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Class 1
Okay.
Hello, everyone. Welcome.
Thanks for joining us today. Happy Tuesday
class number one of CCO. School. We're so glad you were able to make it.
Hello, everyone!
Hi!
As we're getting settled and waiting for a few more folks to join us, it would be great if everyone could drop in the chat where they're calling in from and their Linkedin profile. So everyone can get connected.

And it would be amazing if you have the capability to day if you could come on camera. We love seeing your smiling faces.
If you're just now joining us, welcome to CCO. School, we're glad you were able to make it to day we're dropping in the chat where we're calling in from, and our Linkedin profiles.
Wow! We have people from all over. I'm seeing some folks in Canada, UK.
If you're just now joining us welcome to Cco. School while we're getting settled, we're dropping in the chat where we're calling in from in our Linkedin profiles. So everyone can get connected. We're about to go on an 8 week journey together, so we might as well be friends.
Wow! Look at all the all these folks from all over. Wow!
That's pretty cool lots from the UK. And yeah.
it's
Ross and BC. That ya good skiing there.
Hmm!
Nobody else from Hawaii yet, John, just you.
Oh, that's so cool. I didn't know you were from. You're in Hawaii, John, that's awesome.
Shouldn't Europe be asleep
right?
I was on a call earlier today, and somebody it was like 5 in the morning for them, and they were on a class, and I'm like I love the dedication, Sarah. I'm in Kansas City as well. That's so exciting.
I love it when I have my Kansas City friends.
So please continue to drop in the chat where you're calling in from, and your Linkedin profiles while we get settled here. But I think it's time we can go ahead and get started. I'm gonna kick things off today for us really quickly, so we can get all the housekeeping out of the way, and then get to the really good important fun stuff. Of actual Ccs cool. So Hi! My name is Kaylee Pryor. I am
part of the Pavilion University. Learn team. I'm going to be your host today.
So for the housekeeping things, as I mentioned before, it would be amazing if you could come on camera, we really love the interaction. And to see your smiling faces. Beyond that, this is an 8 week school. So we're gonna be together for a little bit here. If you have any questions about the school in general, please feel free to email in at learn@joinpavilion.com, or reach out to anybody on the learn team on slack. We're here to help you guys.
So questions during class, it would be great. We're gonna have some breaks in the presentation where there's gonna be obvious points for questions and comments. But it also be great. Anything that comes to your mind. You can go ahead and pop it in the chat. We love the interaction over there. And then just so we can
get some certification requirement things out of the way. Just so, we all know from Class one. The requirements for live classes are attending 6 out of 8, but you can also receive attendance for watching the recordings. And then cohorts. Make sure you all please sign up for a cohort session. These have to be attended. Live, and it's also a 6 out of 8 requirement. So those are the requirements for getting your certificate as well
as a final exam. But we will get to all of that fun stuff closer to class 8 recordings will be available. Post class into Shabo as well as the presentation dicks each week.

and we will be having surveys going out. I'll put it in the chat, and I'll be sending it out to you and slack messages, email all that good stuff. It would be amazing if you all provide feedback to us about how you're feeling like the specific class went any notes of things. You really loved things. You would like to be different. We're gonna give that all to our instructors and make sure that we're building great classes for you all.
but I'm gonna go ahead and pass it over to our dean and our instructor today to get started. Thank you all for joining us.
Great! Well, thanks everyone. I'm Emmanuel Scott. I'm super happy to be here. So I wanna welcome everybody. And this is really exciting. I am the Dean of Cco school, and what that means is responsible for the overall curriculum. I kind of hand selected the speakers and the instructors that you'll be seeing over the 8 weeks
built the whole curriculum and then have been working with each of them on content. I won't be delivering. I only be delivering one. One of the 8 classes. Maybe 2. We're still working on some stuff, and but I will be making sure that it all goes smoothly. And so why did I decide to do this? For a couple of reasons, I and John's gonna get into this a little bit more. So I wanna steal his thunder.
But I do believe that Cs is a A in a kind of a crisis mode right now, and is that a big influx? it? For the last 10 years it's been the kind of glory days assass, and that therefore the glory days of Cs and right now there's a lot of things that are being questioned. And so this is the time really to come, together with the group appears like this. Challenge. Some of our
you know, challenge some of our conventional wisdom, learn new skills. And really, this school is about elevating the role, the Cco. To be a role that is, I believe, actually well positioned to be the next CEO and so how? How do we collectively make sure that the value of the Cs organization, as well understood by the the board?
and by leadership. I've been in Gotomeet my whole career, everything from
say up being in the sales side as well as as well as in Cs and so I fully, very much believe in like sort of the full. Got to market life cycle and that sales and Cs, you know, combined our one Gotomo market team. I've had been fortunate to have a handful of great exits
most recently at toast where we IP owed in 2021 and I had led Cs from about 30 million to over a billion in revenue. I'm on the board of a couple of companies. As well. Everything from a public company to a a mature high growth company to an early stage. I teach at mit
in addition to teaching. This I teach at the Sloan school of business I teach an entrepreneurial sales. Go to market class. I do a lot of angel investing as well. And then, when I'm not doing all those things. I have 3 girls 2 are in college. One's in high school, and try to spend other free time. I do have being healthy. So that's a little bit about me. If we'll go to the next slide quickly.
I you know, the classes we talked about again are Tuesday from 3 to 4. You can join your small group discussions. Today, we're gonna be talking about sort of this, the future of and the connection with Cs and your company strategy. And as you can see the rest of the curriculum there. With some really really awesome speakers. And so we are excited to have you join us. For all of these sessions they do build on each other.
So hopefully you'll be able to at least watch the recording if you can't make it live.
And the next slide. And this is this is a new format, and with brand new instructors. This is our first time doing it.

So I do ask you to be patient. with us. But mostly we really want your feedback having started a class from scratch at Mit Sloan. Our first semester was good M. But the next semester was better, and the next semester was even better, and the next semester is even better. And so I do expect that we'll iterate based on your feedback. So you know, don't hold back
please fill out those surveys. We're gonna use it, you know. To improve both in this. You know what we can do in this class in real time. for this spring session. But as well for the future session. So we really really want your feedback. And with that I am so excited to be working with John Gleason. I met John, I mean, probably about a year ago.
because we both had very similar jobs, and John will tell you about his career. But we both had very similar roles. I was a lot of high growth, leading a very large Cs team, and very quickly we became kindred spirits, sharing a lot of war stories and thoughts and strategies. And so he's just the perfect person to be leading this for a session, and with that I'm gonna hand it over to you, John.
Oh, well, thank you so much. Manual. Yeah, I'm super grateful to be here today. We certainly have shared some war stories over over the last year. My face. I ran into a surboard last night, so not a war story, but nevertheless, I look like I've been in battle. So bear with me on that. I apologize for for your eyes, and having to to look at my face.
But this should be good content so hopefully all eyes will be on the content and not my face. So here we go.
little bit of back story on me. So I led customer success at a company called
Motiv. I joined there really early. A lot of people know that company has keep trucking. I join less than a million in arr and when I left it was a 300 million dollar err our business. So I have the kind of unique vantage point of seeing how this post sales customer success function
scales at really every stage of growth. And I think that's really important to keep in mind as we go on this journey with the Cco. School, because, in my opinion, customer success really evolves with the company as the company evolves as well. So II can kinda take that lens. I was also at a very early stage company joining pre-product market fit. So I know that part of the journey. But
we won't be sharing too much of that in this course, and then finally, I really love this world of customer success. I host the world's largest meetup for customer success. We do them in San Francisco and New York. Our membership is 5,000 people now. And so that's put me in contact with some of the the best customer success leaders out there, and I've had to, you know, had the opportunity to learn all
side and as well. So I'll share some of those experiences as well. But let's get into the content. Here I have
my chat on them
on another monitor. Feel free. I'm gonna be, you know, monitoring both screens. So feel free to put questions in the chat. I'll be watching it. We'll have opportunity to come off of a microphone as well. But if you like, if if something really urgent pops up and you just like, have a dying question.
I want this to be interactive. I know it's a big group, and you have to watch that but I really want it to feel personal and and interactive. So feel free to raise your hand on the chat, or or even just a interrupt, if if if you absolutely have to.

But let's get into it. So here we go. I'm gonna start. I'm gonna break this class into 2 kind of sections. I'm gonna move through the first section rather quickly. We give a brief history of customer success. I think that's important, because if you don't know where you came from, how do you know where you're going? So I'll go through that really quickly, and then we'll get into 5 tactical

skills that I think every chief customer officer needs in order to be successful in this current environment.

So let's do it alright. So we all know this story. We all consume our our music differently. Post cloud. We all consume our software differently. Post cloud. But really like, in my opinion, the customer success story really begins when we changed how we buy software, you know, in the old days, and really, not that long ago.

when we bought software, we used to buy what's called on premise software. Right? You would fire up a bunch of servers. You would even buy on a CD. Or a disk, and it would be a one time sale. Well, that all change right when we could access our software via the cloud. We didn't need to have that physical copy anymore, those physical servers anymore. We could have. always on software where the way in which we bought it was

not through buying it one time, but by buying it many times over. Right? So it changed the way in which we buy software. We can now buy or consume that software via a subscription or via consumption as well. So we can all think of those things in our personal life. From, you know our subscription to spotify. Now we don't buy Cds. We subscribe to spotify, and we we license that music that way

or through consumption base right? All of us are familiar with aws, and how we can, you know, develop things without servers. We just fire up what we need. But the important piece of that is that

it really shifted

the buying behavior right? It really shifted the the sales behavior, because now, instead of the seller having control, the buyer was in control. Right? You have that choice to not renew. Should you choose? If you weren't getting value out of that software we didn't have to renew, you know, I think sales always gets a bad rep, because in our heads

we

we think of it as like that that use car salesman on a lot where it's like you walk off the lot with that lemon of a vehicle, and there's no turning back right? The power is in is in the sellers hands. Now it's a little bit different. Right? Oh, sorry somebody's iphone. Yeah, there we go. Just pause that. Thank you. But now the the power is in the hands of the buyer. Right? You can choose not to renew. And so businesses, companies they really had to adjust

to this shift in power and actually focus more on making your customers successful. You needed to make sure that you know the reason why your customer signed up for your software. In the first place. They were getting that. Why, they were getting value out of it

right? And so if I just click through here just like reiterate. That first point, you know, in the old world of sales. We talk a lot about bookings right? One time. Buying. And the way you grew is just growing those bookings. But in the new model we have all of these different revenue streams, and it's only when those revenue streams start to stack on top of each other that this whole business model starts to work right? So you have your new AR.

But to get this curve going you also have your renewals, that stack on top of that, and you also have your expansion that stacks on top of that. And it's all of those things coming together, that that subscription selling starts to work. Because if you think about it in a lot of ways, you know, in that old world of bookings you captured all of the revenue upfront. There wasn't a lot to sell after that. You sell that car. It drives off the lot.

Deal is done in this new world, you actually forego sometimes a little bit of that revenue upfront in order to capture it on the back half. And the only way that you really recoup, that is, if you're really good at a those renewals, and you're pretty good at those expansions as well. So it really shifted the way in which we consume software and the way and we sell.

and also just the overall go to market strategy.

And so customer success had a big part to plan that. That's really how this all came to be. And actually, people overall had a big part to play in this shift right? There was a ton of change management that went with this. There was you know, an accelerated focus on training and onboarding. You needed to really deploy your integrations quickly.

And your time horizons really started to condense because you had the weight of the renewal always on your shoulders. Right? And so it wasn't. Hey? We can sell them this software, and you know, over the next 5 years will will amortize and we'll get them going, and then we'll just sell them, you know the latest upgrade. Who cares if it's shelfware, and they never actually fully deploy it?

No, no, no, because the renewal was kind of always looming. It really forced us to get involved and move the the value or really push

customers actually using that software and finding value in it along rather quickly. And the first way in which tree did this, I would say, like Sas. V. One was heavily. People focused. The software wasn't quite there yet. So we did a lot with people, and in process

an entire category was created around customer success. But I would say, even before the customer success platforms came into interview. I like to credit salesforce I've I pulled, I went on my bookshelf, and I pulled off some old books, and you should definitely go back and read these. But you know a lot of the Gotome Market

strategies that we all kind of take for granted now that Sdr. That marketing, that Saas selling playbook like they all came out of salesforce. So there's great books. Aaron Ross wrote a really good one on basically str, it's called predictable revenue. It's an Oldie, but a goody. Another great one is impossible to inevitable. So you can. You know, you can add some extra reading into your book. But really,

yeah, in process these categories around task selling, we're we're created customer. Success was one of those things, and kind of the the story goes. Things were humming along quite nicely at Salesforce when all of a sudden they realized, Hey, the bottom of the bucket is falling out. We are have a crisis at Salesforce. We're not renewing our customers, you know. We put all of this effort into prying these customers away from on Prem systems like Siebel systems, and we've gotta renew them. So they all got together in Half Moon Bay, California.

at their off site. And out of that meeting came the the term customer success, customer success managers. And so that was really like the let's call like the the birthing of customer success. And then along came platforms like gainsay. And I really I really always like put gainsight up on such a pedestal, because I feel like I've experienced a great career because of the category creation that they've done. And

you know, really, the millions of dollars of marketing that they've done to create this customer success category. And so that's also shape the way in which we think about customer success in which we go to market? You know, in the in the Old World, or in this, like Sas VV. One. Let's say it. The way in which you grew is adding seats. And so a lot of what we've been taught is to do things
with people first. That's that's been a good growth tactic for the Csp and I think in some context that's still good advice. There's certainly people that go into met into the mix.
But
we're we're changing quickly. Right? We all went through this. Get lean sentiment of the last couple of years, and we have more tools at our disposal as well, and that's meaning that customer success organizations have to grow, not just in terms of people, as we've been taught for the last 10 years.
but in a lot of different ways. So there's this rise of product led growth motions. We also have like better software. You know, AI is meaning that we can deploy software. We can write software at faster pace than ever before. So some of those technical modes if they've been eroded
in the shift from on-prem to the cloud. Well, they're accelerating even faster now. We have more automation. We have just more educated buyers, quite frankly, too. And so that's forcing us as host sales leaders to evolve rather quickly. And so now, when I think about the skill set of a Cco. In 2024, based off of where we've been and where we're going.
You really have to have a more dynamic set of skills to to navigate this landscape, and you have to pull all of these tools off the shelf in order to build a customer success team that really resonates with what's required to be successful now. So in this class, like, you know, we'll we'll talk about all these things. But margins margins really matter right? We're all dealing with reduced head count, reduced spend internal budgets are are stretched more. So we'll talk about margins, increase competitive per pressure as well. You know. A lot of us, maybe, are at companies that tell a point solution. Well, there's been a lot of consolidation, right? So we have to think, hey, where does our software fit in the stack. How do I renew that? Where does it fit in the mix?
And then as Emmanuel said, off the start, there's this negative sentiment right now in in customer success. A lot of people maybe think that we are like a Zurp era
phenomena where the only reason we applied so many people to this is, there was just a lot of free cash floating around and I don't think that's true at all. And I think it's our our responsibility actually, as as people and customer success to to correct that narrative. But also to do better as well. So let's get into some of the skills that we're gonna need in order to do that.
And I guess before we go, the fact remains is most of revenue still lives with us on the post sales side. And Manuel, you know you. You know this. Your number was probably the biggest number at at toast. When you add up all those renewals, and same thing for for me, up mode of my number was 300 million dollars in the end, and the only person who had a bigger number was
the person I reported to, which was the Cro, who just bolted on a little bit of extra sales on top of that. So?
Really big number. And it's really important that we take care of our existing customers. So let's do it. You could check the chat quickly, too, as we go.

Alright. Yeah, I love it. I love what somebody said. David Dempsey. Dr. Do love it.
You read you read the book. I've got it right here on my desk as well. I love that.
I had dinner a little while ago with with some of the people that were in that room. And so it's cool to get like the story behind the story.
Alright.
And so yeah, just recapping most of the errors. It's post sales right? You see the big box around that expansion and renewal. Once you really cross about 3 or 4 million dollars in sale, that machine starts to compound, and your number actually, sooner than later, is is one of the bigger ones in the in the business.
Alright. So
before you build your customer, success before we get into these skills. I wanna just like, yeah, just do a little like tongue in tong tongue, in cheek. Experiment here. Alright. So there's many flavors of customer success, right?
and it's funny, like, you know, we talked to all sorts of different customer success leaders, and we talked to 10 different customer success leaders. Chances are you're gonna get 10 different explanations for what they do or what goes into their motion. Right? And this used to drive me nuts, I used to think like, why like, why can't we just like agree on one way of of doing things just like sales sales, you know my opinion. They
they're incredible part of the organization. But we talked to sales leaders. 10 sales leaders are gonna give you the same more or less playbook. And in Cs. We just haven't converged on that yet, and it like I said it used to bother me but in reality. I don't think we're ever gonna narrow in on that that one concurrent playbook
like sales. So sales, you know, the funnel awareness, interest, desire, action. Boom done deal you close the deal. Not a lot has changed in in that motion.
We all know this right, that forecasting everybody's seen this in salesforce, it's it's the same pretty much in every business, but in customer success
it looks a little bit different. And the reason, I think, and we'll get into funnels in a minute. But the reason I think it is is because we have so many different funnels in in customer success.
and I'm gonna actually hold this question to the group for a minute. We'll get into funnels in a minute. And we'll start to align what this looks like. But there's a lot of different ways that we can move customers along their journey in customer success and customer success really fits to the needs of each individual organization, right? And so those are just some of the the funnels. We'll get to that in a minute.
But each organization is different. Alright. So due to the diverse range. So all those different funnels customer success is gonna feel a little bit different. And that's okay at each business. And also just the quirks of the organization is is gonna guide. How customer success ends up looking. And again, we'll get into this in a minute. But just like I wanna, I guess, like the big takeaway, the concept that I want you to get as we go into it is.
I think it's okay. Or I know that it's okay that
2 different customer success teams at 2 different companies can be doing 2 different sets of activities. And that's okay. So the biggest concept here is, you know, just don't feel like you're doing it wrong. If you hear another chief customer officer say they're doing it a a different way than you. These things really fit to to each individual business. I'll I'll give you like a little anecdote on that, or how I came to realize that II made a point to talk to one other

Vp. Of customer success or one other Cco. Each week when I was leading at motive, and I would sometimes read their blog posts right, lead their read their Linkedin post, and I would sit there at home thinking like jeez man like, why is it that I don't get this. How is it that everybody else has this figured out? And then I would
actually talk to the person and say, Okay, tell me the real story, and they would tell me the ins and outs and the quirks, and why they built it in that way, and the the uniqueness of their business. And so I started to realize, like, Hey, really, you have to
fit your post sales motion to the unique needs of your customers and your business. So yeah, big takeaway know that it's okay. 2 different Cs organizations may, in fact, look entirely different. And that is okay.
And so let's lead it to that. The best customer success team is the one that matches the needs of your customers
and your organization right? And so there's lots of factors that can go into this right
contract value. They can be high, they can low
product, complexity. This can change how you build your customer. Success, team industry, expectations. Right? Emmanuel, you spent a lot of time bringing quickserve restaurants online for the first time. Their aptitude for technology is really really different than if you're selling software to software people. We did the same thing at motive. We brought
one in 4 trucks in America online. For the first time. Our customer base didn't even have smartphones. They were operating on flip phones. There was a whole different set of expectations that we needed just accommodate in our in our motion, and that was a rude awakening for me. Actually, when I when I really got down to business there, customer journey goes into it again, like, you know, they didn't even have smart phones.
And then also your go to market strategy as well. Some businesses will really deploy a land and expand motion, others will be more enterprise. Big deals upfront, others will be more product led. So again, you have to be conscious of all
of these things coming together and fit your customer success, strategy to all of these different factors. And there's even more than this truthfully.
But in order to do that, I think that you need these 5 big skills. So what we're gonna talk about now for the remainder of the class is number one, saas margins number 2. We'll talk about market segmentation
number 3, customer journey and mapping number 4, funnel optimization. I think this is a really important skill in modern customer success
and number 5 just your organizational orientation at large. But I'm gonna pause right there. Again. Just for a second. Any any quick questions in the chat.
Cool. I'm scanning. I think we're good. Okay, cool.
Let's push on.
Alright. So let's start with gross margin. I think this is I don't think a lot of Cs organizations actually start at this point. But I think this is the backbone truthfully for building a customer success organization in this modern environment. So what is gross margin so gross margin is, how much profit you have after subtracting cogs. So the cost of goods sold
from revenue now in a Sas business and and spend some time googling this.
you know, if you took accounting in in college,
it looks and feels a little bit different for a Saas business, and let's say a man it

a manufacturing business like we all got trained on in in accounting but, in short, really like. The formula, here is gross margin equals revenue minus cogs
all over revenue times 100. So that's a formula you gotta stick with. Now let's talk about that cogs piece for a moment. Alright.
So
on your income statement. Okay, in a in a Sas company, you're gonna start to see a number of different happening. So off the top, you're gonna see revenue
once you get below revenue. And and I'm really generalizing here. You talk to a bunch of different Cfos and a bunch of different auditors. You'll get some different opinions on this. So really, General, you'll start to see revenue, you'll see cost of goods sold, you'll start to see operating expenses. Now, you'll notice here I blocked out
customer success in 2 of these buckets right? Because you'll see customer success get classified under these 2 headings more often than not, sometimes in both of them, sometimes in one. But how and where
Cs gets classified.
actually really starts to fit into the needs of the business, or a deeper understanding of the needs of the business, and then also how you should be thinking, or maybe rethinking about what and where customer success fits in. So let's talk about customer success in terms of cogs. And let's talk about customer success in terms of operating expenses.
Alright. So first, let's just like lay down the definition of cogs. The cogs is things like the way I like to think about it is things that you're gonna have to spend money on, regardless of. You know how many units you sell. Okay? So supporting your customers, professional services training, fixing those bugs, but that can even be, you know, bigger things than that. So cogs, on the one hand, alright.
and a lot of things that we do in customer success fall in that
cogs category. On the other hand, we have our opex expenses right? So our opex expenses. I like to think of this as like more variable in nature. In other words, let's say, we're growing really fast. You know, these things really accelerate that growth. They're part of the scaling function of a business right? So this can be expansion or leading expansion. In some cases, and this can be a for debate. It can be retention, adoption, even building a relationship
with the customer, for that matter, can fit in this opex category. All right.
okay.
I see a question, would it be interesting to do a poll here? My company considers success as cogs. I'm gonna get to that a minute I love. I love that. Let's not do a poll but we can have some discussion on it. And I'm gonna leave you, maybe with a couple of tools in a second. Alright, so just. We're all clear. We have cogs, we have OP-eds. This starts to fit together. Where does your customer success piece fit in
alright. And so here, Emily, this is maybe going to your piece. So the first litmus test that I really like to run is whether our company is
cogs or opex, or a combination of both, is, ask yourself this question.
if you had to eliminate customer success entirely, and through 2022, 2023 some companies did do this, and they maybe found out the hardware who would take over that responsibility? Right? Would it be support.

