GAIN GROW RETAIN

Office Hours: CSOps

Customer Intelligence in a Proactive Customer Delivery

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Customer Success is all about customer relationships, but in the fast-paced environment we often find ourselves in, we can lose sight of a very important component of doing it well: proactivity.

In our June CSOps Office Hours, Mary Poppen joined us to help drive strategic conversation centered around the proactive nature of our relationships that are the foundation of successfully meeting needs and ensuring robust engagement with our company products.

So where does the proactive mindset come into play? While it is impossible to predict all of the areas you can apply this to, there are some key segments in your relationship that will be strengthened because of it:

- Discovery – taking a ‘wait and see’ approach here will very likely result in expectations that you are unaware of and therefore cannot either manage if they are unrealistic, or fulfill through your product. Early on in the process, ask questions, listen to the answers, and pay attention to things NOT discussed. While discovery is most often a focus in the early adoption timeframe, this should continue to be something you revisit throughout the relationship to identify changing needs.
- Data and metrics that help support customer goals – in order to guide your customers in full implementation of your products to meet their goals, you have to have a solid understanding of their usage and satisfaction. Data can help understand where there are gaps in usage that you can close through training and support. Key metrics are important in communicating the success (or areas of improvement) your product is having in helping a customer reach their organizational goals. Both are critical in understanding needs and seeing progress.
- Customer Education – continuously making sure customers understand how best to use your product or service through training, blog posts, webinars, etc. are critical in full adoption. Waiting until they ask how to do something puts you behind the curve. Using your understanding of goals, take a look at additional ways you can help them understand the breadth of what you have to offer, opening new avenues of implementation.

The questions our attendees were asked to consider and discuss were:

1. What data do you use currently, or wish you had, to be proactive and get ahead of customer needs?
2. Based on what you know about your customers today, what programs do you have in place, or want to put in place, to drive a more proactive customer experience?

During the breakout sessions, our groups had the following takeaways to share:

Data Needs to Support Proactivity

- Customer sentiment while using product
- Key user behaviors to build predictive score (likelihood to renew)
    - Product actions + NPS sentiment
        - Influences segmentation

    - Customers using the tool (backend integration) for engineering and execs to see how the customer actually uses the data
        - Drive empathy for customers
    - Data cleanup/reliability
    - Visibility: Re-org with sales to include expansion role that doesn't have access to CS platform
        - Sales needs to understand how CS leverages the data to drive daily actions
- Various industry tools
- Contact and contract information – get data out of spreadsheets!
    - CSM and Sales software integration for contract data
    - CS platform health scores can include things like:
        - Past due balances
        - CS metrics
        - Data from their own systems (conversions, usage, etc.)
        - Subjective data (customer sentiment, renewal likelihood) vs automated/objective data (financial, sponsor tracking, tickets, NPS, etc)
        - Attendance at training/onboarding sessions
    - Customer activity
    - Results our customers generate in our products
    - ROI
    - Data on CSM activity
    - How well are individuals doing
    - Coaching tools
    - Who is great at generating revenue
    - Who onboards people quickly
- It can be difficult to define how to quantify success/results for the customer, but it allows you to define why to continue the relationship
- Example – company incentivized maximizing time to value and decreasing onboarding time. Saw that customers that had the lowest onboarding times had highest churn rate and didn't have space to plan for change management
- Evaluating accurate success outcomes for customers
- Really understanding the red flags and what to look at during post-sale handoff so we can understand how to really drive value
- For self-service model, you need to really understand customer experience. Product led/product use case focus will miss the big picture around customer value. Customer success is key.
- Community data
    - Library views of knowledge base
    - Likes, comments, etc
    - More detailed data down to the client level to be able to track customers and users more efficiently
- Product usage data
    - Work with CS and marketing for tailored outreach to clients and cross-collaboration with product to drive product forward and drive insight
        - Have been refining and tweaking for the past year but wish we were more intentional with customer feedback data
    - Ticket data
        - Sentiment analysis around ticket
        - There is a lot of data but it isn't always used appropriately
        - There is often a lack of time to integrate the data well
        - Hard to pick apart what we already want to focus on
        - Health scores are not always accurate due to data gaps – there is a lot more nuance and outliers can impact things as well
- Clean data processes
    - Sales data feeding into a CS platform can make things difficult downstream
- Without a CS platform it is difficult to aggregate the data into usable information

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- There are challenges with engineering
    - A lack of internal support to bring the data from the product in the CS platform
- Using evergreen contracts
- Finding that ‘silver bullet’ metric that helps ensure a higher likelihood of renewing if successfully met versus being more likely to churn
- Content management resource tracking
- Content engagement data
- Analyzing what customers need to do in the first 10/30/90 days to stay on track

Programs Supporting Proactivity

- Customer rewards program to acknowledge super users, high health score, etc
    - Recognition/gamification for logins, key feature usage
- Customer community
    - Learning from peers
    - 1:M with CSM posts
- Intend to Renew survey
    - Can validate scorecard logic
    - Opens conversation to ask how we can make the long term relationship better
- Make sure the data we collect is useful and triggers actions (vs collecting for the sake of it)
    - Ask “who wants what’ to ensure the right people have the right data at the right time
        - Be wary of teams working backwards to use data to justify the conclusion they already wanted to find (are we learning from the data vs using it for confirmation bias)
- Create a story around the data when presenting to give context
- Customer advocacy programs which can also be integrated into an overall health score
- Customer roundtable
- Customer conference/summit
- CAB – customer advisory board
- Customer portals – in CS platform or native app
- Process to determine best contract process and templates
- Important to use data to understand the emotional story/human element behind it
- Proactive surveys to customer
- Outreach to customers around inactivity, usage, etc.
    - Utilizing heat mapping statistics to drive usage to areas that have dropped off, deciding to sunset sections of product
- Customer enablement
- Monthly usage against benchmarking
- Replicating the GS usage template for customers

Mary Poppen is the Chief Strategy and Customer Officer at involve.ai, responsible for driving the Customer Intelligence category in the market. She is building a world-class delivery team focused on helping companies leverage the power of Artificial Intelligence (AI) to become customer-centric. Prior to involve.ai, Mary was Glint’s Chief Customer Officer at LinkedIn and Chief Customer Officer for SAP’s Global Cloud business before that. Mary holds a Master’s Degree in Industrial/Organizational Psychology and has over 20 years of customer success, business consulting, and executive leadership experience.