
    - Found challenges with using NPS but looking at things holistically
- What is the feedback on the customer's experience and what are they looking for?
    - Understand your personals and their specific needs/pain points
    - Make sure you are matching your communication to what fits their needs
- Use metrics
    - How does content and engagement help to support usage or platform adoption
- What other metrics are you using besides email?
- Data can be a limitation
    - Need access to more data on customer behavior
    - Look for out of box survey tools
    - Develop the ability to create health scores
    - How are you measuring ROI against business initiatives?
        - If you have a dedicated data team, they can attribute data to customer actions and tie it back to dollars
- Gather data on traffic use within an account and build up some automated marketing to engage customers on specific metrics

Customer Communication
- A focus on creating and maintaining the human element
- It is a highway of communication
    - Make sure you are getting the right message to them at the right time
    - Identify where people are at and meet them there
- Value adds for emails & customizations
    - Communicate platform needs and usage
    - Share software releases
    - Editorial style
    - Introduce employees that may interact
    - Develop an overarching email campaign

- Use videos in your emails (Loom is a great tool)
    - Include content and allow customers to absorb it on their own time
    - Can create an emotional connection boost between the CSM team and customers
- EBRs can be digital, and if you have in-apps to help, even better
- The flow from social media free resources to the website to the newsletter to low membership pricing to ultimately higher customer engagement
- Content can help remove silos between departments
- Social media can be used as a funnel with content and membership as well as drive strong resources
- There are so many new ways to communicate
    - How do you get away from email?
        - In-app messaging can be used for new feature releases, customer education
            - Quizzes embedded into the process can give feedback and correct behaviors in a less intrusive way
            - Catch them when they are actively using the product for highest impact
            - Often see better response and engagement over email
            - Be aware of bottlenecks that can occur with 3rd party apps
                - Strong internal training is a must to avoid or quickly resolve these areas of constraint when they appear
    - What will resonate with others and get them to engage
    - Customers are busy and inundated with email, you need to make the content more successful
    - Create self-service portal with videos and content such as Knowledge Base articles, FAQs, etc.
- Salesloft – create an email campaign designed to take work off the client (make their lives easier)
    - Make sure it is customized to each customer and focused on supporting the ways your customer is using your product
- Community tool
    - Builders can come into the discussion directly with customers – more proactive

Customer Learning
- Supporting customers in their programs have led to some good takeaways
- Doesn't remove a 1:1 relationship, but if you look at where information can be shared or gained digitally, you will free up more time for the direct conversations and have them more strategic focused

- LMS tool
  - This can support customer learning, but CSMs need to understand what information can be found there and help guide customers to the right place
- Ensure onboarding is strong and consistent
  - Can use tool tips to help with onboarding process through platforms like Skilljar

Technology Support
- More apps to facilitate endeavors and lead great product interactions
- Meet with product team to collaborate communication
- Need to have leadership engagement
- Allow for the building of infrastructure
- Use an MVP process in the beginning
  - Get to market with bare necessities and grow/modify the journey over time
  - Use a crawl/walk/run approach
  - Focus on the first 8 weeks on the program
  - Build processes first and then move into building the digital touches

In the end, you need to know your customer well to determine where you build in both high- and low-touch engagement in a way that is successful for them.

Teresa Chu is a full stack marketer with skills spanning from writing / storytelling, data analysis to program strategy and execution. Currently, she heads the digital engagement strategy for Customer Success at Aruba Networks. In her free time, she enjoys writing short stories, running, reading, and watching classical movies.