or it would be? Would it be sales. And when you start to unpack that, and you start to think, okay, who would take this over? That's where, when you go back to here, you start to understand. Okay, maybe X percent of my business
is
cogs X percent of my business is opex.
so just understanding where customer success fits into the mix, I think, is incredibly important, and it starts to frame again the playbooks, the strategies that you need to be optimizing for.
And so let me introduce another concept here, because I think this is super relevant, particularly in this landscape right now, where
we've seen kind of like 2 worlds over the last 5 years, right? We've seen the growth at all cost mantra, where it's just throw money at and let's grow, grow, grow. And then all of a sudden, like the pendulum swum, and all of sudden all companies were talking about was, Get lean, get lean quickly. It's all about efficiency. It's all about efficiency, right. And so we saw this like steady shift. And in that mix I think that a lot of organizations actually kinda missed the mark. They they swung the pendulum
too quickly. But really, what we should be thinking about is what's called rule of 40. Okay? So rule of 40, is a concept that a lot of Vcs will use to understand just
you know how well overall a company is is doing, how well they're growing right. And so what it is. It's a principle that basically is your combined year over year revenue growth
plus your margin. All right. So let's talk about that margin piece. We went through that margin piece a minute ago where you fit customer success in the mix really impacts that margin. But then, also, when it comes to the growth side of things. You see how customer success can kind of fit on both sides of this equation. Alright. But, in short, what rule of 40 is is that your over your revenue growth percentage plus the margin percentage. And then when you add those 2 things together.
so long as you clear 40, or if you clear 40% that's deemed to be acceptable, you're not gonna run out of money anytime soon. And anything above that is is good. Right? So you always wanna clear this hurdle of 40% combined. And so let's like play this example right? Your revenue growth is 15 and your profit margin is
20. You only have 35 here, so you didn't clear that hurdle. Oh, no, you've got some work to do. You either have to grow faster.
or you have to grow more efficiently. And so, if you just like, kinda go up to the top here and we understand where it classified, those are kind of the the big rocks that you should be thinking about when you're building your Cs organization. Either we have to cover more of these costs. We have to grow more efficiently, or my team needs to do a better job at that sales side of things, that expansion side of things. So let's just toggle gear.
You know, the the big takeaway is that in order to grow, or in order to achieve this role of 40, you basically have like 3 levers to pull, you can either grow faster.
You can get more profitable, get more efficient, or some sort of balance between the 2,
and I think, like getting in tune with where your company is at is really really important. So if if I were to say like, what is the big takeaway from this slide. It's get in tune with the stage of growth that your company is at. In a couple of weeks we've got the head of, or the first head of customer success at Openai, on a panel for for a meetup that we're hosting, let me tell you like right now they are not thinking about

the margins right? They're trying to capture lightning in a bottle. They're probably okay because they're in this high growth mode. They're probably okay to do things that maybe are less than efficient, right? Because they're just trying to like capture this lightning in a bottle. II mode of one time we went from a million in AR an AR 60 million in AR in the span of 6
months. It was like incredible growth. All at once all that was on my mind was just.
you know. Let's let's just solve this problem. Let's just, you know, get ahead of it. If it means we're not super efficient in the short term. That's okay. We'll worry about that in a minute. So get in tune with where your business is that? Conversely, you know, Emmanuel, like. You know this as you went public, there was a whole push to be more
more efficient. Right? You had to show to to Wall street to investors that efficiency and growth. We're we're top of mind to you. So you probably adjusted and had a little bit more balance playbook when it came to to rule a 40, and that bleeding into what your teams were doing, and and and either how efficient or how much gas you put on that growth side of of the business. So I would say.
rule number one, just get in tune with the margins in your business.
spend time with your Cfo.
And really align what you're doing in customer success to the growth stage of your business. There are times when you can be less efficient. There's times when you need to be more efficient. But
if you build for a growth world and an efficiency mandate at your company, you're going to fail every time
inverse of that is absolutely true as well. To really get in line. Understand the margins, spend time with your Cfo. And
know where you fit on that income statement and then run it back up the chain with that rule of 40 as a principal.
Alright.
So next thing that we're gonna do, we're gonna go into market segmentation alright.
So I think market segmentation is really important. So thinking from that, the perspective of just margins
one of the first places that I see companies start to go astray with their Cs strategy is
they don't hit those efficiency or those margin metrics, or even maybe those growth metrics because they're aligning the wrong strategy to the wrong segment. Alright. In other words, maybe they're using an upmarket.
strategy for a down market customer base. Right? So those 2 things don't align. If you don't align your strategy to your segments, you're never you're you're never gonna fit the or fit into those efficiency gains. Right?
So let's just like get a definition. I think all of us have gone through this at 1 point in our our current. So pretty senior group. But just market segmentation involves dividing customers into more manageable segments based on shared characteristics or behaviors? And you know, why do why do we do this? So I talked about, you know, just
the efficiency side of things or the margin side of things. But also it just allows us to be more personalized overall. We can align the right motion, the right message, the right set of people to the right customers based off their needs it also.

le, let's you know us again, align to their their needs. So what I wanna do is there's lots of ways that we can segment. Our customer base lots of businesses will do it in different ways. I wanna break out into a first exercise here and just either come off mute
and share a way in which your company segments. It's install base, and then list one pro or con, because I think again, knowing where the pros and cons start to fit will really help you again. Understand? You know where you build from here. So
anybody wants to try this. Feel free.
Bueller.
you would use AR sorry.
Yeah. AR AR AR. So AR is a great way. Now, when you mentioned arr, are you thinking like current AR or future AR
current err. So we break them to different ratios
based on current a R. Art. Yeah.
okay, so tell me one pro of when you segment on current err. What's one pro of that?
And, as you say, you can, you can align your your motions to the customer. So if the digital customer journey for the micro merchants to smaller merchants. You'd have a a more.
a more engaged strategy for your corporate or your enterprise customers.
So for assigning the correct resource to the, to the account
based on the resources expertise and their seniority.
Yep, now, what's what's a con to that? So you're aligning your resources to the AR that they're paying now to summarize. What's a con to that?
And II suppose this you could end up with a fast growth customer stuck with a digital engagement strategy. And you just need to be reviewing that very regularly.
Absolutely. Yeah. So that's one con. I love that
you can lose a lot of dollars if if you don't, maybe pre invest in in the motion to where they could be. Jen.
Thank you? Ii think that was Patty, was it II couldn't quite. Oh, thank you very much, sir. Jen, what's another way?
Is that me jam
exactly how you doing? So there's there's 2 ways actually done
One was by the size of the company, cause we found that the size of the team really impacted like what their journey was, what their reports. They needed, what they were actually needing from the the product versus when it was a really small team, you know, and and people wearing several different hats, things like that. So we we were thinking more in terms of behavior.
And in that case, there was only a slight difference in the tier in terms of what sort of AR and how important they were to us?
And so, and I really kind of classify it by behavior versus tier, which is, what can we afford to spend on them in terms of the buckets I put them in, and then the other was we found that the real, the root of the behavior was
how familiar they were with technology, and if they were going to be tough to transition over and change management versus others who really the change management was more about that they were so used to another type of technology that their frustration was using our tech, which was different from the motions they were used to. So because they were 2 different types of sort of change management journeys.

and otherwise they were all pretty much the same tier again.
That's kind of how we, the the different buckets we put in. But I've also found that they can be in the same sort of journey, but as a tier, that they're different. So because of that, then some I would give a digital journey. But it would just be the same journey as another that might be enterprise. And I'd be doing with a named Csm.
yeah. So here, I'm just gonna speak that back to the group cause there was actually 2 segments 2 types of segmentation listed there. First was just the number of seats. Or I,
let's call like the the expansion or the total size. P, potential. So the yeah, the con of that is, sometimes you spend more money
when you haven't captured all of those seats quite yet. But you you take the risk on it, and you assign a growth maybe
you over assign Cs resource to it, even though your AR might not be there. You know, the potential for it is is greater. So the con is maybe over spending the pro is you can lean into that expansion opportunity. That's actually what we did at motive at motive.
we had this resource, and we knew the size of every trucking company in America. We knew how many truck drivers they were, and so sometimes we would have you know Walmart come in. Walmart would buy 10 seats. Well, we knew it was Walmart. We knew that there was 10,000 truckers in their fleets, we would all of sudden tap in and start to run our enterprise playbook on them.
And II miss. And so, yeah, that's really good. And then customer charity as well. Right? That also factored into the motion or the onboarding motion that we would. We would apply to customers. You know how mature where they did. They had they done certain technology things before? If they had, we knew it was gonna be easier to serve them. So yeah, Jenna just reiterate. I love all of that. I'm looking at the chat here.
Benjamin, I think we're singing from the same song song sheet so akin to what Jan said around company size. Ii really agree with that. That would be my my first choice. Mike, Mike says, based on how accounts are segmented for sales coverage should be reflective of the potential account. Yeah, I agree, I think.
On the Cs side
you should really align your segmentation to how it's done on the sales side, especially if there's a big land and expand motion. At play. We're not gonna cover anything around expansion in this course, but I found when your segments are very similar between sales and customer success. It works in your favor because your Cs people and your Aes are more easily able to collaborate because they tend to work with the same aes and Cs combinations over and over again. So, yeah, Mike, I really like that. Complexity. Yeah, that's another one.
Arpu. Ltv, analysis. Yeah, I like that as well, particularly in like vertical selling. So today in this class, we've mostly been talking about more like horizontal software solutions. But yeah, average revenue. So Arpu average revenue per unit
I think is really important. That's another way future size, Steve, I see that here. This is really good kind of in in the same bit that Jen had introduced. Great. Yeah. So I would say, like big takeaways on this
be flexible on your segmentation. Work across your company. But know where those segment lines lie and know. A. The arr that could lead to on the other side or the current AR, because again, you don't want to apply emotion or a set of tactics. That

aren't too expensive for for that segment. So that would be the big takeaway is, I love the the comment that was made off the top think through in terms of dollars or potential dollars that could be spent here.
Alright, I'm gonna move through. This now really fits into your customer journey mapping alright. So a lot of companies will have one journey map. But a lot of companies will have multiple journey maps as well. That motive we
did our segmentation around the potential that each fleet could become. So. We knew how big they could become, and we had 4 segments. We had Smb. Which looked and felt like a commercial or a consumer business. It was really, like, you know, contract size about $1,000 a pop.
We knew that they could never grow super big, but it was an important line of our business. We had 150 million dollars in Smb. Then we had commercial which had kind of the needs of our big customers.
but we couldn't afford to spend on them. We had mid market where we could actually kinda do that traditional customer success motion that most people are familiar with. And then we had enterprise which was really the full core press. It was a segment of the market we're going to. So we had all these things segmented around the potential that these customers could become, and we also had 4
different customer journeys, sometimes with overlap, but 4 different customer journeys that we were running with each of our customer
segments. All right. So know that you can have multiple customer journeys. But in short, customer journey mapping. I know everybody probably knows the definition for this already, but customer journey mapping is the process of visualizing
understanding. The various touch points and interactions. Customer experiences with a brand throughout their life cycle with the aim of identifying a
key. Milestones. So think adoption, advocacy, expansion, modes of communication. Alright. How we communicate with them, how these things are delivered. So email product people and then areas where personalization experiences can be delivered to enhance that overall experience. So
I like to use this template for my customer journey mapping. And I think it's really really important that as you build out your customer success team. You have this, I
on efficiency or margin. You have a deep understanding of the segment, and then you go through on a segment by segment basis and really list out at every stage the things that are happening. So what are the customer activities? What are the customer goals? What are the key touch points the experiences that the customer's desiring the business goal. So your goal, what you're trying to get as a business, how you measure it.
the organizational activities. Alright. So just cross. Functionally, Cs is not in a silo. So organizationally, how do we coordinate as our business? Who's responsible for that? And then I like to include, like the technology system that is the backbone of it. Or how do we deliver it? So let's do this. Let's pick
let's pick a part of the journey. Let's let's do, maybe adoption and start to share with me. So put it in the chat here, and I'll read it out and we'll just get everybody. But like customer activities. customer goals, touch points, experience, business goals. Kpis, just lifted list out some of the things that might fall under each of these categories, and I'll read them out and we'll start to add

color to this. So I'm gonna turn. I'm gonna watch the chat. Let's interact with this template for a second.
just as we do this. Dave had a question. Did you have a separate leader for each customer journey, slash segment, and if so, did they own each journey and playbook? Or did you own it all? That's a great question. So as we're writing in the chat, I'll answer this
orally yes. My organization was very large at at motive. We were responsible for 130,000 unique customers. I had Vps and or directors
over top of each of those segments. So smb commercial mid market and enterprise. So yes, there was. There was leadership there,
ownership of the journey.
I would say we didn't have complete ownership of the journey, nor should we. We would come to the other parts of our organization
so marketing sales, and we would work with the respective vps and directors there to really align around each of these things, and where this like really came out, was actually in our annual planning more often than not where we would
identify gaps in our customer journey needs
from other parts of the organization or responsibilities that we take on. So I wouldn't say like we owned the journey overall. But what we really went front, foot forward on, was coming with this template
and calling out where the opportunities where the deficiencies were and where the things that are going really good are in our organization. And and when we're in that annual planning, we would make sure that we kept funding funding on for the things that were really good. We either got funding for ourselves to fill in those gaps, so we would take a bigger push or own part of that journey.
or we would ensure that we were supporting, let's say, our marketing department
in acquiring additional resources to own a part of our of this journey. So, for example, like in Smb around adoption. We needed to do a lot of drip campaigns in Marketo, and so we would always go to bat with our Smb. Marketing leader to make sure that they're funding for Marketo was there, and also that they had a resource dedicated to this segment, and we could collaborate on all of those campaigns. All those drip campaigns with them
thumbs up, thumbs down, Dave, did I get your your question
cool?
Mike says, why don't you start the journey Pre sale? I think that's really important. Yeah, yeah, we're talking post sale here. But it certainly should start pre-sale as well. We actually started to bring in customer success people. As we were closing deals. And so there was some mapping there.
Ash says I would also call out onboarding as a separate moment in the journey, apart from adoption.
Yeah, I agree. How do you? Maybe come off Asha maybe come off mute. Tell me a little bit more about that. II think I agree with you. But tell me a little bit more.
I think in assas environment. You wanna make sure that the customer is has all the access that they need understands where to go for information. Just sort of the
the the the details of how to engage with the product.

And then you can, you know, and then they can get going on the adoption. But I think it's important again, especially in the Saas environment, to kind of isolate that
front end, to ensure that they have an understanding, or whoever the user is going to be, they have an understanding of
what's needed to engage with the product. And what? And from a champion perspective, what's it needed to engage with the program. And then kind of isolate that and then separately start evaluating adoption.
Yeah, I think I think that's a really wise comment. Ii always included onboarding as part of that drive to adoption as like a a function within that greater adoption, let's say part of the journey. But you're right. It's such an important part of of
you know the the overall journey that it's worth calling out, and so like, I would totally be in support of of doing that. I think what you said is super wise. So yeah.
good call
I also love, maybe share with the group here. This is another really wonderful comment understanding what is considered first value for your product and highlighting that activity I love that can you share more about time to value or first value with with the group. I think that's a there's a key milestone or a key. Let's call it
customer activity, and adoption, but share with the group. II love that.
So you have a line item here. Under the stages called customer goals, which is incredibly important to call out across the program. But I think, as the company as the Csm.
It's important to sort of curate that customers journey, and even if you have to, I won't say Well, I'll say manufacture, but you know, create moments along that journey where you're highlighting for the customer that they are, in fact, moving forward, because if their goal is something they're not gonna get for another 3 months or 2 months.
That might not be as helpful. That allows cut the competition to kind of get in in the way. So you know I did. Going back to onboarding for a second, you know, knowing what is considered on boarded.
Maybe that's your first when you get your first value, but it it depends on the product, right. I was with an application Security company, and that first scan was the first value. And it's it's kind of curating it for the customer. And then from an advocacy perspective cause. Now I'll put my marketing. Add on, is creating moments along the journey to celebrate the customer, because that gets to sort of the emotional impact.
That the customer can get aside from the rational impact.
Yeah, yeah, no. II love that. We measured time to value meticulously at at motive, and for us it was a very measurable thing. When they did
they they had to file this document that was produced by our system. So we knew that when they filed that document they were compliant by law. In the early days a lot of people bought our solution as a compliance solution. So we know that if you bought for compliance, you did this thing that
allowed you to be compliant.
there was a time between that. So that that milestone meant that you had done something about you, and we would measure the days to that, and use that as a part of that that broader adoption journey. So II love that you brought that up. Thank you very much.
Cool. Okay, just scanning the chat here.

