GAIN GROW RETAIN

**CS Leadership Office Hours**

Connect with B2B SaaS Leaders who are building and scaling customer success

**The Customer Success Operating Model**

with

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Leadership.
Ideation.
Action.

While other teams have a number of tried-and-true operating models, Customer Success has not yet developed a standard set of frameworks and models to help teams build and scale. What does exist lacks consistency and interoperability across different functions and teams.

Having a simple framework that can be applied at each stage in the customer journey can shift a Customer Success team from being reactive to more proactive. For example, providing a blueprint for the Sales Handoff process, onboarding, driving adoption and impact, renewal and expansion, put your CSMs in the driver's seat. Teams should create a plan for all of the stages within each of these processes.

There are 4 core elements in a strong operating model:

1. End to end customer journey that from the start of the customer engagement (marketing) through to sales, handoff to CS, onboarding, adoption, retention, and expansion.
2. Diagnose the customer journey and identify points along the pathway for conversations that need to happen at the right time
3. Drive the results through impact (the type that helps the customer and their company)
4. Identify events that impact your customers and how that impacts decisions being made

Your focus should be on creating recurring impact throughout the entire process, especially driving towards first value/impact within 30-60 days. If you focus on impact, minor issues with the platform become a minimum concern since the customer is seeing movement in achieving goals through driving strategic business impact.

Metrics are critical to demonstrate the value of Customer Success. It is especially important in times of economic downturn. Be sure your metrics are tied to organizational goals to show the value of your team. Measuring things like NRR are important but not enough. IF you just focus on Retention and NRR – those metrics are lagging indicators and it is too late to change anything. If you focus on the key metrics that drive those result, you can coach and improve those metrics to rive positive impact on end results.

What is First Impact? The moment your customer recognizes why they bought your product. Your goal is to get to that place as quickly as possible and then keep up the momentum to additional impact moments. This creates an engaged and 'sticky' customer.

**Questions for Discussion**

1. What metrics or key moments do you track today? What should you be tracking but are having trouble measuring?
2. What is Emotional and Rational Impact for your product/solution?

**Small Group Discussion Summary**

**Impact Information**

- Important to identify drivers that allows for change of focus
- Making sure you are identifying the impact for the customer is important. It might not be the same for everyone
- Have a strong CS plan that outlines their business goals, their operational self-sufficiently for change management and adoption
- Can be difficult to bring your indicators into alignment with customer value needs

**Metrics Currently Tracked**

- CSAT surveys after certain key touchpoints
  - Onboarding
  - Tickets
- NPS & NRR – lagging indicators, so need to be sure to tie these into impact
- Various adoption metrics
- Customer input when metrics are difficult to track, especially with non-software products which allows customers to share both data and emotional impact
- Health/sentiment
- Value gained
- Growth
- Changes in the business
- Product implementation
- Go live
- Adoption
- Expectations vs experience
- Sales volume to see performance and stability
- Revenue generating activities
- Learning and development engagement

**Emotional Impact**

- Helping customers go from feeling out of control to feeling like they have a plan
- Hitting that first impact quickly helps the customer feel like they are in the right product space for their needs