

CS Leadership Office Hours

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

Leveraging your community with peer-to-peer engagement

with
Heather Wendt

Community Manager
@Gain Grow Retain



November 3, 2022 @11am ET

**Leadership.
Ideation.
Action.**

This week, Gain Grow Retains Heather Wendt led Office Hours with a focus on CS focused peer-to-peer engagement through community.

By providing the opportunity for customers to engage, many organizations saw that product questions were often answered within the community by customers. In fact, one organization saw 95% of support questions were being answered by community members, reducing the time to answer and the number of support tickets being created.

This reduction allows the support team to give more white glove treatment to those customers with unique issues that need to have direct support from the team and reducing those questions that are being asked and answered repeatedly.

Another benefit is that by having a place for your customers to talk, they begin sharing best practices with each other based on their personal experience. This can not only help customers who are working to grow the way they utilize your program but also result in strong use cases being shared out. By having your team monitor (and engage!) in these conversations, you will be able to identify advocates much more easily (who is sharing great info? who is answering questions?). It can also help you with content development. Use the conversations happening to create FAQs to make it even easier for your customers to find the answers they are looking for in a first touch way. You can also look at creating additional content based on what is being talked about. Does everyone seem to be confused about how to apply a particular component? Host a webinar and add that to your community knowledge base!

In a time where doing more with less is becoming the norm, the ability to scale your customer success reach through the community allows your customers to maintain a high sense of satisfaction with the help and support they need while allowing your team to focus on strategic partnering with your customers instead of answering low-level questions and chasing solutions.

There is a direct correlation between customer engagement and CSAT/retention. By offering the ability for your customers to build connections with each other and with various teams across the company, they are developing a sense of not just being a customer but being a part of something greater. The difference between going it alone with a company contact you talk to maybe one time per month versus being able to hop onto a community where you can talk to your peers as often as you want is invaluable.

One way to continually build customer satisfaction is through learning. A community allows your customers to have conversations and access resources that support user-growth at the level they are currently at.

By offering a space for your customers to come together with their peers and connect with the CS (and other!) teams, the CS team is able to shift their focus from troubleshooting to being more strategic with how you engage and gives your customer a sense of ownership of their knowledge and growth. Your customers are talking to each other somewhere...a community helps make sure you know what they are saying and are able to capture information and data to help drive support and development.

Some areas that can impact the overall organization are:

- Advocate identification
- Increased customer insights
- 1st touch support
- Org to customer relationship development
- Scalable communication makes it much easier for your customers to be in-the-know through:
 - Awareness of opportunities
 - Tips and tricks/best practices
 - System update announcements

After the topic overview, the teams broke out into groups and discussed the following questions:

1. Does your org have a community? Is your CS team using it currently?
2. How are your customers currently engaging?
3. What opportunities for engagement (and usage of engagement data) are you looking to add?

Here are the key takeaways from the groups:

Community Usage

- Mostly used for SMB customers who do not have a CMS allocated
- White glove customers are not included typically
- No due to management concerns about competitors and how it can help customers
- No due to events and conferences with no large online component
- Beginning to define and strategize what this means for the org and our clients
- Yes, and offers thought leadership, best practices, enhancement request opportunities, matching customers building communities based on interest and location
- Yes, but CS is not engaged currently
- Yes, and categories help to better direct conversations
- Some examples of strong communities are Trailblazers and Dreamforce (Salesforce)
- There is belief that community is the future

Challenges

- Can be difficult to break down silos within the org, but showing how community can help them and add value is critical
- There are challenges to defining ownership
- Maturity level isn't there yet
- Can be more resource-based, so active oversight isn't there
- Need dedicated resources to be successful

Current Customer Engagement

- Product ecosystem that brings everything together with different ways to engage with clients
- Webinars that can be prospect or customer-focused
- Visiting international expos
- Local events and conferences
- Strong marketing
- Training events and workshops
- Flexible customization that is flexible and fast
- The community isn't there to serve the product, it's the other way around
- Self-directed training
- Online forums
- Mentorship programs rather than a forum
- Be sure you are bringing in thought leaders and help people connect and/or build skillsets
- Early stage – possible marketing owned with support by CS team
- Late stage – possible support owned
- 1:1 engagement with SCM (EBRs, QBRs)
- Customer council, roadmaps
- Customer advisory board
- Coffee with an Executive to bring a feeling of a more intimate relationship

Future Engagement Plans

- Adding a dedicate community management department
- Connecting the internal CSM team to discuss customer engagement and various topics and problems
- Use current LinkedIn community to identify future training and meetings
- Provide value to the community (exclusive access to executives, feature development involvement) before asking for something of value from the community (engagement, referrals)
- Gamification can help drive engagement
- Pushing all things over to the forum such as product updates, Knowledge Base, Release notes as a way to drive user engagement in the forum
- Need a central forum that is easy to use
- Built up content with a smaller group before launching to the wider customer base
- Extract engagement data (new stage startup so no systems currently in place)
- Look at how to scale identified opportunities to engage
- What software can help track users and their behaviors
- Be sure to build out the products and its offerings to support and ecosystem for clients
- Add face-to-face client meetings on site
- Focus more on product trainings
- Touchpoints with the technical team are measured as well as touchpoints with the CSM
- All of our customers, on some level, want to speak to other customers and understand their use cases
- Utilize the community for references (pre-sales tool) and connecting clients with their equivalents from other customer companies

- Look at the data – what topics are they engaged in, what are they attending
- Can be a difficult sell when using the support team is free