Where do you assess time value. I'm going to get into that in a minute adoption, I think, Mike, that's a good comment there.
and talk about funnels in a moment, and so we'll we'll talk about a little bit of this here Patty says. Would success plans have a role here? Absolutely. I actually think, particularly as you move into upper segments right in enterprise.
you almost have a custom when you're selling an enterprise. Let's say it's a million dollar deal in a lot of ways you're gonna take this whole template, and that's gonna be the customer journey for that individual customer. You can afford to have. Yeah, a plan, or a a almost a custom journey for that enterprise. Customer and then, as you move down market
there's different, you know, almost colored by numbers you want each. Yeah, templated customer plan and line around these things. So I agree here. This is all good
measurement. Great. Yonis, I love what you said here. Everybody copy and paste Jonas's piece here into a a document. I think it's super important, but I love it.
There's there's lots of good insight there. Okay? So anyways, big takeaways from here is, I would say, use this template as a resource. Again, it can differ organization to organization as as we've seen here. But really make sure that you yeah, you know those activities right through how you're gonna deliver them to your customer and know that this is not built in a vacuum.
It can originate in the customer success department. But then you really want to bring it forward to to your entire organization and work with those cross functional leaders.
Cool, alright. So just recap. We've gone through margin. We've gone through
segmentation. We've gone through journey. Now, if you think about each of these journeys. they're all in the shape of a funnel. So at the top of the class. We talked about. How sales has one funnel get the customer to buy in customer success. We now know that we have lots of different parts of the customer journey, and really each of these parts of the customer journey culminates with some sort of output, right? So the bottom of the funnel
alright, and so I like to think of the entire customer success organization as a series of different funnels. So let's just like define funnel. Alright. So the funnel represents the systematic progression of customers through various stages of a process with the objective of achieving a desired outcome. Right?
So again, you think onboarding the goal, get them to onboarding. You think
advocacy get to move to that point where they write a case, study with you. You think expansion. Get them to that point where they either expand or you capture a lead. For your organization, renewal is a really great funnel. It looks a lot like the sales funnel.
You know you have timeline short, and you're moving your customer down the funnel. So think about your organization in terms of funnels. Now I think there's a couple of pieces that you should get really familiar with. And that's number one. Understand? You know, what is the top of the funnel?
Look like, okay, so how do you start on this journey? What's the the the capture mechanism at the top?
What are the qualifiers within the funnel? Alright. And so when we're going through that journey exercise we heard a lot of people mentioned things like time to value Csat
things like that. Those are great measurements within it, but you can go even deeper there. It can be depth and breadth of features. You can be using tools like mixed panel to understand what people are app actually doing in your application as well. So how do you measure it? What

are the qualifiers? And then between stages. And I think this is really important between those stages you wanna be measuring
the percentage that is passing between each stage of of your funnel. In other words, what are the conversion rates within your funnel. And so I wanna double click on that for a second, the conversion rate piece, because the conversion rate is a percentage of customers that pass from one stage to the next. So think onboarding, or think renewal or think expansion.
Why is this so important? Why is it important to start to understand what these conversion rates are? Well, the reason is, these are your markers in a in your organization to understand actually, at a
a, a, a pointed level. Actually, just how effective your motion is. Right. And so I'll give you an example. We ran a pretty heavy expansion motion at at motive
alright. And so we started with awareness. So our Csm's in their conversations were mentioning other upsell opportunities we were tracking that so we knew the top of the funnel. We knew how many of these awareness conversations that we're being had. There was also what we would call a customer success qualified lead.
So we knew how many customers were moving from awareness to Hey, I expressed interest. This is interesting. I'd like to jump on a call to learn more. So now we had a customer. Success qualified lead a Csql.
We could understand the number of conversations we had
and the conversion rate to
Csql. And then we could go further down the funnel. We could say, Here's the number of Csql that we passed to the sales organization.
Here's the amount of dollars that came out. The bottom of that funnel we drove X 1 million dollars in air are for our organization. We have the top of funnel. How many conversations we had the conversion rate, and we had the dollars at the bottom. Now that became super valuable to the Cs organization, because
if the sales organization said, Hey, we need to expand X amount, or we need to our err. Our goal is X amount. This quarter. We could actually go up the chain. And we could say, Okay, in order to get there based off the last 3 quarters, we need to have this many conversations. We need to convert this many Csql. And
if the conversion rates hold true.
this many dollars will shake out the bottom of the funnel. Now I could go back to the entire organization and number one forecast.
But number 2 get help for achieving that call. I say, hey, there's no way our customer success. People can have this many conversations. Here's all the other funnels. Here's where their time is is spent.
I need more head count, or hey marketing. I also need you to help loosen up this funnel. We have to run a drip campaign. And so now we could test the effectiveness of adding these things these support mechanisms. And does it improve the top of funnel? Okay, we can measure that. Does it improve the conversion rate. If we add a an extra marketing email in the mix or an in App queue.
And so we could start to understand how we could affect the shape of that funnel we could forecast better, and we again we could align what we're doing with the broader organization. So I would say.

when you start to map out your funnels and assign all these funnels across your customer journey. The biggest thing I can recommend to you is, understand how those funnels work. Understand a baseline for what your conversion rates are between stages and understand how you can either ex, yeah, really accelerate or improve
each of those stages. And if you do that well, you have really good talking points. Go to the rest of the organization, either rally their help or rally budget. And so I would say, if I if I could like summarize just funnels with with one piece of advice, it would be get to know the conversion rates and speak in terms of of funnels and forecast more often than not.
Alright. So at the top. Remember all of this. Go to look,
you know, go live activation, support.
product adoption, renewals, change, management, advocacy, case management cross cell upsell. All these things can be put in the format of a funnel, and they should all be part of your your customer attorneys as well.
And so let's build a funnel. I kind of see watching the clock here for a second. how are we doing on on time? I think we're okay.
Cool, do we? Wanna build a funnel in in the chat quickly. Maybe let's do an expansion or a renewal. Let's do a renewal funnel. So just put in. We're we're doing a renewal funnel. Maybe walk me through some of the stages
the measurement of each stage target conversion rate, and maybe desired outcome.
And I'll just catch up in the chat here as we do that.
Rob? I love it. This is how I'm tracking Csqls. But the early days are just building the Csm's muscles of salesforce and or Hubspot discipline. Yeah, discipline is important. You need the the data.
When we rolled out Csql's app mode of it was a big process. First, we just
got people used to tracking these conversations. Then the next step was, can we track conversion from awareness? Conversation to
Csql. Converted, and we just got really good at the interplay between awareness to Csql. It was only after a couple of quarters when those Csql started to pass through the bottom of the funnel that we had good data on the dollars or the average dollars that would come from our different Csql. And then we could actually, like.
you know, pull that back up the funnel to get better visibility into the different conversion rates, and how much you know. Again, more conversations would lead to more dollars. And we did that across different product type. So we had.
you know, expansion. We had net new. We had new seats. We knew what the Csql. Conversion was actually on a on a pretty descriptive level across all of those different things that we could sell to our customers, and we would run campaigns on on each. So II love that, Rob. I think you're I'll say I think you're on the wrong at the right track.
A Angela says, how are others tracking conversations or using them in early stage companies. and where velocity isn't there
9.
So conversations, conversion, metric to your last slide? It's
your examples are great, for when there's a velocity of customers, my question is, if you're running a more strategic focus business where you're not getting the velocity of customers

moving through your funnel. What are you tracking? And how do you? How do you mimic this type of motion?
So let's say, like, it's pretty early stage company handful of customers.
Yeah.
cause. Then you're tracking conversion metric that don't actually.
yeah, your your metrics are really, really gonna skew quickly. Right one could be moving along, II think, in a situation like that. And I was I was a first hire at a company like Pre product market fit. So it was like literally carrying these customers. On your back. To get to that point, I think, like, actually, in that stage of a business.
you know you should. You should have this in the back of your head, hey? I'm bringing them towards this point of value, but actually treat the whole thing more anecdotally
and gathering just like the the milestones on that that customer journey. So just like start to get the muscle memory around like, or really, it's like pattern recognition around. Okay, I have 3 customers that are doing this. There's some congruency there. They're they're following a similar process. I don't necessarily have a funnel here?
and then use that to maybe start to build your playbook from there. So 3 customers doing this, what's in common with them. Okay, I need
my other customers to do this. What is it that led my first customers to do this? And just like
it's more of a I would say, like, you're not gonna be able to create a funnel. And and if anything, your funnel is gonna lead you in the wrong direction, because the numbers really won't line up. And so for you, I think it's more finding, the yeah, more anecdotal, or that pattern recognition. So that over time, when you have a hundred customers when you have a thousand customers, you know the shape of that funnel, and you can start to create some congruency. In your customer base. But early days
you you called it out. You're you're not gonna have the velocity, or you're not gonna have the scale quite yet.
I would say, like stage wise.
This probably starts to come in post series, a probably around like, let's say, like 3 to 6 million dollars in
in in AR is when you really get, you know, have enough like customers
to to really push along this funnel. If your Sme small tickets, you're gonna definitely have more customers. You probably get good at this earlier. It's a little bit of like, and and that'll all be done through automation.
Cool. Okay, Alessandro, I love it. Renewal at risk up size. Committed. Booked. Yeah. I love those. Quote renew.
yeah, what I would say is, folks, these are really good things in here. Copy and paste them and an exercise might be to just go through thinking through what the conversion rate could be on each. So think, test for the group. You all get it. This is great.
alright. And then, lastly, just watching the clock here.
you know, all of this is not done in a silo, so you have to do your homework when it comes to your margin, your customer journey your funnels, but also know that sometimes your organization might have strengths and or weaknesses. That, I think, is important for you to play along with. So Emmanuel myself had this conversation. I think both of us

and II manually, hopefully, you're okay with me saying this, but you know, early days. Ii had like a an ego in my organization. I thought that my group was the best group in the entire organization to do the expansion. In reality, we had a pretty Killer sales organization. We were really good at expanding, and when I looked at all of the other things that my team had to be doing or was doing?
I came to the realization that actually, you know what? It was probably a better thing that I asked that Csql to the sales organization because we had a really good selling team, and it was counterproductive
to maybe fight that strength of the organization on the flip side, you know. Sometimes products are clunky, you know. You have product market fit, but there's a lot of bugs. You know. It doesn't work all that. Well, in our early stage, Angela, like you probably have a
a really buggy early stage product. That's okay in the early stages. Sometimes customer success looks and feels more like support. So you have to just shift. And then
I mean, super mindful of where the strengths and or weaknesses are of your organization. You know. And and this plays out at every level. You know you can think about
You know the sales forces of the world, you know, all of us kinda
smirk and say, Oh, man, Salesforce, it's such a clunky product.
maybe, but it's like it's a killer selling organization. It's called Salesforce. Mark Benioff was
you know, a seller, a top seller at Oracle before. And so right down from the CEO, they have strengths, and that guides, you know organizationally how they are other organizations, you know. You look at Atlassian. They never wanted to have a salesperson. It's all been product led from the very beginning.
And again, their organization has the earmarks, and is built in a way that
except that fact. So I would say, like as you go forward, and as you start to think through your customer. Success. Team in motion. Just no, it's not built in a silo. It's not built in a vacuum adjust and adopt to to your organization as well. And that's okay. You can avoid a lot of frustration by swimming with the current sometimes, then against it.
and then final question or kinda statement is, yeah. Every organization is a snowflake. You got to accommodate the uniqueness of your customers.
and and the needs of your organization. Which is.
then why doesn't Snowflake have customer success? What are some reasons? So maybe this is a question for for the group. Let's talk about margins. Let's talk about
that that income statement. Let's talk about how they're going about doing that.
and just says, Oh, they have it. I love it anybody else? Diana?
Yeah. So a former snowflake employee here? So I ran Ps. For the Americas, and that was essentially customer success. So we sold it as an offering but I think going back to Frank's kind of mindset, it was about accountability, right? So it was more of a if you don't have a strong product.
Make sure product is strong. Don't put that burden on your Cs team.
So they have customer success. It's just it's more of an ethos than a just a pure function.
Yeah? Yeah. And and if you were to like map through everything that we talked, and I'm curious to get your perspective. But if you were to map through that income statement
you would see a lot of that customer success work, probably fitting into that professional services group on the Pnl. You would see it fitting in that cogs category. It's all getting done. It's

all funded. You would. You would see the customer journey and the responsibilities all those things get done. Who they live with is maybe different than the Cs heavy organization. But all of that is is there?
That's right. That's right. So lots of investment in education services, you know, more training classes than I'm seeing at prior companies support rolls up into engineering. So your engineering organization is very focused on product and product quality.
You, you customers essentially pay for professional services, and they keep a sales engineer and account executive aligned to the account over the life of the customer. So there isn't that ae, and that se are doing a lot of customer success functions that that, you know, typically in other companies get handed off to another team.
Love it. It's it's great to have you in this class to share that perspective. Because I think, like, yeah, a lot of us and customer success get
get heartburn when we hear, you know Frank slut and say what he does about customer success. But I always yeah. I always think actually, they're probably one of the best when it comes to customer success. And if
the output is fantastic. Nrr, well, they've got the best when it comes to nr
cool.
alright, I'm just gonna scan the chat here for a sec. There's also market expectations. That's companies around having gross margin. Yeah.
we use. But some senior, yeah, I agree. Yeah, that that makes a lot of sense.
Alexandra.
Yeah, I I'm I'm curious to. They just got a new CEO of Dave says, I'm curious to that will change. It's interesting. You know Frank Suitman was at service now before coming to Snowflake.
As soon as he left they reverted to a Cs model. So
tbd. yeah. alright.
So let's wrap it up. I'm gonna give everybody some homework. And here's what I want everybody to do for the next class. Just so this all syncs in so set up a meeting with your Cfo and get your year over year Gap revenue growth. I think that's the best way to really get your your numbers for that
rule of 40, and then also get your ebitda margin percent from your Cfo, so set up a meeting. I think this could be super productive. If you haven't done one of these already. And just understand. Hey, where does your Cfo think your activities are living?
Number 2. Review the activities of your team and
understand, hey? Are they actually fitting in the right camps?
And then, review your current segmentation with everything you now know about rule of 40, and run rule of forties on each of your segments, and this will let you know to see efficiency of each of your your segments. And I think this is really, really important. This is where,
yeah, a lot of dollars and or growth opportunity and or just re allocation of resources. Can. Those decisions can stem from so doing on segment by segment basis? Get a good sense of just what the the individual income statements for each of those segments looks like, and then start to
play around with your journey map and and see if you've maybe, are are doing those journey maps in the correct way for each segment based off of what you now know about rule of margin or rule of 40 and and margin.

and then finally pick one of your company's customer journeys. And then map it out with a new consideration for that. What you now know about Ebitda margin.
That's your homework. You can take a screenshot of this. We'll send out the slides afterwards. and let's stay connected. I'm on Linkedin. Hit me up. My email is there as well you liked? My content. Let me know if you're like dude.
No way, you gotta change this. Let me know, too. I got thick skin and this, like Emmanuel said, this is past number one. You always gotta work out the bugs on on cost number one. And so we wanna grow, we wanna evolve this so let me know what you think. I really value that.
Look forward to your guys discussions that you're having in your small groups and your cohorts. And on next Tuesday we'll kind of take this concepts that we talked about today and talk about now, given all these foundational things, how do you build the right team? So we'll talk about that on next Tuesday.
Awesome. Thank you all for joining us today and have a great day. We'll see you next week for class number 2. Forget to fill out the feedback survey. Please
bye.

Class 2
text
Hello, everyone! Welcome.
happy Tuesday!
Great to see you all! Welcome back!
I love all the cameras on. Thank you, everyone. If you are able to. We'd love to see your smiling faces
happy Tuesday
as we're getting settled here. Me and Emmanuel, we're just chatting about kind of this weird space that we're in between winter and spring. So if you wanna drop in the chat what the weather is like today, where you're calling in from, think that might be an interesting question. We'll get started here just a few minutes. Let some more of our friends join us.
Dreary.
nice rain, sun, sun sunny. Okay, I'm like in the hot and sunny that's that's great, overcast and cool. Where is that
welcome? We have a lot of folks that just joined us. If you're just getting here with us, we'd love to see cameras on, so we could see your smiling faces, and in the chat we're just dropping in what the weather's like wherever we're calling in from.
Finally, Sunny in Boston. Welcome! If you're just joining us, we're dropping in the chat. What the weather is like where you're calling in from.
Welcome, everyone. Thanks for joining us on this Tuesday.
We'll give it just a few more minutes. Here we have a lot of folks still joining us and rolling into the room
again. Thank you for all those cameras on. We love seeing your faces and having the interaction.
Well, I think we can go ahead and get started. As a few more people join us for class. I just wanted to give a really quick reminder. If you haven't done so already, please register for a cohort session. But

requirement to get your certification for cohorts is you can miss 2 sessions, and still get your certificate if something comes up, and you need to miss more than those sessions at the end of our whole term. Of these 8 classes together. You can reach out to the learn team at learn at join Pavilion. We have some makeup assignments. If something were to happen
cause we definitely want you all to get your certificates that are definitely hard earned, but a reminder to please register for those cohorts so you can get your certificate.
Besides that, we're gonna go ahead and get started today. We have Emmanuel with us, the Dean of Cco. School. So it's gonna be a real treat Emmanuel. I'll pass it over to you.
Great sight to have everyone here for class, too. So we today, I'm gonna keep this really interactive and try not to lecture at all. And last time was a little lecture heavy, we realized. And so we got some feedback, and we're gonna we've made some shifts already to make it a little bit more interactive going forward.
so I'm actually pretty excited to talk about this, and I'm gonna bring in a lot of examples. In this class. From my experience and hope to hear from yours as well.
Okay, so let me share my slides.
and
okay, hold on one. Sec. Where is why is this happening?
Then?
Sorry. Give me 1 Si don't have my zoom preferences setup.
Okay? Hopefully, this works.
there we go alright. Looks like it's gonna work.
Okay? Awesome. Alright. So before we jump into today. I didn't get a chance to kind of go a little bit more detail with you guys yesterday, because last week we had so much content on what to expect from the other classes.
And so I wanna make sure I go a little bit more detail than we did last time. So in case you have to miss a class, you don't miss the one that you're dying to hear so after today, the next class next week is with Alison to scorn it. Allison has a ton of experience. She's currently a Cco. With a ton of experience, specifically with onboarding professional services implementation activation.
So she's gonna go really, really deep on everything onboarding. So everything it takes to get a customer from sales to the point where they're live active, using the product and and which sometimes is a dedicated onboarding team, but sometimes is actually the responsibility. The Csm's depending on depending on your organization.
and she's an expert in this, and she's gonna go everything from all the Kpis to how do you do this sufficiently to self service to charging for onboarding and kind of every topic in between.
Mike's gonna go really deep on the Csm function. And he's specifically going to talk a lot about the one to many. This is an area that Mike shines
and he's gonna go real deep on some of those scaled programs. But he's also gonna talk about even the more one to one kind of relationship building but he's gonna definitely do some case studies and go deep on scale, which I know is a topic people wanted to hear. I know not. Everyone in here probably manages customer support, and my guess is about half of you manage support. Maybe half of you don't.

but it wouldn't be a Cco class without going deep on support. And this is a relatively technical class. But it's important, because I think support is one of those organizations where no one really understands. I know that
personally, when I took you know, at my role, at toast, where I manage everything post sale it was a black box to me for a long time. And then I was a I had a gap in leadership where I actually had to take over while there was while we were looking for new leadership. And
it was an eye opener and I wish I learned all the things that Shawn's gonna talk about before I had to kind of figure it out on my own and so, even if you don't run support today, if you have aspirations one day of being a Cco, this is an important class to learn.
a lot of you wanted to hear about driving revenue. How do you partner with sales on drive and revenue? How do you drive? Revenue yourself? Whether that's through cross cell upsell more traditional Nr ways, or whether that's actually through services revenue. And so we're gonna go really deep on. So Mike's not gonna cover driving revenue so much even though it is often the Csm function. Because we wanted to have a whole class on that
and sydney is part of catalyst and catalyst has, as I think you know, been really sort of championing the concept of customer led revenue. And so Sidney is gonna go super deep on that.
Seth is gonna go into scaling Cs, so some some on one to many but also he's gonna talk about AI and he's going to be talking about community and he's gonna be talking about how to sort of think about running your S. Everything in cohorts and the concept of a cohort, and so he'll go deep on that, and then we're gonna wrap it up with. What the what a board is looking for in a Cco and as well as which is really just kind of the
I'll give you some of the.
I guess, a sneak peek on that. And this is gonna be a lot about customer experience and a lot about getting in the exact and the board engaged. So this will be things like a customer advisory programs, voc programs and everything that's gonna drive customer experience. And we're I'm going to interview Allison Pickens and because she sits on a lot of boards, and to get this perspective of what a board wants from a Cco.
So that will wrap up the class. And then you guys put in the slack channel. If you're not in slack already, I suggest that you go into slack. You guys put into slack. Many of you, I think 8 or 9 of you
commented and on things that you want to have covered and so I'm not going to read through this, you can look through it yourself. But these are the things that you asked for in that slack channel, and these are the classes in which they get covered. I am sorry to say, the only topic that that was on there, that we are not planning on covering right now, and if I can squeeze it in somewhere, we can. But it is currently not in any of the content. Is the Cs platform.
Creating a business case for a Cs platform. So not explicitly in there. But everything else is will get covered in one of these classes. So if this was your ask then then go ahead and make sure you attend that particular class. And I still did, you know? Go ahead and still add more to that. That slack question. If there's other things that you wanna you wanna get covered? Alright. So with that, said.
let's dive into today. So
today, I am gonna keep keep us very interactive. Like, I said, right? And I'm gonna focus on how you really think about your mission. In Cs, and we're gonna talk about this concept of an act.

We're gonna determine what act you're in. And from there. Once you know where your act you're in, how you can build your strategy, your team, your org structure. And how do you communicate your progress to the rest of the organization.
So that's kind of what we're gonna do. So
this probably sounds familiar to you. And so familiar to me, at least which is.
you know, when I you know, when I joined toast it was like great. You need to run. You know our onboarding function. You need to run the support function. You need to manage product adoption. You need to make sure that we get retention and renewals. There's a lot of change management because we're rolling out new products all the time with our customers. Oh, we wanna launch a voc program and an advisory board. And there's revenue that you need to manage from all of our professional services. And of course, we want advocacy because we want referrals, because that's a really
part of our business. And of course, we get to manage cases every single day in our support team. And we should launch a community and we're gonna be launching new products. There's crosssell and upsell opportunities. And we should definitely put more customer education on our website, more videos and stuff. And you know, you have this budget. And we need to watch efficiency. And of course, we need to get customer feedback all along the way, right? And so this is what you're kind of, and there's probably more. I'm probably missing some things.
But this is what I see. You know, Cco is handed with and it's really overwhelming, because there's a lot here. And as we talked about in the last class, right? It's you know it isn't. It isn't as sort of black and white as sales is. There are so many different functions, so many different capabilities that need to get managed. That it can be really overwhelming. It's like, where do I start? What do I do for
first? You know. Do I launch that voc program now, or do I wait? You know, how much attention should I be putting on? You know, customer feedback right now, versus a referral program. And it can get. I guess it can get really overwhelming. So the way that I've thought about this is and is x
I ran Cs at toast for 5 years. And from 30 million to about a billion in revenue. And I I'm gonna show you 3 of the acts that that I was in. But honestly, there was probably 8 or 9 so 8 or 9 different sort of periods of time where the focus changed. And frankly, my job changed, the team changed. How I communicated what we did to the rest of the organization changed!
How? The metrics that I managed, you know, or I focused on changed the way that I to structure the team changed. I mean, it really impacted a lot. Based on what? Depending on what act. We were in at that time. And so that II found it really helpful to think about, you know, to not just look at. Okay, look at all the 1 million things I need to do.
and instead focus on. Alright. Let me let me hone in on the most particular, most important app right now.
So what does what does that mean? I'm gonna visualize this. You know. So it might mean, this is just an example. Right. It might mean that in the first act.
and this could be like an earlier stage company where you know. Maybe you're sub a couple of 100, you know, sub a couple of 1 million dollars in revenue where you're we're that like that early feedback from customers is still like the absolute, most important value that Cs can provide. Right? So act one might be. You know what this is. Most important thing we can do for our

organization is product feedback. That is the most important thing. Act 2, might be speed of activation.
Right? So this may be alright. We found product market fit. And now we're really, you know, sales is cranking. And you know, we've got to get that time to revenue, or that time to value that speed of activation, or and we'll talk about different ways of of measuring this. And we're obviously gonna go deep. In Allison's class.
But that is, you know, that may be the focus. There may be a focus later on where you know you're driving efficiency. It's like, Okay, great. You know, we've we've kind of have our playbooks for Cs, but it's too high. Touch, and now we need to shift, focus and figure out, okay, how can we do the same amazing job. But how can we do that? In a more scalable, more efficient way?
Or maybe you're focused now on okay, well, I gotta. I gotta turn Cs into a revenue generating engine, because it's you know, we're considered a cost. You know, a cost center. We're getting squeezed and so now, I really need to figure out, how do I monetize Cs and how I you know, and how I drive drive more revenue through. Cs, so these are just some examples. Now.
it doesn't mean that you only do one thing at a time.
That huge long list of like the 400 things that hum a Cco org can do. Isn't necessarily, gonna you know, get dwindled down to one. It just is. If you think about the acts that you're in. It just allows you to focus on what's the most important and really, where you, as the leader, need to be spending your time? A? And so
yeah, what it does is it allows you to gain alignment right around your strategy and around the investments that are required right? Which is really really important in a world where a lot of your peers and maybe even leadership. The people you report to may not actually understand what you do. And I found this to be true. A a lot of a lot of folks that understand Cs
And so by having these really well defined acts. It gets. It improves your ability to get that alignment. So everyone understands where you're focused. And what investments are required to get to the place where your company wants to go. It allows you to focus on what's the most important thing for your company. I have seen a lot of Cs leaders through my advising work and my board work.
You know, focus on something that's on that list.
But it's really not the most important thing right now for the company. It's important
and don't get me wrong, you know, like we want it. But it's not important now. You know, there is a time and a place to focus on community. There is a time and a place to focus on customer education to focus on advisory boards. Maybe it's now maybe it's not and you know, learning how to make sure you're focusing on what the most important thing making sure you're building the right organization.
you know, and that you're focusing your investments on the right type of people. Also helps in determining where you need to. You know, build alliances right? Like alliances are, gonna be an important part of your you know of, of
your ability to be successful in Ti inside an organization. And you know, I spent a lot of time and what we will talk today about, you know, building alliances and and alignment with sales, building alliances and alignment with product. Really, talk about that later. But it's it's really important to make sure that you're focusing on where you need to build the right alliances. And it tell it's how it also helps you tell a story

right? That can be backed up with the right metrics. So when you know if you do get that question, and I'm sure we all get this question because I know I got it a lot like, do we really need Cs, do we really need Cs to be as big as it is. All those questions. It helps you tell a story that can be backed up with the right metrics so that you can justify those those investments. Right?

