

Create an Army of Champions with High Impact Communication

with

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**Leadership.
Ideation.
Action.**

CSM Office Hours

*Connect with individual
contributors who are working
with customers day-to-day*

We had the privilege of having Marc Phillips join us at our Gain Grow Retain CSM Office Hours to discuss how creating an army of champions can positively impact your customer satisfaction

Ask yourself: “Am I engaging with the right people, and have I diversified my connections?”

Every CSM has that one person, that champion, with whom they are strongly engaged. This is their go-to person, the one that they alert to issues, and the one they rely on to help navigate the unknown waters at their organization.

But what happens if that person leaves or moves to a new role that no longer includes your product? This can be a very dangerous time, as losing your advocate can open the possibility to churn when a need to cut back comes into play.

You need to have many arrows in your quiver at each company. Connect with end-users in as many roles and departments as possible and build a relationship with them. Help make sure they see your product as more than just a tool but as a partner in reaching their organizational goals.

Not only does this help make sure that as personnel changes, you still have a strong contact, but it also increases your understanding of the needs of the organization from a variety of angles. This can help you identify areas of need that your product can step into that you might not have been aware of before.

Remember: Our goal is to increase our revenue over time, which occurs when we can help our customers increase theirs.

In developing these relationships, you are not your champion’s top priority. Instead, their pain points and goals are where they live. You have to live there too. And in order to do this well, you have to truly understand the overall organizational needs and how your product is being used, regardless of where it occurs.

In a market downturn like we are experiencing where organizations may be looking at ways to cut costs, how would your stakeholders react if they were told your platform is on the chopping block? If you don’t know the answer to this, that is a problem. Have you helped your customers embed your product so deeply into their business practices (with positive results on outcomes) that the thought of losing it is devastating, or are you so loosely integrated that one platform is just as good as another?

So, how do you identify the power users?

- Look at your analytics (by the way, having access to data about who is using your product and in what way is a huge benefit – advocate for this if you don't already have it!)
- Reach out to your support team and watch the incoming tickets. You aren't going to respond, but it can let you know how an individual is using your product

Once you have identified the product users, reach out to them. Be sure to use the data you found about their use case, especially in the initial conversations. This is an opportunity to meet them where they are and show that you understand. Great springboard towards developing a partnership.

So what if your primary contact does not want you to reach out directly to anyone else at the org? How can you build your army if you cannot talk to them?

- Create tutorials about processes that they are using (remember your research?) and share them via email
- Do you have a community platform? Create a user group and invite everyone you have identified to jump in and share tips and resources there. Encourage them to talk about their pain points and their needs. Great information to help ensure full adoption!
- Host an Office Hours for all users and walk through some things that would apply to the broader group of attendees based on your research
- Begin the process of change management with your stakeholder. Try to understand the 'why'. If it is just a desire for control, this can be worked through by having them be the primary point of contact and sharing information through them. If it is cultural at the organization, you will likely need to be creative.

The bottom line is that people are unpredictable, and relying on a single point of contact creates a very weak bond to your customer organization. Work on strengthening that bond and creating an Army of Champions!

Remember – 1 champion = a single point of failure

Questions for Breakout Room attendees

1. What tools and methods do you use to identify users across your customer organizations that are most likely to engage with outreach?
2. What sort of outreach is most effective for starting conversations and building relationships with direct users of your service (and what risks can this create with your official champion)?

The breakout rooms shared the following key insights:

Tools and Methods

- *Dependencies*
 - What is the size of the customer?
 - What application are you working with?
 - Do you know how to find champions within the customer organization?

- *Tactics*
 - User referrals are a great way to get better initial outreach and develop the relationships on the customer success side
 - Talk to decision makers and utilize software (such as Pendo) to engage CS to drive analytics and conversations
 - Create partner networks introducing the CS teams to key people and expanding software utilizations
 - Early stage conversations on who would be the best person to lead the charge of implementing the software
 - The correct person might not be the person purchasing the software
 - Use surveys and target the right person based on the responses
 - Many enterprises see a significant turnover in the C-levels
 - Engagement forces sales to be aware of changing relationships and establishing new stakeholders
 - Capture the conversations and put a high value on the information that comes from them
- *Tools*
 - Salesforce – details on escalation, identifies end users and decision makers
 - Intercom – incoming support tool
 - Churn Zero – client usage, strategic proactive outreach

Effective Outreach

- Email is the most widely utilized
 - Reach out to new users as well as to those putting in support tickets
 - Focus on a spirit of outreach – you are there for them
 - Pendo & Gainsight can help scale larger organizations
- Automated engagement, especially for your more successful accounts
- Calling customers
- Screen record on Loom or Zoom
- Seismic to store your resources

Marc Phillips is a software service delivery and business strategy leader committed to creating customer value and fostering high performing teams. Currently, Marc works with global enterprises as a Senior Customer Success Manager at Mezmo, a log management and observability data pipeline platform.