And so, you know, and this is more critical than ever. In a world where budgets are declining. And crows are starting to take over some parts as post sales activity, as a trend. And so you know, defining your strategy is pretty much more critical than ever.

okay. So I'm just gonna go to the chat really quickly. Jan, how do you build on the prior acts? We'll we'll talk through that.

Could any of your does it sound familiar list be taken on by sales, team or other revenue teams? Absolutely right. And this is part of the this is this is Charlie's question. This is part of those. This is part of the acts. An act doesn't necessarily mean you're doing everything on that list. I'll actually sneak peek at a a real ex example from my past.

because I was a sales leader before I was a Cs leader. I wanted to own all cross cell and upsell when I was at test, and that was

you know, that was more of an ego thing than than necessarily the right thing to do. But when I looked at all the things I had to do, and I, when I looked at what act we were in as a company, and then, therefore, what act I needed to be in it was clear.

and and as we talked about on last week. The capabilities of the company. It was clear that we had amazing capabilities in sales.

And I needed my team to focus elsewhere. And so, just because I could lead a revenue function, it didn't make sense for me, too. And so that was, you know, an opportunity for me to say, you know what I think sales should actually own this piece of you know all the things that we need to do. So yeah, we talked a little bit about this last week, but understanding

your company's

like forces of gravity, strengths, organizational capabilities, you will not. The reality is, you will not do all those things well, like everything on that that list right? There's no way you're gonna do it all well, all at the same time it's impossible. So either you focus or if you if there is, if there does need to be multiple focuses

you, partner with other organizations, and maybe other departments take on take on some of the work. So I wanna remind you of the 5 key concepts that we talked about on last week, because they're they're really important. And I know we kind of breeze through them, and we spend a little bit more time on some than others. But

before you even start to think about okay, well, what's my mission? What's my act? What does my team need to look like. What are my metrics? What are other teams need to look like? What alignment, what teams might need to align with? You really need to make sure you fully understand for your business.

Margins. So you know gross margin cogs. What part of your department is being considered opx. What part of your department is being considered cogs and and how e either of those impacts the organization? It's not uncommon for it to be both. It's not uncommon as an example for like support type.

roles to be cogs and then roles that are generating revenue like that could be onboarding, or that could be your rsm, your your sorry, your Csms to be considered part of opex

just also remember, though, if if any, if part of your part of your department is considered part of opex, and if it falls under sales and marketing, then that means it's also considered part of Cac, which typically your Cr. Or your Cmo. May own and so that creates either tension or an opportunity for alignment. or an opportunity, for, you know, negotiating
who should be doing what? So it's just important that you understand that. And you understand. I find that then this is, I'm not trying to. Ii find that most Cs leaders are close enough to the P and L. And to the finances as they should be so. It's just if you're if you feel like you're one of those. Ii think it's an you can find a friend and finance and get as get as educated as you can. Segmentation we talked about you know. Not only how does a sales team segment? How does a sales team go to market? But how do you think about segmentation? Of your team? A a of your market right? And so making sure you're serving your customers talked about journey mapping. We spend a lot of time on that. So I'm not gonna go too deep on that we, we talked about phone optimization. But I wanna
just double click on that for for 1 s the the, we talked about the different types of funnels we talked about manage, you know, measuring where there's where there are where there's like sort of blockages in your funnel, or where you're seeing friction in your funnel, measuring conversion rates through different funnels. And those funnels could be an upsell funnel or renewal funnel or it could it could be an activation funnel or an adoption funnel.
The the reason why we I want to, you know, kind of and talk about use even use the word funnel is, I think, the more
this the Cs leaders can talk in language that is understood especially by sales and by the board, the better and so the more you can talk about conversion rates and you know, and where there might be, you know where you might have
you know, fall off in a particular journey or a particular funnel. The the better. Right? because this is this is where it's sort of the science and the art kind of come together. You know, relationship building is important, and that's all about the art. But you know, driving you know, driving efficiency through whatever funnels you're talking about is is really important.
And then organizational orientation. We talked about that already, too, and I gave you the example I've been at toast. The sales team was really strong, so did it make sense for me to try to duplicate a function that they were already good at, probably not right when, especially when we had other other acts that were more important at the time. And then how complex your product is
and the the that will dramatically dictate the kind of team that you need to. That you need to build and so where's gonna we're gonna go through now we're gonna kinda go through some exercises on each of these. I'm gonna ask each of you to take out a piece of paper. If you don't have a piece of paper and a pencil handy, then just like open up a quick like
dock that you can actually write these things down. So we're going to go through sort of a worksheet
process here and a after each one. I'm gonna open it up for some feedback and from some comments from the group, and this is gonna help you determine what act you're currently in and and then, therefore, how do you think about building your team? How do you think about building your strategy? Okay, So
the first the first thing I'm gonna hit is the economics. Okay?

So I want you to take a piece of paper and I want you to rate on a scale of one to 5, one is not worried. 5 is pretty worried.
Think about your Cfo or your most senior finance person at your company. And rate on a scale of one to 5. How worried he or she is about these 6. These 6 sort of metrics, these 6 financial metrics. And then
for each of them.
from your sort of point of view, does this make sense? Is this, is this warranted right and like? And you can put a quick yes or no right? Yes, definitely warranted or not so much. I don't. I don't know why he or she is freaking out about this thing. I don't understand so to spend
2 min filling this out, and then we're gonna open it up for some discussion.
5 being the most worried. Yes. and one number on each. Yes. so AR could be a 3, and Ndr and Rr. Could be a 4,
etc., etc.
Okay, I'm gonna stop sharing for a second so we can see each other's faces a little bit better. Does anyone want to share what some of the number 5 s. Are on their list the things that their Cfo is the most concerned about, and and then your point of view on that
I'll I'll go. we are on a moment when our finance team is very much focused on the rule of 40, which is in my case, the rule of 50 and
the Ogs scopes is the concern right now.
Seems like we are focus on diminishing those. So that's the bigger like, that's the 5 in my case. Yeah. And do you find? And does that?
Does that make sense to you? And do you feel like it is it's a reasonable.
it's a reasonable focus area and something that you can impact.
And so I think we in my case, my company, we went from an hyper growth moment to a moment where, like the grow is in longer this big right? So it's more like about scaling. And there is a concern also around err. And having gotten there.
the target.
Not quite right? So obviously, not making the target has shift to focus on.
Co Cox. It does make sense, and we are in customer success align into that, trying to focusing on very much on the scaling, and the only one to many and
efficiencies essentially.
And you and you believe that that is
But there is, there is opportunity to become more efficient, and it won't. It won't actually hurt the business. It's not a shortsighted is the right is the right path to take, or is a lot to do on getting more efficiencies rather than getting more accounts. Yeah, for sure. Okay, great someone else.
I can share real quick if if you want to. So I think the 2 highest priorities for our business, and we start our category. These are mature businesses. With multiple products. So the 2 of them are ha right high as this AR, and mostly AR girls
and net revenue retention.
And and and you you think those are the right 2 focuses.
I do. I do, and maybe sort of circumstantial of of our own business. But it came point where we were sort of
signing X amount of business per year, using the same amount in attrition. Right? So that's it's it's not

It doesn't contribute to the to the growth of the business. So so I think those are the 2 ones to sort of be focused on right now for for what we do and do you have, do? Are you clear on how you can impact either of them or both of them.
Yeah, growth. It's it's sort of certainly more. I'm looking at both lenses, sales, lens as well as customer success, but to be more driven by by by sales. But we're we're see, escalates. A role is in
instead of contributing to to lifetime customer value right, that if you have a certain profile of a customer that that tends to stick with the solution and service
that will increase the long term value of the customer or the life and value of the customer. Therefore you want to incent salespeople to go sell more of that right? So
and and and attrition is is important. You know, it's it's discipline more than I mean, it's always so. It's important to look at. But so sometimes it gets forgotten or or or dismissed. So yeah, we should assume a certain amount of attrition per year. And what I found useful is that when you look at attrition as a total number of annual recurring revenue. The number may look small in most Sas companies. The way we decide to look at it is
attrition as a percentage of the amount that is renewing that year, and then the use of seeing numbers like 1720 are more eye opening
right? But that's great. It is not. There's like a few people put 5 on AR and ndr right? It's not it is not uncommon obviously for AR growth to be. It's, you know, one of the top focuses it.
2 years ago it probably everybody on this call would have said, maybe Arpu and you know, maybe a few of you would have said things like cogs or operational costs.
Even ndr, you know, it's it's surprising how in some companies that wasn't even part of the vocabulary until more recently, and one of the challenges when the focus is on AR only or like, like the primary focus
is.
then the sales gets all the in sales, gets all the investment right? Because the feeling is okay. Well, it's sales is gonna create sales and marketing, who's gonna create AR? And so sales gets the investment and and you know, the Cs team sometimes are fighting for, you know, for for any investment possible. And so, if that is the case, you know the question, I always
wouldn't, you know, pose back to you is okay. Well, how can you influence AR? And how can you make a case that your team influences arr even in a world where you have a large sales team, a large marketing team. You're spending a bunch of money on sales and marketing right? And how can how can you influence AR and that might be through. You know, that might be through
through through through Ndr, so that might be through just growing. The arpu a particular deal right? That might also be an a referral program as an example, right? Or references, or anything that you can do to to help sales close. More deals. It might be more of you know. How do you? How do you do? Cql, right? Someone mentioned that advocacy I think about is like, you know, refer. program, etc. Right? How can you get your customers to be a voice? So time to value is another way. Of of driving AR, especially in the world where? You don't. You don't count revenue until customers live. then you have a direct impact to AR supporting Rfps. There's another great way. My, and so
there are, you know, having Cs leaders. Talk to prospects. To give prospects confidence that they're going to be taking care of when they're post live. So there are a lot of things that that you

can do that might be outside of some of the day to day. But if the focus is on AR, and you're not doing any of those things, then you're going to be an afterthought.
Sorry I'm gonna be blunt, right? But that's just the reality is you're gonna be an after thought right and then, when it comes time for making asking for investment, and you're talking all about, you know I don't. You're talking all about customer experience and a a adoption and other things. You
know, you're gonna get a lot of like glaze eyes. And like, Okay, you know, what what we really care about is, you know, we care about AR. And those things aren't arr right. So you gotta have help make the connection between AR and those things. So I think you got the idea. Let's keep let's keep going
and
oops wrong. Slide deck.
Hold on.
Okay. So
second criteria this one's, I don't, you know, is is important as you think about building your team. We're not gonna spend so much time on this in terms of discussion. But when you think about you know how you're gonna build your team? it's really important to think about what are the different segments? And what percentage of your business comes from those different segments. And what are those segments need most from post sales
from your company? You know. So you know, for example, this can help determine for your Csm's. This can help determine ratios. This for your onboarding team right? If you're if one segment of your customers needs a lot more hand holding than another segment of customers. This can determine how you structure your your onboarding team.
If some segment of your customer demands different types of Sla's from your support team. This can. This can change how you structure your support team. Maybe you need to structure your support team. With a, you know, dedicated hotline or a premium support for a certain segment of customers. Right? And I'm not. Gonna have you do this right now. And this is, gonna be homework for you to do. You guys will all get these slides right and cause you may not even have some of this data at your fingertips, and this will take a little bit longer.
But it's really critical that you you document the segments. And if you if you don't have any segments today and you're managing everybody the same. Then you're probably going to be at some point, face a crisis. Where? Where you'll realize that it it's probably too expensive, most likely. And you're probably not servicing
each segment in the most effective way. So think about who your segments are, how much of the business that represents, and then really spend some time thinking? What does that particular segment need most from my company. And that's gonna be an input into your organizational structure, which we'll we'll talk about in a in a little bit. Again. We're not gonna do this one today.
okay, so again, we're not gonna do this one today, either. We're gonna do the next one. But we're not gonna do this one live. But this is another exercise that I want you to do. After class right? And is,
yeah, this. This. This is like a extraordinarily skinny down version of what could be a multi-month engagement by a customer experience consulting firm or a service design consulting firm. And I've had lots of experience with all of them, right where you go at in a nauseum detail into all

your customer journeys. And you map them all out. You have giant whiteboards and sticky notes all over walls where you're really mapping out. You know the big parts of your customer journey. that is multi months, multi weeks can be very, very expensive if you hire an outside company to help you do it. So there's a really quick and dirty way, right? Which is just high level lists some of the the 4 or 5 biggest journeys right? So that journey could be, you know, demo to contract that could be contract to to live. That could be, you know. You know, live to adopted that could be adopted. It could be a Ca, you know, getting getting support, getting help.
Could be a journey. It can be very granular like in the case of toast. There's a whole journey around just installing hardware right? Or it could be very broad, right like getting you know getting help when you have a technical problem. Okay? And for for now I just want you to, you know. Say, okay, is this journey?
A maker or a breaker of trust. Right? That's the key here, right? Is it a maker or a breaker of trust in general, when your customers are doing that thing?
Are you? Yeah. Is that creating an adding to your piggy bank? Of trust? Or is that depleting your piggy bank of trust right? and then and then you know, just like, sort of how broken is it? How important is it? Cause again, understanding where that that fives are both on makers and breakers
will actually help you figure out what act you're in and how to think about your organizational. So as an example.
you may have a a breaker in in a part of your implementation. But where your customers struggle, it's very hard for them to do. They get frustrated. And they lose trust. And also, you know, you potentially have fall off in that particular funnel and maybe it's it's really bad. Maybe 30% of your customers are are experienced. This breaker
that might mean as an example that you need to put a lot more emphasis on either filling that gap with humans temporarily or pushing on your R. And D team to automate something or to fix a part of the the the product that's causing these particular problems.
And you need to make a business case for that. This is something that I do very regularly, because the makers and breakers will change over time. But it by being proactive and doing this really regularly with my team. Means that we're on top of everything, and we don't get surprised, because the last thing you want to do is
have your CEO or or or your board catch wind of a real challenging part of your customer journey that you're not working on already? And that you're not being a very outspoken advocate cross functionally, for how you turn this particular, especially the breakers into makers and on the makers the things that are, you know, amazing. This is where you capitalize. This is where you.
you know. You know. Celebrate. This is where you, you know. Try to drive references, try to drive referrals. Try to get advocacy through this particular part of your customer journey. So, and but it will help you define where you might focus your organization. If you spend time doing this and spend time doing it pretty regularly.
Okay,
And so one question is, how many journeys do you tend to recommend general question, you can go super deep or high level. If you've never done anything like this before, I would suggest going higher level. I and you know you're probably sub 10 if you've never done this once you get used to doing this, each of those journeys can be broken out into into

so many journeys, right and or multiple multiple stages like. So I the gate, the example that I gave you the toast example I gave you was part of onboarding was installing the hardware. Okay. So if it was the first time I was doing it, I might just talk about onboarding in general. But if I wanna go deeper than I might say, Okay, what are all the steps to onboarding? And where are their potentially, you know, where are the steps
which steps in that whole process are makers and which steps are breakers? And if let's just continue on hardware, install for a second. If hard. If hardware install happens to be a breaker, then how do I work with the product team to, you know? Make that more plug and play. Or maybe I need to work with my education team to make better videos, of how to do the install. Or maybe I need to put a QR code in the box
when they, you know when a piece of hardware ships that you know, can step by step take somebody through it, or maybe I need to, you know, label the the cables a little bit better. In the box right? Or maybe I can't do any of those, and I'm gonna have to have
partner with some manage service providers out in the field who can actually come in and install hardware on behalf of the customer. Right? Maybe I have to do it in a more. A costly high touch way. The point of doing it isn't, isn't the the point of that example is to show you that, like you have a breaker. If that breaker was a big one and was causing other problems.
I have to solve it some way, and making sure that I'm showing the organization that I am solving it and potentially shifting my organizational structure to solve. It is pretty critical.
And yes, I would focus on the extremes the major makers or breakers, which is why I asked in, when you do this exercise, to rate them on a scale of good or you know how bad or how good, right now, how broken is this, how much impact is this happening? What and the way you can think about how bad is
you can think about like, could this really could this lead to churn? Is it that bad that it could lead to churn? Or is it impacting a good percentage of your customers? If it's both. If it could lead to churn or negative reviews or negative Mps, and it's impacting the larger percentage of your customers. Then you know, those are the ones you focus on. First.
How do you approach number of customer?
The number of customer journeys when you have a multi product orgs? Well, I would start with them the product with the most revenue. That is, and and start there and if you need to do it with 2 products you can do with 2 products. But you can literally replicate this slide with for each of your products. I wouldn't do all of them. You. Just. The reality is, is not. All of them are created equal, not all of them are as important. And so I would just focus on the most important products. First.
think I answered all the questions. If you have a question before we move on to the next one, which we're gonna do another. We're gonna do this one live.
you can go off mute.
Think? I answered them all.
Okay. Alright.
Okay. So, Funnel I'm gonna ask you to do this one on your piece of paper? So this is. Now you're putting yourself in the shoes of your CEO
and these are just le. These are just ways that I thought about. You know. You can put yourself in a fuse. Your CEO. You can put yourself in issues, a little of of you know of of the board, whoever makes sense? But put yourself in the shoes, your CEO, and what would your CEO

believe that the and this is a this is a on a scale of one to 5. Again, how important is this particular funnel?
And then
you rank on a scale of one to 5, your the performance of the company on this particular final. So, for example, right now.
you know, activating customers or having customers go live is a my, CEO thinks it's like the number, you know. It's a 5. It's the most important thing. You know one of the most important things. It can be multiple fives, right? One of the most important things. And I think our performance is it's kind of mediocre. It's a 3. Okay,
If there are others, you can put another. I put a place for others right? There's everybody on this call because Cs is not one. Size fits all. Everybody on this call has different funnels and that are in your world. So feel free to add your own. But spend 2 min. 5 is important.
And 5 is great performance. One is not very important and not very good performance.
Okay, I'm not gonna ask you to to share these. Well, I'm not gonna ask you to share the specifics of like the rate the ratings right? But what I want, if if anyone is willing to share where they might have seen a mismatch in terms of importance and performance, and any sort of moments
that you might have had in terms of where you may need to be. Focusing a little bit more. So anyone wanna come off mute and share any area where there might have been a mismatch and anything and anything that was an Aha moment for you
cause it. This is the the reason why I was really, I asked about, you know, putting yourself in the shoes of the CEO is
You know, we get all we get pretty
mired in our day to day, especially post sales leaders where you know, I mean, yeah. My job at toast was 24 7. I mean, it was weekends nights, Friday nights were.
you know, I was working Friday often on Friday nights. Right? And you can just lose sight of the big picture really, really quickly. And so going through this exercise makes cat allows you to take a step back and say, Okay, like, what is, what is the person who's meeting with the board every day? Who's fundraising? Who's meeting with our investors? What are they thinking?
Oh, go ahead, Adam.
are you sure? Okay? Yeah, I can take a stop with this. So I'm part of a private equity roll up that acquired several complimentary solutions. I
as such, the cross so upsell motion is massively important because it's part of the investment hypothesis that drives enterprise value.
And so that's a huge focus for us.
Because a lot of the products came together. We're single threaded products. Everyone's learning the multi-product motion.
And so
there is a bit of a mismatch and and there's some catching up to do on the execution side.
A bit of an Aha moment for me. I think a lot about product adoption.
Our CEO probably thinks very little of it until it's a problem ie. Churn. And then I get a lot of questions. So I guess that's my camp. And and why I I'm paid to pay attention to.

Yeah, that is really common. By the way, and this is why the the axe thing is so important, right? And and I. And you know, I'll just share really quickly. Like, yeah, I was talking about. Like many Cs leaders, I was talking about adoption before the company was ready.
and so I was. My, I was thinking, hey, my my act as adoption. But the company wasn't ready to talk about adoption yet, right? And it didn't need. The company didn't care as much about adoption. Eventually it became more important, right? But it wasn't. And so when I would be talking about, everyone would look at me like I had 10 heads, because it just wasn't the most important thing at that moment. Right? And having that introspection that Aha! Moment that, like you might be, you may be prioritizing
something different than your leadership was prioritizing. It doesn't mean that adoption is not important. We all know adoptions important. I'm not gonna say it's not important. Of course you want your customers to get value from your product? Obviously right. But is it where you should focus your time and energy, and especially your reputation, and the way you talk in in, in, you know, in a staff meetings and the way you talk, if you're invited to board meetings and other things like that.
maybe, but maybe not right and and navig and and having sort of the wrong talk tracks, or it can really hurt your credibility. As a as a leader right and and again, it just means doesn't mean it. It could mean that you're one step ahead of everybody. But I also can mean your one step behind. So you and yeah, who knows which one it is? But having those Aha moments is really critical. Anyone else have a
have an Aha! Moment about where they might be either one step ahead, one step behind or just mismatched with their leadership.
I noticed an inverse correlation between the areas that were of low importance to the CEO. I rated as high performance, and I think it's because
the CEO is looking for where
where it's about to break right? So if something is operating well you end up kind of taking it for granted. So I get a little bit of satisfaction like I've done well enough. That's not the CEO's problem, right? But it's just another way of saying what you're looking at.
The things that are. The problem are where the performance isn't there yet?
Yeah. And
But then on the flip side, right? If there are things that you've done such a good job at that. They're no longer problems, and that no one's, you know. It. That gives you ammunition to rem like to remind everybody in the organization how well, you've done with this particular thing right now, and a chance to celebrate and a chance to, you know, sort of pat yourself on the back. Make sure you're getting credit. You know, for the things that
may not be top of mind. But they're not top of mind because they're handled so well, so identifying those areas as well. The inverse is not just so you can make sure you're focusing on the problems. But also so you can make sure you're you're celebrating, and you're giving your getting, making sure your team is getting recognition for the things that are actually working right. And so it's a little bit of both so great. Anyone else wanna share before I move on to the next one.
I just wanna ask a question about the adoption that you had highlighted, how it was important to you, but wasn't necessarily important to leadership. I struggle with that because adoption obviously ties really closely to retention.

If you can't get a customer to adopt, you're most likely not going to get them to renew.
and then that also aligns with advocacy right because you can't get them to adopt. They're not going to renew, and they're not going to advocate for us. Right? So my whole thing is is, I had a similar situation where I'm trying to drive adoption and
help help better articulate the value and the impact that that customers are getting from our platform.
And yet it wasn't the right time. But then they're fixated on renewal and retention. And
if we have a strong adoption
ex, you know, if we're focusing on adoption that will ultimately drive renewal. So
yeah, I it it. It comes.
It's a really good point. And we all know that. Yeah, the renewal. This hasn't happened by itself, right? And if your company is focused on renewal that the inputs to renewal are, there's lots of inputs to renewal. Getting value is the number one, input to renewal. 9. Not the only, but is a a very important input to renewal. So you need to prove that. So you need to work backwards. If if the focus isn't is retention, then you need to prove through your data that
the the input to retention is adoption, and you have to, and so that you can justify why, you you're that crazy person to keep talking about adoption. And if you can't, if there is no connection. And if it's just a theoretical connection, but it's not a real data driven connection. You're gonna have a harder time.
Right? My point is doing. This is not to say that the adoption isn't important, right? It's to say that you need to make you need to be able to have the data that shows that adoption is gonna lead to the things using your example, adoption gonna lead to the things that they care about right and and so, if retention is very high on the list of important right and retention doesn't come through just having a good renewal motion right? And retention
hopefully, if you can prove, and you can show. Hey, look, look at customers who weren't adopted, and look at their pro. You know probability to retain one of your favorite people in your company should be if you don't have one that's reporting to you. And there's someone in the organization is a bi person, a data science Bi person who you can. And this was probably like I made friends with the data science team
very, very early and said, help me help me correlate Nps to renewals. Help me correlate adoption to renewals. Help me correlate.
I mean just didn't help me make a case. So that that so that cause I otherwise, if I couldn't make the case again, you're not gonna Garner trust with your leadership team. If you're talking about something that they don't understand, or something they don't care or something. They don't see the data connection.
I was just going to follow up on that. So then, if if the data isn't strong, you know, like if if you if it's not clean, if it's not really available, that sort of thing, then it probably your first step is to just make the case of what you need to be able to act on with data, right? To make sure that's the the primary. Yeah, if you can't make the case with aggregated data.
then make the case with anecdotal data. Right? Make the case by talking to. You know.
5% of your customers. And and you know, and then turn that around right and say, Listen, we don't have the data in our product. We don't have, you know, but I talked to 50 customers, and here's and here's the names, and here's the Logos, and here's what they all said right. But it the the macro point is.

you know, if you're in the wrong, if if you're in the wrong act.
it could mean that you're well ahead of everybody else. It could mean that, like you're seeing things that other people aren't seeing right like
But just, you know, banging your head against the wall, being like you. Everyone needs to see what I see is not gonna get you anywhere right? And so if that if you believe that's the case, and there's a mismatch because you're ahead. Then you gotta build the data to correlate. You know, adoption or Mps or whatever it is you're trying to correlate to the outcome that that your board and your leadership cares about.
There's a lot of questions in the chat. I'm gonna try to get back to them but I'm gonna I wanna also just move on quickly because there's a few really important points running out of time. So I'm going to keep doing this. There we go.
Okay.
not gonna ask you to to talk about this one. But again, homework right? Every company has centers of gravity, right? Has, like departments that are. You know, culturally, sort of the focus, right? And you know, I've been in companies that are like, so R&D focus, I've been in companies that are like marketing like it's.
you know, a little vaporware. But it's marketing, right, you know, and I've been in companies that are very good to market. Very sales focused so just quickly rank the performance of different teams. And
you know, on on a on a, on sort of a a one to 5, and then stack rank. This is a stack rank, so the the second column is a stack rank of where the center is really like sort of the center of gravity is at your company. Right?
And the reason why do why do this is. I talked about this a little bit earlier. We're not gonna we're not gonna get interactive with this one. But is because, for instance, if the center of gravity at your company is sales, and if the sales, if the performance of the sales team is phenomenal, like, you know, you would give them a 5. That's the best sales team we've ever seen in your career. Right then that might really shift how you think about Cs,
I gave you that example that I had right, which is you know the you know, with a really really strong sales team. Does it make sense for me to focus on cross cell upsell when you know somebody else can do that and and do it well and potentially better. And sometimes you need to put your ego aside, and sometimes you need to put like what you think you should be doing aside
and look at where the centers of gravity are in the organ and the performance around you, and say, Okay, where can I tap into other departments? Because the list of things that that a see, a a a Post Sale department can do is endless. And as I said at the beginning, you're not gonna do them all well, and so tapping into other departments, might actually be really critical for how you think about structuring your organization
organization? And it also may tell you where you and on the Flip side, you know it may tell you where what departments you need to cozy up to a little bit more, or make sure you have a strong relationship with
this is something I'm gonna ask you to do now. So for these departments right quickly on a, on a one to 5 who you have good relationship with. Look where you feel like there's really tight alignment. You know, the the leaders of these org are focused on very similar things. That's a 5.

And where you have weaker relationships with and why? And then identify one department that you need to get closer to
okay.
for time's sake. I'm gonna I'm gonna keep going. I'm gonna have you hold on that thought for a second. We are. Gonna talk about alignment with other departments. So I'm gonna ask you to share which department you need to get most aligned to in a minute. But just for one, we're gonna do the last one really quickly, right? And which is product complexity. So again, I'm I'm gonna have you do this one is homework right? But
the understanding, your product complexity is really important for building your organization. So what I'm gonna ask you to do is on a don a scale, one to 5. Again, the perception of complexity. By your customers.
and you know. And do you think that's that's warranted right? And so when a customer first sees your product, you know, do they think, wow! That's complex hard? That'd be a lot of work. Yes, you know, very, very complex would be 5, not so much one how much customizations required little customizations of one, a lot of customizations of 5
once live, how easy is to get adopted! One would be very easy. 5 would be very hard. And then, does your product complexity create a moat. Are there switching costs? You know. So one would be no moat. 5 would be a moat, right? And this is important. You might be asking like, Okay, well, why is this important? Why do I care? Right? It could be important on things like, for instance, if your product creates a moat where the switching costs are really, really high. Maybe it'll need to spend a lot of time thinking about renewals. Because, yeah, maybe renewals are, you know, like, if the switching costs are really, really, really, really high?
Yeah, there, there may be other things that are getting in, you know, that are helping with retention that have nothing to do with your effort. Right? And if the product is not very easy to get adopted, you may need to put more focus on adoption. Right? If your product is very, very requires a lot of customization to get live. You may need
support engineer like onboarding engineers. So it may really dictate the type of person that you hire as well. So again, I'm not. Gonna I'm gonna have you do this one later, and and we're gonna go on. So
what you're gonna do when you finish all of those. And these are just thought exercises. I'm not the, you know, the the actual specifics may not be perfect, and it's less about being perfect and filling out every cell perfect. That's more about going through the thought exercise.
At the end of all this you should be able to see some patterns right when you look across all of these exercises that we're gonna do. You're gonna start to see some patterns.
And those patterns are gonna help you define what act you're in and these are just examples of acts. You were gonna define using your own language, using language that the or your organization understands. and and then, and you're gonna write it down. And one of your homework exercises is gonna actually be to write down for right now, what is the the app that you're in?
What's the mission? Therefore, what's your mission? As an organization? One of the most important things that you can do right now? And how does that determine how you need to think about your team, the types of initiatives you may be focused on and advocating for asking for, you know, asking for investment for the Kpis that you may be measuring and who you need to be aligned with the most. So.

for instance, okay.
I'm gonna these are all examples. This is not a this is not a this is not just like a temple. You can just take and apply. These are all just examples. But, for instance.
you may be right now thinking, okay, the most important thing that the Cs team can do right now is provide customer feedback. Because we are still trying to figure out what the right Icp is, what the right product market fit is. We're still trying to get the product. You know, to you know, to be a home run. We're just. We haven't kind of hit that flywheel yet. Right?
So what could that on a team that might mean you need to have really low? Csm, ratios, right? You you may need to get really really high touch with your customers. in order to get that feedback that might mean you need to focus on you know, regular Qvrs, or you may need to focus on a really incredible voc program.
or you need to create an advisory board or a community to get that feedback. You know your kpis might be something like, you know. You know. Yeah, the percentage of the features that the customers asked for that are built right and you know. Maybe one of your initiatives is building a feature request system.
your kpis might be you know. The first 30 day, Mps, or number of escalations or something along that lines. And maybe the most important team you gotta get aligned to in this case is product potentially sales. If you think the reason why. The you know, if you, if you feel like your sales, are selling for the wrong Icp potentially sales. But this is just an example. Right?
Let me go down to a different one, just to to build it out. And then but, for instance, let's let's just say you know, your focus is on driving efficiency, right? That you know you got your whole post sales motion pretty well dialed in it's just too expensive, right? But you're but you're doing well across the board. Adoptions. Fine retention is fine. Your Ndr. Looks pretty good, but you just need to drive more efficiency. Right?
Maybe now, you're really focused. Maybe your team change needs to be gotta start start considering offshoring right? This may be the time to start looking at where you can offshore, or where you can do more, one to many, or where you can do more self service and remove team members altogether. Maybe some of the focus that you do is detailed time studies. I did a detailed time study once of our onboarding team, where we literally measured
every minute that they were spending on and on, you know, in a in an onboarding engagement and where there was doubt where there was dead time, where there was inefficient time, where there was too much time. We did a very detailed time study, just so we could drive efficiency and drive up productivity. The onboarding team, you may. Kpis might be productivity level of effort, caps, etc., and the team that you may need to get really, really close to. You might be like your
operations team or your It team, right? Or your B, it, team? So these are just examples. Again, these are not. This is not perfect, but these are just examples. Of how the app that you're in will dictate, how you think about your team will dictate? What are the initiatives that you're gonna focus on? What are the things that you're gonna potentially ask for funding? What, Kpis, you might be measuring.
And you know where your most important alignment in your organization are. And again, this doesn't mean you don't do other things. Okay. I am not by any means do not want you to take away from this class that, like everybody, should focus on one act at a time, right? It's impossible. You're gonna have to do other things.

But
When I was in an act where my focus was more on efficiency.
what I was presenting, and Qbrs to leadership, or when I was presenting to the board. Yes, we were still getting customers live. And yes, we were still doing cross cell and upstairs, and yes, we were still improving Nps and all those other things. But I talked about efficiency more than any of the other things. Right? And so this is really more about where your focus is not that that this is your only focus? Okay, okay. So
now that we understand our act and what app we're in, we can start to build our org, our kpis or okrs, etcetera. Right? So let's shift a little bit into some org considerations. So I believe that a chief customer officer should report directly to a CEO or a coo I believe that pretty strongly. And we're gonna and this is gonna be an interesting
this can be an interesting debate. And I wanna hear from others in a second but if it reports to the CEO it might look like something like this, right where? You have. You also have a CTO or a Cro and a Cmo or a Cpo and a Cfo, and maybe they're not all C levels. Maybe they're all Svps, or maybe they're all Vps right now. You know, you get the idea. Somebody responsible for for post sale customers, someone responsible for the technology organization, someone revenue, someone marketing, someone people and someone finance right?
If it reports to the coo, then it tends to look something more like this, where the CEO might have the the people and finance and all the the the technology, the R&D but the coo has, like the full customer journey from marketing sales, you know, revenue. Post sale right? This is pretty common as well.
When I started at toast we were the first one we were this and then, as we scaled, and when we went, when we went public we moved to this.
II know there are other models out there. I'm not saying that there aren't other models out there. At the more. The other one that I'm seeing a trend in is some of the post sales functions and potentially even the post sales. leader reporting to the Cr, that is something that I'm starting to see a trend in so what I would love to do real quickly
is I'm gonna have to do it. And I don't have a polling thing because I forgot to put a poll thing into this slide. So I'm gonna do a super informal one. So I'm gonna try to see everybody, or you can just like throw it in the chat. Okay, if you report to the CEO,
throw something in there, or yeah for throwing the chat. Who you report to Cro Cco.
CO. See a lot of CEO. CO,
I see a couple of crows
oops. I'm moving to Cru. Okay, more cros than I thought.
wow! A lot more Sierra's. And I thought, Okay, so the trend is true. The trend is happening. So for anyone who reports to the Cr was that always the case? Or is this new?
I'd love to hear from anyone, and maybe someone who it's new. Maybe it's like a shift, and why
II can speak to that. I I'm moving from the CEO direct directly to the Cro. I mean.
we didn't have a cro before we were at that mature stage, or just getting a cr now. And that's going to bring in customer success to that as well.
Just given the stage and our product as well like we have do have a really high net dollar retention, net revenue retention. So
a lot of our program is focused on the upsell cross cell. So aligning to directly with sales makes a little bit more sense in our organization which is creating that shift.

Yep, and it is not. It's this is this, this trend is happening because of that trend is happening because Ndr is becoming important. Companies are finding and they're realizing that as they scale more of their revenue comes from cross sell out, sell on retention than from new business. And you need to have somebody responsible for all of revenue. So why wouldn't you just have the tro like, make sense, be responsible for all revenue, including customer revenue, and I don't. And I

there's a lot of value in that I think you you do lose you get a you get the right revenue focus. If it's reporting to the Cra you you sometimes can lose a little bit of the customer focus when that happens. Like the more the customer experience focus when that happens and so you're gonna have to figure out how to compensate

for that. If if the if the focus ends up being a little, you know a little bit more skewed towards revenue. Again. It's not uncommon for this to happen.

you know. I agree. If the Sierra only some, Mike, you said, if a serial only has sales to glorify title. I agree right now. Some crows really are extraordinarily capable of managing a Po. You know a new business as well as a post sale, and as well as the customer experience. Mike challenge, you know, to to everybody would be okay. Well, who's managing the customer experience right? And

if if it's under the cro, then who is? And we're gonna talk about this in class, the last class class 8. But like, who's the champion for the customer? Experience? Not just who's the champion for ndr right? It's very clear that someone will be a champion for Ndr. But who's the champion for the customer experience? It can get lost sometimes of reports to the Cr. Any other things that you guys are seeing

either either challenges with the reporting structure or things that are working with your reporting structure that you want to share.

So Dave mentioned. It has to be the whole Gtm leadership reporting under the Cro. If it's

if it and I agree with that, that's kind of what I meant by this. If that was the the example that I showed around, I called it a I called it a

I called it the coo, but essentially it's, you know.

if someone is M managing the entire customer lifecycle, if that person has an r instead of an O, okay, fine like, you know but if it's just sales and the Csm function, that's worse, it can get a little dangerous, and and things can get lost if they're managing the entire customer journey, then kind of customer life cycle, and they care about the customer experience. Then I don't care whether this is a cro title or C. Co. Title kind of depends on the person in the seat.

And II agree with what Dave said. The problem is, a lot of Crs are only trained as traditional Vp of sales. And that is the challenge. And I'm talking about yeah, it can work. If that person is, you know not just thinking about sort of traditional traditional sales. In the more the classic sense. Okay, so other teams.

just for the sake of time other teams that I've seen under a Cco, that again.

again, if you if you're if you're currently reporting to a Cr, and that Cr is very sales focus. Only you know this sort of here in lies some of the challenges, right is. And then, you know who's who's managing implementation onboarding? Who's managing professional services? Who's managing support? Who's managing customer education, customer training? Who's thinking about enabling all your Cs professionals, especially your support? Team, that needs, you know, extraordinarily detailed technical knowledge.

way, more detail than like an se would need on sales or a sales rep would need. Who's looking at your operations, and all the systems and tools that you need to manage. The post sales function like you might need a project management tool to manage implementation. You might need
like a Cs tool like a gainside or a catalyst or tatango you might need a call center technology. You know, case management. You know a bunch of stuff there's we're gonna go deep on support with a lot of tools in support that they use right? Who's managing the customer experience of voc? Who's doing community? Who's doing customer marketing, etc.? Right? You know. So
these are. There's a lot of functions that can go under a chief customer officer. Which is yeah, I believe I I'm a fan of this person reporting directly to the CEO and owning everything on this list. Other considerations you need to think about when you're building your org right is specialized versus generalists. Right? Does your Csm. Do
on boarding also, or are you ready for to, you know, get some specialists in place? You know. I look at this. Really this to me, people always ask me this question about specialized versus generalist to me, it's just the math. Yeah, it's yeah. If you need to. Do. You know
20 you know. Take 20 customers live every week, and you know it takes
10 HA customer to take them live. You just do the math, and if that is all of a sudden now gonna take away from someone's effort on other things. Then it may be time to specialize to. I. You know, I'd really think about my capacity plan. And we're gonna talk about that in a little bit. Probably is one of my my main tools? Especially when I'm aligning with finance. Are you gonna segment? Are you gonna go horizontal?
Are you going to have any paid services. Are you going to have those pre-live services post live services?
What does my capacity plan look like? Hopefully? Everyone knows what a capacity plan is, but it's, you know, it's the justification for every single head. Right? It's how do you justify how much time they're spending on everything that they're doing? What are their daily activities. What's their level of effort? What's the effort it takes to do that thing, that renewal, that upsell, that onboarding that Qvr. Whatever it is that they're doing and then how do you build a capacity plan? So you can justify how many of those humans you need? Right? And
it's really easy. It's easier in support and then in the Csm function. But it is the only way you're gonna get funding from finances. If you've taken it down to a granular level, and you could say, You know, I need X number of I don't. I find that finance doesn't often buy the ratios math on Csms and instead they do buy the okay. Let me show you what the day in the life is and how where they're spending their
time, and therefore how many I need what profiles you need. And then, obviously, who then, who's on your extended team? I'm just gonna make a quick point about the extended team. and actually, I'll make the point on this slide. So I'm just gonna go really quickly through. A couple of examples. These are not every single one, but a couple of examples of the my acts at at toast. So one act was
very, very, very much focused on activation. activation. You know, the thing that everybody cared about were like, go lives. How many go lives? You know, did we get this week? How many next week? How many of the week after? That was a huge focus. So I had a dedicated

onboarding team. That was we called them services time, and and that's really where I spent most of my time looking at. How do I reduce time to go live? How do I improve
improve our book to live? Ratio? How do I? How do I improve productivity of every single person on the services team, and and what does the you know? What does the first 30 days look like? Right? And my alignment was mostly with sales.
At that time. In a different act. Right? The focus was much more around Mps right and and so you know, I added a voc team. I expanded enablement right? And I shifted my my focus in terms of the other leader, who I spent the most time with on with product, and another time
it was on efficiency. And I reduce the number of people in the Cs organization I went to did a lot more one to many a lot more self service. I increased the number of people in support. But offshore. And and really, really focused on
think ticket deflection by partnering with product. And I partner with finance a lot on, you know, helping helping me, driving different efficiencies. Through a lot of that capacity, planning that I talked about earlier, right and and all all along the way. The one of the thing that I forgot to mention, and it's over here in the on the right hand side is my extended team right and
at every single one of my staff meetings, every single one of my offsites. My extended team was always there, and my extended team was finance, Hr customer marketing even though I had people who didn't report directly to me. They were always part of my extended team and invited to every single meeting, and completely, and, you know, honestly felt like
probably felt like they reported to me. on a you know, even though they didn't technically report to me. So think about also who's on your extended team? And are you engaging that extended team? on a day-to-day basis?
And then the last thing. And then we're gonna have a little discussion around this in the last 8 min, and I'll get to the chat questions as well
is one of the one of the things I ask you to do is your homework is AI, you know. Figure out who you need to align the most with. This was this one here, right? Oh, sorry, this one
and this is some. And again, it's gonna change during different acts right. You may align with sales, more product, more etc. Right? So you know, these are. These are just some ideas, and I wanna open it up for some discussion. And this is one of your discussion. Topics as well as how do in your cohort groups. Right is.
you know, how do you? How do you get better alignment with these are the 3 teams that I found that different different acts I had to get really aligned with and so sales. You know my number one. Advice to everyone on on getting alignment with sales is just like, be visible. Spend time with reps, spend time with prospects, be available to jump on a call to help us. Sales rep close a big deal, go, do ride alongs.
watch, you know, see them in, you know, live doing demos and don't just spend time with the Vps sales. Spend time with reps. you're you'll understand a lot more about just making sure you understand. And you're visible. Is important. Figure out what they need. So are they? Are they dying for more leads. Great run, a referral program, you know, create, you know, start a reference program, help them close deals right? And
are you finding that your sales team sometimes send you deals that are wrong, itp, or have a high likelihood of turning, or just weren't the right fit. Then implement a red, yellow, green deal qualification. Right? So say, you know something very simple, hey? If a customer looks like this.

red, do not sell to them. Do not you know it's going to be bad, it will. They will eventually turn anybody's yellow. Okay? Like, be careful. Maybe you know, maybe have a deal desk, maybe, you know. Bring a Csm into the deal before you close it, and green here, go close these all day long. Right?
Know the Comp plan. Know how the sales reps, get incented, know the comp plan in and out, and if you can try to influence the comp plan right? But you can't influence it until you know it. you know, in in sales. Everything's about the Comp plan. And if it's not set up for the whole company and for your to succeed you as as post sales potentially will have the brunt of that and make sure you know the Comp plan. Agree on agree on sla with the product team. Implement a voc program, have interlocks interlocks. We used to have these product level and even feature level interlocks where we would meet with the product team on a specific product or a specific feature, we would get an expert in Cs and an expert in product, and we would they would have, you know, monthly or weekly, or bi-weekly, or quarterly meetings.
where they will go really deep on what Cs was seeing. What the product manager believes to be true. You know we're sharing day in the life you were sharing recorded calls. You know, sharing case data, etc. You know. You know. Institute a program where your R. And D, your engineer shadow a customer. Early on it. Says we had a what we call the stage program, where we had people in the
the R. And D. Department actually spend a day in a restaurant shadowing customers so that they really understood what their life was like.
And then implement a customer buddy program. We would align a pro every pro product manager with an expert in Cs, to share stories and kind of, you know. Ha! And and very casually, more informally. Get to know each other. And kind of create that E, that empathy across different teams.
and then, you know, there's with finance. Yeah, I would talk about this before. But if you don't feel like you're, you know a whiz at the Pml. You know. Get there right. You know. Know your capacity plan cold. Don't just ask for 5 new Csms because the ratio is X, you know, if you have a ratio of, you know, 1 million dollars for every Csm or 2 million dollars for every Csm like that's not going to be good enough.
Right? And you gotta go. You know the inputs to that and remember that their love language is roi. So get really good at justifying through Roi and you know, you gotta get really good at experiment and test before you ask for investment. we. We ran so many experiments and tests. You know I had a hypothesis that you know adoption would lead to this. And okay, like, before I go ask for
more people. I'm going to run a couple of tests and prove that out and so that way. I could ask for the investment once the test was proven out.
so let me stop sharing for a second. I know we only have a couple of minutes left. Sorry we pushed to the end there. I was so convinced that I would get this done in less time. And I was like, I'm gonna give it one time back. And
I ended up literally sprinting and talking 10 miles an hour at the end there. So shows you how much there is to cover in this this world of Cs, so I'm not gonna I'm not going to ask for ideas right now on alignment, but I'm going to put it into your cohorts. So some of you are meeting in cohorts tomorrow. Some of you are meeting in cohorts on Thursday. So one of the topics that first topics I want you to discuss is

what other strategies have you guys used to get alignment with other departments. Share with each other hopefully. There's some gems that come out of that. And then your homework is to go through the
The worksheets. Figure out what your act is, and then what you based on where your act is today, what might you need to change about in your organization, your kpis or your initiatives. I hope today was really, I hope, just kind of
was really supposed to be more like, get you thinking kind of day. you know, and sort of challenge, maybe the way you think every single day kind of step out of your day to day a little bit. So I hope it was helpful next week we are diving deep into onboarding with Ali and it's going to be a great session. So I appreciate. And I'll see you guys all in slack.
and don't forget to fill out the survey, because we need feedback. Bye everyone.
Bye, everyone. Thank you.

Class 3
text
Hello! Hello! Welcome, everyone!
I will give you a moment to get connected to audio.
Welcome back! Wonderful to see all of you. Today.
I see a few familiar faces that I've seen in other classes so great to see you again.
My name is Alison. I will be hosting today, so thank you for being with us. Please do not hesitate to reach out to me. If you have any questions you can reach me in the Zoom chat, or in slack, or you can email us that learn at Pavilion. If you'd like faster service, I want to help you as quickly as possible. Please feel free to contact me in slack or in the zoom channel.
Alright! Welcome to week 3 of Cco. School for those of you that are here with us for our live session. If you are willing and able, we'd love for you to turn on your camera so we can see you today. We're hoping for engaged class. So if you do have questions, we will pause throughout, and you can also raise your zoom hand or come off of mute when we do pause alright without further ado. Let's get to the good stuff. I am very excited to welcome Ally. Ally is the chief customer.
the chief customer office at churn 0. So Ali is, gonna give us a deep dive on onboarding today. I will pass it right over to you. Thank you so much for being here.
Hello, everybody! As Alison said. I am Ally Temple to scorn, and I am a 2 time chief customer officer. My name is also Alison. But I go by Allie. The only people that call me Alison is when I'm in trouble. So it's definitely ally for our session. I have a couple of disclaimers to go over before we get too much into the content.
This experience is, gonna be much more enjoyable for you as well as me if we make it interactive. I think the worst thing for anybody sitting around on one of these is to have
a bunch of slides just presented to them. So the way I've kind of organized this to make it effective for us to do this is, you will see that there are section breaks throughout the presentation. Once I've covered that content, that's a perfect opportunity for you to ask a question maybe related to that content. If you have specific questions that are related to an anecdote that's happening with you right now.
or specific to something that's going on in your organization that you maybe wanna want some help with or want some thought processing on. We can do that. I'm gonna save a little bit of

time. After the session, after my content. And we can go over specifics company specifics if that works for everybody.
The other thing, the other disclaimer. I wanted to talk through was, it's really hard with this amount of people to know everybody's experience level. And just how familiar you are with the concepts of onboarding. So this content is what I would like to say. A little bit of elementary stuff, 101 that you probably already know.
combined with some more advanced topics. And this is when I start to get in those more advanced topics where I'd really love to see
the introduction by all of you with questions and comments.
Okay? And then the last disclaimer I have is that I have a pretty quirky sense of humor. So I apologize in advance for any of my jokes that don't land
alright
step.
Let's go on to our agenda.
Right? So this is what we're going to cover in this session. We're gonna talk a little bit about what onboarding is we're gonna talk about why, it's important. We're also gonna talk about the difference between onboarding and implementation, and there is a distinct difference. And I talk to people all the time who have a lot of experience and customer success and a lot of experience and implementation. And they use these 2 terms interchangeably.
Words, matter, words are important. And so I wanna make sure that we understand the distinction between those 2 things. I'm also gonna talk about the concept of methodologies and why I think they're really, really important. We're gonna get into. Probably my favorite topic, which would be to charge or not charge for implementation. And then we're gonna talk a little bit about adoption, which I think is something that is kind of left out in the concept of onboarding
alright.
So here we go. So these are the section breaks that I talked about. This is the this is the opportunity when we go through the rest of the content for you to ask questions, and I already told Alison that I have a propensity to talk a lot, so please feel free to interrupt and use this, because I will probably forget that we need to have a a moment for questions. So
please stop and and interject.
okay.
I love this description of onboarding, and the reason I love this description so much about onboarding is because it talks about customers. It talks effectively about people, it talks about training, and it talks about support. And at the end of the day, that's what onboarding is really about. It's about people. It's about the software. And it's about how you are optimizing your software to meet your customers needs.
So when I think about
onboarding, I think about onboarding as a program, right? And when you think about programs programs have a defined start. But they don't necessarily have a defined end.
And the other way to think about onboarding is it's really about the people. Re right? You onboard people.
So why is onboarding important?
How many people have heard of the concept of failure to launch

at at the
like the speak.
You're very good.
It's failure to line
Hi, buggy and.
Military outfit.
Sorry.
There was a sound issue. I wasn't sure if it's me or.
Can everybody hear me.
Yes, I think it is correct. We just had a quick flag, but we are back.
you know.
Okay.
So failure to launch is something that happens. Quite frequently.
If anybody is not familiar with Donna Weber, she has written a really great book called Onboarding Matters. If you're relatively new to customer for success, or you're relatively new to implementation and onboarding, I highly suggest that you purchase this book?
Hello!
Above
what I found very interesting.
The turn in general comes up about a hundred 30,
6 billion dollars. That is not blowing when you think about how much companies lose their turn? Well, about 53% of it is related to failure to launch. Right? It's po onboarding. It's a week relationship building, and it's poor customer service. And I think if any of you went through the Sassacore of 2023, that was a really perfect example of when money is not flowing. What is the first thing that the Cfo is going to do? They're going to look at technology that users have not adopted and are not using on a deal
daily basis. Right? So hopefully, none of you experienced this, but 2,023 was a tough year, and it was a tough year for renewals.
and that starts with poor onboarding right? If you're not proving the value, you're not providing the value. Your Cfo is going to want to take away that software.
All right.
questions
any comments, concerns, questions on that one. Anybody disagree.
We are caught up in the chat, but if anybody would like to come off of mute, please feel free. We'd love to hear from you.
Right good.
None of you thought that was controversial.
Ali. I'll come off mute. Nice to meet you. One thing that I grew up in with it.
global system integrators with Anderson and deloitte pre-white decay before customer success was even a word. And the difference between onboarding and implementation. I I'm looking forward to hearing. I agree, or I I respect that there's a you have a distinction. I'm looking forward to hearing it because.
We used to do.
Implementation before there was even. You know, onboarding was even

even mentioned. And it was all part of implementation. But I'm excited to hear how you, you distinguish it.
Alright, I'm good, Charlie, this is great. This is the kind of interaction I'm hoping for, because I grew up long before there was customer success as well. And I learned about implementation when I was working at computer associates. So I I I get it. And I'm a long time technical project manager. So you're gonna see where I think there is this kind of distinction between the 2. So we're gonna cover onboarding first, and then we'll talk about implementation.
Thank you.
I had a question about one of the earlier slides. Hi, Katie Bond here.
hi! So part of your definition of onboarding, and I jotted it down because I thought it was really interesting and different, and in some ways, and how I defined it, but include, I believe. customized training sessions. And I'm curious if you feel like that customized one to one is an essential part of it. Or if a
successful onboarding program can have more of a
self serve on demand.
generalized training. How do you think about that? As part of the definition.
I think that is an awesome question. Thank you very much for that. So here is my belief. I think personalization can actually be done through automation. I don't necessarily think that you have to have one on one training. And we're gonna talk in a little bit more about what I think about training, and how I think you should think about training and not boarding.
But yes, personalization to me doesn't always equate to one on one.
Looking forward to learning more. Thank you.
Yeah, cool. Alright. So, Charlie, back to your question. What is the difference? Right? So onboarding again is strategic in my
a. A.
In. It
is the.
I think, really, it sounds like, we're okay.
How are women is very tactical.
Yeah, I just noticed that. Sorry.
No no worries.
Hear me!
Yeah. It pause when you were answering. It lagged when you were answering Charlie's question. It's back now.
Where am I?
Yeah. Keeps going in and out like, you know. And is there another audio you can use? Cause? I think it might continue to happen.
There's not another audio I can use. Unfortunately.
Okay, alright, let's hope. Hope for the best.
Maybe it sounds like it's just the Internet. Perhaps maybe it was just
the Internet was lagging.
As a workaround maybe uses cell phone dial in.
I don't know.
Yeah, we're good. We're going.

Let's keep going and see, you know, if it still becomes problematic, then we'll we'll pivot.
Thank you, Ellie.
Okay, so let's talk a little bit about then the difference between the difference around implementation being much more tactical. Right? When you think about implementation. There's a defined start of the implementation, and there's a defined end of the implementation right? And the defined end of that implementation is you have launched the software into the customers. Environment, right?
Implementation is about software integration. Where, again, onboarding is about the people that you are training to use the software.
Alright. Let's get into some more about
onboarding.
Okay, I know everybody. Here is a huge fan of customer journey maps, right? Everybody knows what a customer journey map is all of you have one, and you look at it on a daily basis. Right? No, of course you don't. But here's the thing about journey maps. They're incredibly important. And you actually do need to use them. And I think one of the things that we have a propensity to do is we have this propensity to
intertwine. The idea of a customer journey map with process flows. A customer journey map really is about it should be pretty high level. It doesn't need to be more than one to 2 slides, and it really should be about how your customers are thinking, feeling, and experiencing their post sale journey.
and to me you cannot define onboarding until you have figured out what your customer journey map is.
and for me, personally, I've talked about customer journey maps in the entire 20 years that I've been working in post sale, and it didn't really dawn on me until I was talking to a team one of my teams recently about what we were trying to do for our customer right, and they kept telling me they didn't get it. They didn't get it. So I kept preparing all of this
these strategic decks and going over in more detail the strategy. What we're trying to achieve more numbers, more metrics, and these still didn't kind of get it, and I took a very large step back, and I redid our dream map.
and once I presented the journey map to the team.
It was like a light bulb they like finally got it, and I think the thing for me.
the light ball for me. My Aha! Moment of that was that you know our teams
haven't necessarily been at this as long as we have right. If you think about the fact that our teams are maybe one to 2 years out of school. Or maybe this is their second or third job. They haven't necessarily
dog on this.
See, people are.
They
have heard the term journey map of that journey map. So to me, onboarding starts with your journey map.
Now, here are a couple of examples of a journey map right? And I like these because this shows you the difference between journey map and a process flow right? Because the journey map here is talking about what the customer is talking about. What the language of the customer is.

This is an example. More of a process flow, because it's talking about what you.
as the vendor, are going to be doing for the customer
that make sense
again. This is talking in the language of the customer versus what you as the vendor, are doing to the customer during those different touch points.
So again, I know everybody loves journey maps.
Everybody hates talking about them. It's incredibly important to use them and to use them when you're thinking about onboarding and implementation.
Okay.
so let's talk. Let's talk now a little bit about what makes for a successful onboarding experience. And here's where we're gonna talk, Katie, about some of that training that that you brought up sales handoffs.
They are painful. Everybody hates them. I'm gonna talk in more detail about how to make them less painful. But you have to do them, and you have to have a process around it.
I think the thing that I have learned is implementation. Summaries
are really really important. They're really good customers. Love them, and I, personally haven't done them as much as I should have done.
I think what you get from an implementation summary is effectively. This is what was implemented. This is what we didn't. This is these are the features, maybe, that we parking lot put another parking lot. These are the things that we think the customer actually has to come back and do, and these are the additional features that we think the customer could benefit from.
It is a really nice outline
for to hang in
over to Csm.
To help start with the adoption.
And then the the angle of training is, what kind can everybody hear me.
Yes, it glitch. For a moment there was a couple of people suggested. Maybe if the video was off, I'm not sure if that would help you or make any difference. But I don't want you to have to do that.
Alright! Are we good? Is that better?
Oh, yes, thank you so much.
Alright. Well, that's good. You don't have to see me so when we talk about designing the right level of training you do wanna think about customization right? But you again, wanna think about how are we customizing that to the customer? And should we be trained? Should we be charging for that
level of customization right? There's nothing that says you can't charge for additional training of your customers.
I think one of the other things that we don't think enough about when we're talking about onboarding is
what happens to those new users that come on board
right? So what is the plan? After we've actually implemented our customer. Actually, we've brought them. You know, we've sold the software, and we've done the implementation. And

we've done some of the training. And we've done some of the adoption work. But what happens to the customer when they hire new people? What does that look like?
So we need to develop a plan for that. Either you have a site. You have an Lms that's dedicated to just new users. You do a recording specifically for new users, or you develop a plan with your customer around. Train the trainer.
Now, Katie, here's here is where I I am very passionate about training should be done a lot, and if possible.
in product, I think. I was just having a conversation the other day with somebody related to AI, and they were talking about? Well, you know, is AI gonna replace customer success. And what are the implications of AI other than taking over the world? And to me one of the things that I think is really interesting about AI is, as AI gets, more mature, the ability to train
your end users in product through those learning. Those learning, those Lmmm, Lm, models, I think, is going to be really, really interesting. And I don't think that
product teams right now are spending enough time and enough energy and figuring out how to leverage their product. And these in product apps to train people right there in the moment. I think that is a bit of a revolution that we're gonna start to see even more of
when it comes to these new advanced technologies. So I would say, invest early invest. Now, there are all kinds of tools out there that you can leverage today if you're not already leveraging them. But that, to me, is the future of of training
for onboarding.
And then the other thing that I've had success with in the past has been the concept of training the trainer. So I think it's really important that
you get
your customer to buy into training their end users. They are going to know the features that are most important to their end users much better than any you know than anything you can do, or your Csm. Can do, or your enablement team can do
leverage those folks and have them ride along through the implementation so that they can actually see what features
have been implemented and which ones are the most important.
And I have noticed that when you actually do that level of train, the trainer and you get those advocates early on your adoption, numbers are significantly higher
because they've bought in right? They bought into the fact that
one of their coworkers is already using the platform or the software.
Okay. I told you. I was gonna take a pause on the sales handoff. Right?
So now we're going to come back to it.
Here's the deal in my experience. There are always in a company those aes that are fantastic. We love them all.
Who fill out everything in salesforce. Their salesforce is is beautiful. They feel that they fill out every single field. They do a fantastic job. And unfortunately, that is not necessarily the majority of aes right? And so a lot always gets lost between what happens in the sales process and what happens at the start of onboarding
and it's frustrating to customers. It's frustrating to implementation and Cs teams. So my recommendation is always try for a conversation. It doesn't have to be a 30 min conversation. It

doesn't have to be an hour. You can have 15 min with an Ae and get a lot of information out of that engagement.
And to me, it's about focusing on what's not in salesforce. It's focusing on those intangibles. So who's my advocate? Who are my detractors, who actually didn't want us to purchase this software right? What are their expectations
and
ask about what potential roadblocks you think there are. What are the risks.
you know, for us? When I was at turn 0, it was interesting, because.
we would inevitably hear from the salesperson. Well, why did they? Why did they purchase the software right? Why did they buy the platform? Oh, well, because they wanted to stop. Turn. Well, you're not gonna necessarily stop. Turn from a Csp, right? So you need to have you need to have your customer success managers in your implementation team asking those secondary in those tertiary questions like, what is the actual business problem? And if it's related to turn. Do they actually know what's causing their turn?
Here is an example of
a very, very simple handoff checklist, right? This is something that the Csm can own the implementation team can own, and this just goes through again.
Very simple.
What you want to ask the ae.
I am a big proponent of sales handoffs being owned by Cs. This is not something that should be owned by the Ae. They have moved on to the next deal. This is something that the Cs team should be responsible for.
and
it really should be owned by the Csm. It should not be owned by an implementation team. It should not be owned by a project team. It should be owned by the Csm
okay.
questions, comments, controversies.
How are we doing on this.
Yeah, we are right on on time. We are doing great. I would like to give an opportunity if anybody wants to come off of mute. We did have a question from Charlie and Benjamin in the chat. But would anybody like to come off of mute before we address those.
Yeah, I had a I had a quick question, hey? I'm understand. Preserve a Wi-fi bandwidth. But on the previous slide I like the idea of doing that sales to Cs sort of handoff.
Have you found
sort of cut off point when it just becomes.
I guess, unwieldy? If you've got too much of a high volume.
Number of customers coming on board.
Yeah.
You can't quite schedule 30 min slots for any and everything. Is, is it just a matter of
figuring out where to where to prioritize, and where where you actually spend the extra effort to do the the sales. Cs, so checklist plus a 30 min call.
Yeah, absolutely. I think that's a really great great question. Right? If you have a if you've got a lot of volume, or if you're a volume based business. And

you're doing more of a tech touch customer success play right? You absolutely aren't going to be able to have those
physical handoff offs. I think that's when you have to rely on, you know, incenting those Aes to be better about making sure their salesforce data is clean or their Crm data is clean.
Yeah, okay, thank you.
I think the other thing, Ken, that you can do is again. You can do segmentation on just doing those handoffs to the higher value deal.
Yeah.
Yeah. Good thing.
Like question.
Okay, excellent. Well, Charlie asked a moment ago. I thought that customer journey map also included the customer awareness, selection, and commitment activities as well as the post sales activities.
You know, Charlie, you you can having been having been so far in the weeds of
the Post sale world for such a long time. You're right. A traditional journey map should include everything. But I wanted to focus in a little bit more on what's happening in the post sale world, because those are my controllables, whereas I don't necessarily have as many controllables in pre sales.
Not that we shouldn't obviously as a Cco. We should, but sometimes we find ourselves not having as much controller.
Great question.
Excellent. Thank you. We can take one more if you're okay with that, Ellie, and then we can.
Yeah, thank, you.
Okay, fantastic. Benjamin asks. So is it fair to say implementation is contained within onboarding.
Yes, yes, you got it. Okay. I don't have to do anything else. Benjamin. Implementation is the first step in onboarding. Yes.
alright. So another shout out, and another plug
if you are not following Jeff Kushner on Linkedin from infinite renewals, you should. He has a lot of great content related around implementation. A lot of it is pretty funny as well. And he's just a genuinely entertaining individual but his content is really really good. So if there's anything you want to know about implementation, please follow Jeff Kushner on infinite renewals on Linkedin. But his quote and I love. This is customer retention
starts on day one of implementation, because, quite frankly, if you don't get implementation right, you are not. Gonna get onboarding right? And your customer is not going to retain.
So if you have an implementation that has gone bad.
you have a red customer. It's not an orange customer. It's not a yellow customer, it is effectively a red customer.
So
what are some of the things that we have to think about when it comes to implementation?
do you have a self-service implementation? Are you fully pl
one of the things I was talking to a friend of mine? Yesterday. As a matter of fact, they do about 3,000 implementations a month, and they have 200 implementation managers globally.
That

is probably not scalable, right? So they are gonna need to very much think about how they can invest in a some sort of self service implementation. Now, does that mean that there's never going to be human intervention in that implementation? No, but they really should be thinking about what are more of the inputs that the customer can handle for that implementation than having a human do it.

So implementation teams can get very expensive. So the more you can have product doing your heavy lifting the more you can build turbotax for implementation. If you have a scaled model, the more you should be having your product team invest in that

the other thing you want to think about when it comes to implementation is what level of data ingest. Are you doing

so? How many different systems are you ingesting data from? And are these file imports are these Api connections?

Again, the more you can automate the better you're gonna be.

Also, you have to consider for implementation standard versus custom.

And if you're doing a lot of custom work for your customers

in the implementation phase, you really should be thinking about professional services, because at some point you're really moving beyond implementation, and you're moving into professional services. I always equate. Implementation is pretty standard professional services is where customization comes into play.

I also want to make the distinction, because, as you can tell, I'm kind of fastidious about the meaning of words.

configuration and customization, I think, are 2 separate things to me. Configuration just means you're setting things up for your customer. Customization means you're actually changing things. You could potentially be changing code.

So the next piece of implementation that you have to be thinking about is how much of your process is repeatable.

And I talk to as I'm advising teams and companies. When they're talking about implementation, I inevitably hear the fact that each of their customers

are very unique

and very different, and each of their problems are very unique and very different, and therefore we can't build the repeatable process.

And I can tell you from lots of experience.

serving both enterprise customers and Smb customers that there is repeatability and implementation.

and the more repeatability you can put into play that leads to standardization. Standardization leads to better quality and also leads to faster implementation times.

The other thing that I think is important for people to think about when it comes to implementation is, if you have

a a piece of software. If you have a Saas platform that requires a lot of data as well as a lot of configuration, that is still implementation. Don't break those things up. I have been at companies where they will have an implementation team, do data, and then they'll have a Csm. Do configuration. And what I have seen inevitably is, that is a really good way to

Have your customers not necessarily have anything configured in their system, and that then leads to failure to launch.

and then I will finally state for the record controversial statement.
Csms just aren't good at implementation. It's just not what they're built to do. They are relationship managers. They're very good at relationships. They're very good
at being consultants. They're really good at understanding business problems. They're really good at defining value. They aren't necessarily good at implementation.
Now, if you want to get into the whole debate around, how technical does my Csm need to be, I would make the argument that if you have really, really technical Csms, they're actually not Csms, they're technical relationship managers. And that's a different role.
Okay, Alison, how much, how much controversy, how much stirring of the pot do I have right now.
We have some fantastic conversation going on in the chat, but specifically related to a question if you'd like to take one. Darren did have a good question pop up that others are interested into.
Great! Let's do it.
Cool. Alright, Darren asks, why are most sales processes lacking that introduction and engagement? Or are they.
Why are most sales processes lacking? What
engagement? Sorry.
A few minutes back we just discussed
getting Cs introduced at the appropriate point of the sales cycle. I just find that.
Yes.
So recently. It's just missing that. And there's this card. There's this clear breakpoint or wall between
the sales process. And then the actual
Cs team being and involved.
So
I hmm, I'm gonna I don't know. How should I say this? Right? I think it depends. It really depends on the strength of the sales leader. I think really strong sales leaders understand the benefit
of getting a Csm. Engaged early. If you have a strong and experienced sales leader. They get it, and they'll want the Csm. There, if you have somebody who maybe is a Tad more junior, or this is their first senior role. What they are going to be hearing from their Aes is that the Csm may say something
where the implementation team may say something that could hold up the deal.
And so I think.
or people that maybe don't have as much experience, it's about getting them comfortable with what your team actually can do and how successful they can do. And one of the next things I'm gonna be talking about methodologies will help give those
more junior sales leaders confidence that your team knows what they're talking about.
Does that help.
It does. I think it's a good observation.
I'll come off mute with a comment. Here, just to to on that, you know. Why, doesn't
you know? Why can't sales do a better job of handoff. And I agree

100 with Ally on. You know, it's really around the strength and the experience level of the sales leader. And you know. In last class there was a, you know, a lot of concern about Cs reporting into sales. And if you have that
sales leader, that's not that experience. It's not data driven that hasn't done any delivery that hasn't really focused on on the post sale. Then then that could be problematic. But I think these days you're seeing more and more sales leader who leaders who have done delivery implementation came from consulting. You know, have.
you know, have that that background for the post sale, and I think there's, you know. Then they would be much more interested in driving a frictionless handoff. You know I'm I'm super interested in driving. If I'm a sales leader, I'm super interested in driving is frictionless handoff between sales and Cs.
and I think it needs to be between management of both functions. So, but I think these are great questions, and continue to ask them.
Yeah. And I think at the end of the day the the best sales leaders that I have seen are not interested in just the success of the prospect.
They are interested in the success of the customer.
Right? So they actually. And they're interested in the success of the business. So they understand the importance of retention. They understand the importance of Cac, the amount of money that it is costing them, and we're gonna talk a little bit about where all of this sits as regards to Cac versus cogs.
And so the more you have those sales leaders that understand that, and a lot of them do, and they're getting much better about it. And you know I have certainly seen crows that
I would be happy to report to, even as a chief customer officer. They're that good because they again understand
the entire business.
Okay, let's talk about a couple more keys to success.
I am a big believer and a big fan of project. Kickoffs.
I think they are of equal weight to those sales handoffs. Right? And again, I know in a scaled model project. Kick offs can be can be very difficult. I think there's still ways to do them. I think there's way to automate them without necessarily having to have too much interaction
with a human being. But you have to at some point start the implementation.
You have to actually go over what's gonna be successful for the implementation. You have to make sure that everybody aligns on what's gonna be successful for the implementation and we talk about this all the time as leaders, but I gotta tell you how many meetings do you all go to, and especially customer facing meetings where there's no agenda.
It. It pains me every time it happens. But let's be realistic, it happens. But that is one of the things that you have to make sure your implementation teams are doing is that they're having an agenda, and those agendas are very, very specific to what's going to be accomplished in that Kickoff meeting.
then the other thing that people are hesitant to do at times, but I still think is really critical, is reviewing the contract
and the reason I am a big believer in reviewing the contract is because sometimes you know it, it's definitely different for Smb's. But if you're dealing with the enterprise a lot of times. Procurement is handling the go negotiation of the contract and inevitably procurement is leaving

something out of the contract that your champion actually wanted, and then didn't bother to tell the champion that they left it out.
So reviewing the contract, I think, is important, because it is a confirmation that everybody's on the same page of what they bought. And then sometimes it's an expansion opportunity before you've even gotten started.
And I think this is the best time in the world to talk about your team, your whole post sale team, what everybody does, what their purposes?
And
who's in charge of what right. It's a really good time to introduce the concept of support.
One of the things that we talk about in the post sale process is how much everybody hates and handoffs. This is a great way to avoid handoffs when you talk about who's responsible for what? Right off the bat
and then I have to talk, because this is the pet peeve of mine, so forgive me, but I have to talk about the surveying of your customers when you are surveying your customer after an implementation. It is Csat. A Csat survey is transactional. An Nps survey is relational. Do not do not survey your customers after implementation with an Nps survey they have not experienced.
Your full company yet
an Nps survey is how your customer views their relationship with your company, not just how they did in sales, or how they did an implementation right after implementation. They've only gone through 2 to 3 touch points.
Did that generate any good discussion
else, and I love that that tends to be a controversial one too.
There is. There's a lot of great commentary going in the chat. I'll tell you what. There's lots. Oh, here's one do you? Wanna do you wanna take a quick question, or do you want to keep moving.
No, we can keep moving. I know we've got to.
Okay.
But we can if anybody wants to. If anybody wants to. DM me on Linkedin about Nps. Versus Csat, I'm happy to have that conversation.
Love that great lots of sidebar combo going, but all good things.
Okay, let's talk a little bit about why implementation failed.
So who here has never had an implementation? Go off the rails?
Do do I see any hands?
Okay, implementations go off the rails.
But I found a a really interesting research paper from the Project Management Institute that talked about why exactly implementations fail. And what I found to be so interesting about this is that 60% of implementations fail because of controllable reasons. And these reasons are the responsibility of the vendor, not the customer. I think this is fascinating, and I have to say, having been a technical project manager and having run implementation teams. This is spot on.
When implementations fail, they fail because we haven't done a good job of listening for requirements.
And
we haven't figured out what the objectives actually are of the projects. And my big favorite is we haven't identified the risks, and we haven't thought about risk mitigation.

So how do you recover from a bad implementation?
weekly status reports. So this is another thing that I know people will say, well, this is just kind of you know, project management, one on one or implementation one on one. Yeah, you're right, it is, it is. And it's funny. I am guilty of this myself. Having run implementation teams.
and I will inevitably ask them, hey, you know, where's our weekly status? Reports to the customer, and I get, you know I get the look of wait. What do you mean? We're actually supposed to be doing weekly status report? Yes, absolutely. And even in a scaled model there are plenty of tools out there that can help you. With these status reports I find them to be critical. I find them to be really helpful to keep the project
going.
and it doesn't again. It doesn't always have to be a meeting
but you need to make sure that your customer understands exactly where they are, and the implementation in the project.
And the other thing that I like to do
is I like to ensure that it's not just the project team who gets these status reports. I like to make sure that the buyer gets the status report, and one of the things that I think is so helpful about that is that, and I've seen it time and time again. When things go red, the buyer immediately jumps in and helps to get things back on track. If they're seeing these status reports.
The other thing it helps to mitigate is when the buyer, you know, tries to come in later in a in a project and say, well, I had no idea that you know it took you
12 weeks to get a data import from my team.
If you are ceasing the buyer on all of these status reports. They know what's going on.
I also think one of the best ways
to mitigate any kind of bad implementation is to make sure that you have defined what the escalation path is upfront.
You do it in the project, Kickoff meeting, and you make sure that that escalation, whoever that next level is above your implementation manager or your implementation analyst jumps in sooner rather than later. I think a lot of times.
both as leaders and as more junior managers.
We wait. We wait for solutions as opposed to probably problem solving, together with the customer, and I think the customer always appreciates coming in earlier and problem solving together than they do, waiting until you come back with some, you know, 20 slides.
20 slide deck that talks about all the different things that you're gonna do.
But once you have developed that remediation plan, make sure that you keep that in the status report, and you report out on it weekly.
Okay.
I'm gonna take a breath and a sip of water and see if we have any questions.
Fantastic. Do that, please. We do. We had a couple of questions come up, starting with Katie and Katie. I hope this question wasn't already answered since you asked, but curious as to why the project kick off is happening at the implementation level and not as a kickoff to the overall onboarding program.
You can, Katie. You can. You can do it that way. You can talk about
the onboarding. If you have a very sophisticated onboarding methodology that you come up with. And you do the. And you talk about what the training plan is going to be and what your

adoption strategy is gonna be. I think the product Project Kickoff can happen there. But again, that becomes a program kick off right? That's not necessarily a project kickoff, for the project is usually
related specifically to the implementation, but you could certainly do a kick off
at that point.
Thank you.
Excellent. We can take another. We had a question from Emmanuel Manuel. This is more of just a thoughts. Your thoughts on Csat versus ces, or another survey.
ces Emanuel being.
Customer effort score, we, we, we debated back and forth what?
What to use to measure onboarding? And or, sorry, yeah, to measure implementation, successive implementation or satisfaction of implementation. And
we, we went back and forth between Cisa ces nps, and was curious to.
So, yeah.
Think.
Yeah, I'm curious to what people think. I I have. I have a preference, but I'm curious. If anybody has
to me, I think customer effort score. That's a good metric to have. But again, that's a little more internally facing versus
a cust. A Csat score is is
externally facing right. It's what the customer feels. They've experienced
any any takers on that.
If not, if not, we're gonna move on to methodologies.
I would think.
And okay.
So I was gonna chime in. I would think that because it cause the amount of effort that a customer needs to
to. You know, take on from their side depends a lot on the on the the product. And you know what what the onboarding the implementation looks like.
And so I would think that that would be an interesting gauge
post onboarding, because you want to make it as easy as possible to use.
But it might not be a good
metric in my view, for to measure onboarding, because some products just require more customer effort. And to me it's more about. Did you set the right expectations, you know, during the sales cycle and at the kickoff around here's how much time we're gonna need from you. And here's what the you know, here's what your level of involvement will look like
if you set the right expectations, and you met that, and then you also at the same time delivered on everything that you said you would do. Then to me it feels like a csat can measure
all of the above.
Yeah, that's a really really good point. Yeah, because you're right. Those expectations may not be being set correctly in sales.
Right?
It's very easy. It installs itself.
Yep, exactly!

Echo,
Excuse me alright.
Let's move on to methodologies.
Alright. I'm a big fan of methodologies. You can add methodologies for onboarding. You can have methodologies for implementation. Quite frankly, you should have methodologies for both.
And
and
when we had to
this discussion around, you know, each of our customers are unique. It's really hard. I kind of come back with, look
every every implementation.
Goes through very distinct phases.
I don't care how complicated or how easy your product is
for an implementation. In particular, these are pretty standard phases, right? You have some level of discovery or requirements gathering, whether that happens pre sales or after the contract is signed, you do some level of design work with the customer that you're working with. You, build it out, you configure it. Whatever you have to do you in integrate or the data files, and then you test and train.
and then you launch right pretty standard.
Why this is so important is because, again, this concept of repeat repeatability and standardization is going to lead to better quality. It's going to lead to better outcomes. And it's really gonna make your teams go a lot faster if they know all the steps involved.
They're just gonna understand where they're going to find risks, and they're gonna understand where things might get delayed.
The other thing that I think is so important about methodologies is they are such great sales tools. When you flash up a couple of slides in the pre sales process around how you do every single one of your implementations, or this is the way we on board our customers all the way through the lifecycle
customers have a level of comfort and confidence that you know what you're doing. And so, Darren, when you talked about, you know, how do you get those sales leaders that are very skeptical about introducing? You know the Cs leader or Csm in the sales process by showing them this methodology by letting them see
you. We have it all under control. We know how to do this. We've lined it all out. We've codified it. We have it in confluence, and we have these full marketing slides. They get excited, and they actually want you to start talking to prospects.
I think the other thing that is very cool about methodologies is that it builds camaraderie with the team.
It gets the team involved when you have them build the methodology. I don't think it's good. I don't think it's good for you as the leader to build the methodology. You need the people that are doing the physical work to build the methodology and they get excited about it.
And they have debates back and forth with each other about what are the real milestones, and how long should these actual tasks take?
I think the other thing is, it's not a methodology. If you haven't written it down. So you kind of codify your work

right? You do. You have 2 different examples of a methodology. You have the very high level, which are more marketing and sales tools. And then, obviously, you have the much more tactical that you would build into a plan.
The other thing that I think is great about methodologies is this is where you can identify the milestones in which you know something is, gonna go off the rails. And then you start to build playbooks, especially if you have a scaled model. If you only have scaled Cs, you have to have a methodology, because this is where you're gonna understand, we're something again
is going into red, and you can then
be able to use whatever tool you're using or whatever
plethora of tools you're using for your scaled model to start automating communication to your customer when they're not doing what they need to be doing for the implementation.
Okay?
Well, let's talk about metrics. So what are the things that we have to be measuring when it comes to implementation or when it comes to onboarding.
so there's time to launch versus time to value
in my opinion, time to value can be very squishy. That to me is a very squishy metric time to launch is a great metric, because it really involves alright. Here is the start of a project. Here is the end of a project. How long did it actually take us time to value is okay. Well, how are you defining the value that you're bringing to your customer? Does it mean that.
you know, 7 people are using the system, or 25 people are using the system. And then how do you define using right? Does that mean it's a login or not a lot, so time to value, I feel, is a little squishy. In my opinion. Time to launch is much easier to to measure. We talked about Nps versus Csat. I think to me, the huge metric that you should be looking at
from an implementation perspective is, how long did the project actually take.
This is where your methodology comes into play. Right? When you think about, hey? We forecasted the project to take 30 days. It's now taken 90. Right? What's happened there? Obviously, something really bad has happened. The
Interesting thing to me about this metric is this metric is great to talk to take back to your product teams, product teams, love of data. And if you can start to show them that your implementations are taking way too long because there's something happening either with your data ingest process that potentially product could help with. You know, the Apis are always breaking. These are things that
product teams will react to much better than saying, Hey, you know, you need to make this implementation process self service.
I think users activated is a better metric than logins.
I think we can all agree that logins was the thing that we wanted to track way back in the day, but in reality it's
what is your customer actually doing in the system that is meaningful.
So here's a good example of users activated for an Hris system. Once upon a time when I worked for a company selling an Hris system. It wasn't simply about
people logging in right because we had a payroll element to our Hrs system. Maybe people were only logging in twice a month to run payroll right? But we also wanted to capture other things like how many people were doing their time tracking within the Hrs system as well as were they actually downloading information about their benefits.

That's more an activation as opposed to just logging in.
And then, obviously, you wanna track how many people have been trained? How long it's taken them to go through training? And what kind of training have they done? Has there been customized training? Has it been train the trainer, or is it an in product training?
Okay.
let's talk now about capacity planning.
capacity planning is not an easy thing to do. It's something you have to do, but it's very difficult to do, and most companies start from a capacity planning perspective with Round Robin. Right? Just who's available? Who has bandwidth.
who doesn't have, you know, 30 projects attached to their name.
which is fine, and that works for a while, but you really have to. I think the power in an effective implementation and an effective onboarding strategy for customers is when you can get to a level of segmentation right? And so when you can start to think about the teams in a much more segmented way, who's covering Smb, who's covering mid market. Who's covering enterprise.
The key, though, to being able to do your capacity planning around segmentation is your sales. Leaders have to be really good at being able to forecast around that same segmentation right?
And that is the trick that will always be the trick. Because if you have
leaders who are just
concerned about hitting a number every month, or hitting a number every quarter. They're not going to be that interested, or care that much about how they get to that number, but the better you can work with them to figure out how they can predict what segmentation looks like. The better the experience is going to be for the team itself and for your customer.
and then the next level, obviously down from that is, are you able to do any kind of staffing based on territories.
One of the things that I think is really a great investment for companies, if they can, is to invest in a resource manager, especially if you're getting down to levels of capacity planning related to segmentation and territory. And even with tech touch, understanding just how much of that work is coming in the door. Where does it sit? Making sure that you're not burning out your staff, but also making sure you don't have people sitting on the bench.
The only way you can do capacity planning effectively, in my opinion, is you have to have it that methodology. You have to actually have your work breakdown structure of how long all of these tasks are gonna take. So that you actually know
what the duration of any kind of project needs to look like.
And then the other thing about capacity planning is you have to review it at nauseam. It will inevitably and always change. So you, especially if you're launching new products, new features.
and as you get better at automating things within implementation or training, you need to be able to adjust that capacity plan.
Okay.
brief break for any questions
on implementation.
Excellent. Thank you. Let's see. Here, we do have a couple of questions. I wanna make sure they're directly related to this subject.

We had a question. Oh, Dave, has your hand up, Dave? Excuse me, you have your hand up. Please come off of mute.
No worries. I got my video off as well. Hey, Ali, great, great presentation. I've got a question related to specifically enterprise onboarding
and I guess what what's typically happened in the past. Is that
they? They don't effectively end when they're expected to end right? So a little bit easier on mid market.
But the enterprise typically find complications. Maybe part of a site didn't go live.
How do you handle that? In your capacity planning so effectively. Yeah, you've got your book of business. You've got your book of onboarding. The billing is kind of delayed for some part of this. So where? Where does that come into that capacity? Planning.
Yeah, I think that's a really good question. And I think, Dave, I'm gonna say, it actually goes back to your methodology. And it goes back to your risk planning with these customers. So you've gotta be able to identify upfront when they're missing those milestones.
And
then I think you have to. You have to be able to build in a little bit of lag in the Enterprise.
From what I've seen and what I've experienced for those customers that are in red.
Right? So if you have an implementation manager that has, you know, 10 red accounts, then something's going on in the way that they're probably managing that project.
Right.
Yeah.
yeah, it's not. It's it's not an ideal. It's not an ideal.
answer for you. If you want, I can take that offline because I have experienced that. And I have a couple of suggestions that might actually help you mitigate that.
Okay? And sorry for a second question folks. I read it in the chat. Basically, a a customer has a waterfall process. We have an agile process.
Who wins.
Oh, so they're making you do. Vrds.
I love that let's talk about that one offline, too, because I do have a couple of suggestions for you. I have lived through that experience. I mean, I think you're gonna default to the customers, the customer. You're gonna kind of have to do what the customer is telling you. If they are requiring a Vrd, you're gonna kinda have to require vrd, but I think there's a way that you can mix a waterfall and an agile process together.
Okay. Thanks.
Okay, fantastic. For the sake of time we can keep going. Since we have about 24 min left. I do have a couple of other questions that we can hopefully address at the end.
Yes, I'm gonna go through this really quickly. I think everybody knows how.
How implementation and onboarding looks in terms of early stage I'm a big proponent of you gotta separate this stuff early. Even in early stage companies. I really do. I I've I've talked about it ad nauseam implementation people and Cs people are not the same thing. Invest in the separation of those 2 events early rather than later, because you're end up, you're gonna end up doing it for scale, anyway.

when it comes to late stage organizations, I think the piece that I want to call out here is I don't think we spend enough time talking about the role of enablement and customer marketing when it comes to onboarding. I also think that
customer marketing can either sit within the chief customer officers purview, or it can sit with marketing. I do think marketing has a responsibility to communicate effectively, not just to prospects, but to customers. But customer marketing is a huge piece of a really successful onboarding strategy. I also think your enablement team shouldn't you just be responsible for enabling
enabling your folks internally they should be responsible for enabling customers as well.
Okay.
let's get to the fun part. Alright, Alison, can you run that poll for me?
Yes, absolutely. Let's launch it. We have a poll, so I will let Ali introduce it. Here we go. You should see it now.
Alright.
Please answer. Now, answer currently what you're doing, not maybe what you want to be doing. Are you charging for implementation? Yes or no?
Great the results are flying in. I'll give you about 5 more seconds.
It's not. It's not a yes or no. It's segment specific.
No, okay.
I like that. Actually, that's great answer, Mike.
I just wanted to make the poll relatively simple.
Excellent. Okay, I'll go ahead and share the results. Now.
this is great. I think we have a really good split here. Okay, alright. So to all of you who said, Yes, thank you. Thank you. Thank you. Fantastic I think you're a little bit of ahead of the game by charging for implementation. And I think that
you can charge for implementation through a lot of different segments. I don't think it just has to be for enterprise customers.
So let's go on to really, quickly. This quote, from pwc, I think, is really important because I think it underlines
what I have always known to be true people. Will people define value in things that they have to pay for. People do not think things that are free are good.
and so they are willing to pay for a better experience it just there's all kinds of psychologic psychology around pricing that proves this out. But people will effectively pay for a better experience. So why is it important? I always think that customers
customers, you keep them on the hook when they have skin in the game, and they're paying for something.
It really does make a difference. I've seen it multiple times. I think the other interesting thing for me is that it's great at keeping your Cfo off of your back because you are paying for your team. You're recouping your costs.
We'll get into in a minute, you know. Where does implementation and onboarding live? Does it live in Cac or cogs? But if you are if you are in cogs, it's really really important for you to be paying for your team.
and if you have a pstn you're golden.
Charlotte.

So just wanted to make a comment, and that your Cfo and your executive team and your investors are gonna probably vote that you have you reduce your
professional services revenue as a percentage of your total revenue as much as possible, so they would probably prefer to be not a a separate charge.
and you know it. It leads to higher valuations, you know, if you, your higher valuation, you have higher valuations for recurring revenue. That's part of your license fee that you pay every year you're you'll be worth more as a company if you if that's included in your yearly fee, so just wanted to.
Charlie, I don't disagree with you that investors and boards don't like Sas companies to be heavy professional services companies right? But there are. They're okay with having some level of
professional services that is making money. Right? It just needs to be the right blend between the software and the services.
And so I think if you were making the distinction between paying for implementation and building a massive professional services team, right words are not going to be excited about massive professional services teams for Sas companies, but I think they are going to be happy to see that you're recouping the costs for your teams with implementation fees.
I'm good. Thanks.
In terms of cons, you know, again, sales leaders may complain about it. You wanna make sure that you're trying to give an incentive to sales teams to be selling your implementation costs. And you always wanna give them some sort of carrot to be able to do that, and you wanna steer clear of giving them. Quote a relief for it. But you definitely wanna make sure that you're incenting them to do it.
I also think it's really important to again kind of to Charlie's Point steer clear of customization because that gets you into heavy professional services. You really should think about packaged offerings. I'm a big fan of packaged offerings.
Let's also talk very quickly about what is Nr. Versus what is one time fees now? Premium support, premium support and manage services are considered an R,
because those are recurring. Rep that's recurring revenue. And you can create all kinds of really cool packages around premium support and manage services, and you can also give an incentive to your Csm's to sell these. This is a great way to do expansion through services.
And it's considered nr, implementation is always considered below the line. It's a one time Fee, because again we talked about the fact that there isn't a defined start and the defined end date. You have to be able to understand your cost, to serve in order to be able to
price your implementation. If you are just starting out with paying for implementation.
You wanna make sure that you have a good negotiation with your Cfo around. Break even versus sure that you're trying to go out the door with a 20 plus margin. It's really hard out of the gate to get
implementation fees going with a sales team. And so you want to make sure that you're at least breaking even in year one.
And whatever you do, try, try try to prevent throwing it in for free as a way to protect your license.
Costs or your license

discounting, it will sometimes happen. But you have to have that negotiation with your sales team.
Alright, here's a couple of examples of what you could do in terms of package offerings. I'm a really big fan of showing this to customers, especially when you think about showing them choice. Right again, that concept of 85% of customers will pay for, you know. They'll pay for a better service level.
This is what you can show your customers, especially when it comes to implementation. These are the different things that you can offer for different price points. Again, it's also the rule of free. Here's what you get for basic.
And then here's what you get for these stepped up implementation options.
Okay.
let's talk very quickly about
where does an implementation or an onboarding team or Cs in general? Where do you sit?
I think my my thinking on this one has changed throughout the years. I was always kind of of the opinion that
you know, sales and marketing is always Cac, and we're cogs right? Because we're a cost. We're a service. We're a cost
and I think in having more discussions and being more responsible as my leadership positions have grown. I think it is actually better to have implementation. And Cs sit in Cac. And the reason I think it's better is because when sales understands
that you are part of the process and a part of their cost to acquire customers. They are very much gonna wanna have you engaged in conversations about how to improve, not just the sales process, but how to improve the post sales process. And I think this ha! This also leads to much better conversations with sales leaders
about. You know the Icp right? If they actually recognize that you're a part of their cost center. Then Icp, that Icp conversation gets a lot easier, because now everybody's in this together.
Okay, questions about that. I know. I covered off on that a little quickly.
questions about where you sit. Cac or cogs.
Would anybody like to ask a question? I do have one in the chat that was just covered about 2 min ago.
Hmm.
Okay, I'll I'll bring this one up from Anna. Does charging for implementation need to be separate charge. Or may it be baked into the product subscription price.
I would argue, and I think the closer you get to going to be a publicly traded company. It is a one time fee.
Excellent. Thank you. Then we are caught up in the chat for now, and we can take some at the end. If we have time.
Great. Let's talk about let's talk about adoption. So I think adoption is one of those
things that everybody knows is important, and we need to do it. It's critical to customers renewing, is it technically part of onboarding? Is it not? Part of onboarding?
My argument is that
again.
onboarding is a program. Right? So it's really about, how is your customer

using your software? How are they leveraging their software? And how are they optimizing your software? So getting them up and running just isn't enough. And I think again, we've seen that from the outputs of 2023, right? I think that
what I find really effective is when you have exited implementation, you're starting to do a lot more training with your customers. That you actually put together an adoption roadmap.
not just an account plan, but an actual roadmap of what are the milestones that a customer should expect to see value coming out of your software and usage from your software and activation from your software. What are those metrics and milestones? And how quickly should your customer be achieving those? Because those are things that you can present back to them, either in an automated Qvr. Or an actual physical Qvr. Or they can be discussion points at 6 months. When you start talking about renewals.
Also, I think, as we talk about Cs
Comp plans.
building adoption metrics into the Csm Comp plans, I think, are really interesting these days, because I think we've seen the output of what happens when our customers are not adopting at the level which we need them to in single year deals
and again, I think.
for adoption. You really want to invest in this level of
Lms and community and in app, because
you are going to ensure that your customers you want to ensure that your customers are continually continually learning about the software right? Because it's going to change. There is going there are going to be additional additional features. They're going to be new things that you that your product team presents. You want to make sure that there's also a way that those users are seeing what's new understanding, what's new and adopting what's new.
and then make sure that your Csm's and that you, as an organization, have
put together that playbook for low adoption
and make sure that you are recognizing it
specifically as quickly as you can after implementation.
All right.
Didn't quite leave as much time for QA. And I know, Dave, I owe you some specifics on the questions that you asked. Anything else anybody wants to get to in terms of things that we didn't cover additional questions concerns, maybe a specific problem that you have within your own organization, as it relates to onboarding and implementation.
Excellent. Thank you. I'd like to open up the floor if anybody would like to come off of mute.
and then we can address a couple of questions that were in the chat.
Okay, well, we just had a great question a moment ago from Andrew. Andrew asks, how fractional do you get with cost allocation. If you have a blended team. Curious what others have done or have been asked to do.
So, Andrew, your cost allocation for a blended team.
What do you mean by blended team? I guess I need a little more definition.
Sure. So when we talk about customer success, we're talking a lot about onboarding and some our revenue here today, we have you know, full lifecycle Cs right where we're looking at late stage adoption. Maybe some custom support stuff or ongoing. And so there is

in both in the Cco school and in other arenas. I'm hearing an Incred, an increasingly like fine line being drawn between back opex. Right? So I'm just curious like, how fine is, are you guys experiencing the line being drawn like
to an fte level? Are you guys looking at trying to estimate, you know, total met like, what it? What? How are these things working for a team that may not be so large that you have a really clear cut dedicated onboarding team versus potentially other later stage adoption and support functions.
I have some thoughts, but happy to to listen to also what the what the crowd has to say. I think that if you are, Andrew, if you're still kind of in the phase where Csms are doing a lot of heavy support functions.
That feels to me like that's a little more cogs than it is.
Cac.
but I I've not usually seen it down to the Fte level, even if it's blended it usually the Cfo will say, and anybody feel free to correct me if I'm wrong. But the Cfo will say, Okay, what's kind of the function? And let's put it with the function as opposed to the individual.
I've always had it like the individual.
What's that, Mike?
I've always had it at the individual.
People get coded to departments and departments do not necessarily equal functions from a P. And L. Perspective.
but it also, it depends on the stage of your company and the sophistication finance function.
Yeah, I've also seen
just taking a team and
looking at, you know, kind of how they spend their time. And then
it's not perfect science, but then roughly allocating that
to cogs versus Cac, and saying, Okay, well, you know, we have a team of people, and there's they're spending some of their time
doing upselling cross cell. But they're also spending some other time doing support
related things. So let's kind of estimate how much time they're spending in each category and allocate that way.
Hi, Charlie! So you have your hand up.
Yeah. Sorry to to be asking so many questions, but I wanted to get to an earlier one. And just curious why, I feel that
Csas and
Nps are somewhat vanity metrics, and I would prefer more of a business impact kind of value. Realization. Metric wanted to just get your thoughts Ally and anyone else's who really think that, hey? This is why Nps is so critical, or Csat? I remember Meg.
was it Meg Whitman? I don't know 15 years ago was all about Nps. But and I didn't believe it then, and I'm still just a bit skeptical now, so just curious to hear anyone's thoughts
and educate me.
Is it a vanity? Metric? Yeah, I definitely think it's a vanity metric. But
that
just like Mql's can be considered vanity network metrics. But I I do.

just because it does land there. Charlie doesn't make it, I think, less important to track. I think it's a matter of what you do with it now, do I think you should? Comp. Csms on Nps. No, I don't think you should. Comp. Csms on Nps, but I definitely think it's a metric that's important, and I think it's a metric. You should be tracking.
Good. Thank you.
Open to the controversy on this one, though.
Just to chime in. I I would agree, Charlie. I think
you know customer value in my mind is the Holy Grail of metrics. Right at the end of the day. That's that's the most important thing by far. And I've always tried to get as close as possible to to measuring that and basic decisions off of that.
You know, in terms of metrics during onboarding right? That you're not gonna have that then. So maybe maybe you need to lean on Csat or other things. But
I've always tried to.
And if we're gonna if you're gonna you know, you can't measure value right then maybe there's questions you can ask when you survey the customer post onboarding
that are more about the value they're getting right that are very specifically tied to that as opposed to you know. How likely do you recommend, or how much do you like the product, or whatever you know, more sort of like tactical types of questions you could ask right to me
at the end of the day. The better picture you have of what value the customer is getting is, you know the better off you're going to be, and knowing where the risks are.
Good. Thank you.
Does anyone else have a question comment. We have a couple of minutes left, so please feel free.
Well, we can go back. There was. This was a little while ago, and I just wanna address this one question that Zack brought up
about earlier in the session recommendations for status, report tools, or companies who have provided great experiences as an example.
There are all kinds of tools out there. Monday.com. I know smart sheet will do a pretty decent status report.
you know, certain Csps will do a decent status report for you. In an automated play.
I think also
do going simple and having a template is is fine, too. If the implementation manager doesn't have, you know, a hundred implementations that are attached to them. If it's again, if it's more of a tech touch play, you can go with something like monday.com. And I think Hive actually might have a status report these days, too, and maybe Rocket Lane. Does anybody know.
Yes, and someone in the chat also recommended teamwork.
Hmm! Yep.
that's a good one.
Thanks, Patty.
Excellent! Well, everyone. Thank you very much, Allie. I'll pass it to you if you have any closing comments before we wrap up.
No, I just wanna say thank you very much. I really enjoyed it. I hope this was beneficial. Again tried to cover as much of the one on one, and potentially, you know, not quite 201, but tried to

give you a realm of different things to talk about and think about when you're talking about onboarding and hopefully, you all
feel strongly as I do about the difference between onboarding and implementation. If I can be of assistance, or answer any questions you can reach out to me. On my linkedin profile
and happy to chat.
and if any of you want to stay around. I have a couple of extra minutes happy to talk through individual scenarios.
That's wonderful. Thank you for the offer for those of you that are gonna jump. Thank you so much for being here for week 3. It has been a pleasure to be with you. Please feel free to reach out to me on slack. If you have any questions related to Pavilion or this class. Specifically otherwise, I did share the feedback link in the chat. So share your thoughts with us. I also shared Ali's Linkedin, so I know she'll be looking out for any messages or requests. Thank you all for being here. Take care and enjoy the rest of your week, and we will stay on for anybody that would like to chat
for those of you that are leaving. Goodbye. Thank you. So.
Hi! Everybody! Thank you.
Thank you.
I stayed on cause. I have another question.
Love it, Katie, let's do it.
Yeah. So your time. The timing for this couldn't be better. We just launched a new product. We're completely rethinking the onboarding and implementation motion. We sell into the construction industry. Software that's used on a per project basis. So it'd be used to build a skyscraper or a bridge or a tunnel. Our technology has very little
configuration required, and quite a bit of education and training required. And so I'm thinking about it much more at that onboarding programmatic level. There's not a lot of implementation as it's traditionally defined in Sas
and I'm wondering how you would think about go live metrics. When it's really more of like, once they start using it on a project, they're gonna be using it for hopefully, months or years.
it's hard. I'm having a hard time defining that go live motion when the goal for me of onboarding is
training and and getting the team ready and prepared.
okay? So once it's, it's up and running right effectively like that doesn't take very long. It's it's more about how you're getting those users into the system and getting them comfortable, building those individual projects.
Yeah, the the training and education piece could be really complex. Right? We're trying to pull that off and say what it's the basic you need to know. It's not overwhelm you, but getting them to understand those applications and used cases. So whether that's running a mock project or you know I don't want to go too, Dorky, into the learning.
Yeah, that's okay.
Pass your readiness, test right, making sure.
Really! On.
Those concepts. But it's just harder to draw that line.
Well, do you think like, if you were able to do something related to? Okay, if they were able to build 2 or 3 projects

on their own that they could almost be like certified. And that's the that's the finish point for them.
Or is it one individual? I'm thinking. I immediately kind of went to certification, because certification feels like that would be a really good way for you to say, Okay, now I know this person has been on boarded because they've been, you know.
and again certified as a very light term. You can make certification into something crazy, Wacko, or you can make it relatively simple to say, Okay, we we know, because they're able to do A, BCD, and E steps that they can be, you know, certified. They're introductory, certified. Whatever you want to do from a nomenclature perspective.
Yeah, this is great. This is
validating. One of my guts is, it's not about. If so, for example, in the past I was in Hr technology and the Go live was when the career site is live on their website. And that's really the new front door for the candidates to come. There's no such thing as that is like really a technological switch to flip. So I think you're right. It's gotta be, you know. Certification is a nice way to formalize
measuring their readiness to utilize the software on real world application. So this was great.
Yep, and invest in an Lms. If you haven't already. There's also all kinds of certification tools. That will give them little certificates that they can put on linkedin and I don't mean that in a disparaging way. People love those certificates. But there's a way to automate that that makes it really easy
that, you know, sends them over their certification. They can post it directly.
Amazing. Thank you.
Yeah.
Oh.
Andrew, you stayed on. Is there a question that you had.
No, I was just soaking a little more knowledge, that's all.
Oh, cool!
Yep.
Yeah, Ally, this was such a good session. I really.
Labor.
The thought that you put into it. I've written like 3 pages of notes, and like really high quality. So thank you.
Oh, well, thank you, Katie.
Alright! Have a great day, everyone.
Alright, bye, bye.
See you bye.
Any other questions I can answer for people.
And I'm really sorry about the Internet connection, Alison, I don't know what happened is, I mean. It's Murphy's law, right? It like was.
Right.
Fine all day, and then, when I have to teach a class.
It happens, it happens that's something that's completely out of our control. And you rebounded perfectly. It worked well right after that last lit. So please. No apology necessary.
Anyone. This was fantastic for the.

That was awesome, really great.
Oh, thanks!
It was there was. It was perfect. Right great, great discussion. I definitely wanna make sure that we're getting the
the chats so I can just like review them and see like, you know.
where do people want to dive deeper and that kind of thing? But it's awesome.
Exactly. Yeah, yeah.
as much as you can get them talking. I think is is the best. Right? So I tried to stop for as many questions as possible. That's what I think is interesting more than
slides.
Awesome. Alright, thanks. Guys.
Oh!
Aye.
If you want the Transcript separately, you can message me on slack, and I could probably send you a download if you wanted to go back through the chat.
Oh, yeah, I was gonna ask for the transcript for all of them, actually, for all the classes.
I mean less than slack. No problem. We take care of that.
Alright, thanks, bye.
Hi, and thank you, Ally, for being here with such a pleasure to meet you. I hope to see you again in another class soon.
Alright, thanks, Alison!
Thanks. Adam.
Hi Daniel.
Alright, bye.
Take care!

Class 4
text
Hello, Hello, everyone! Welcome
another Tuesday. I cannot believe it's been a week since we were together last time.
Hi, everyone!
I'll give you a moment to get connected to audio. Get comfortable.
Welcome back
we are in week 4 of CO. School. My name is Allison. I will be your host today, happy to help in any way that I can.
Wonderful to see your familiar faces today
as always. If you are in a place where you're able please feel free to turn your cameras on. We'd love to see you today, and of course we'd love to hear from you. We love your engagement, your questions and comments want to get the most out of this class, so please feel free to chime in. I will be monitoring the chat. If you have any questions, we will address them throughout the class. We will pause for questions, so if you would have like to, you can also raise your zoom hand, if you'd prefer to come off mute and have a conversation directly.
All right, welcome, everyone. Welcome back to week 4. I am thrilled to introduce Mike Lamir
Mike is the vp of customer. Success at Overjet, and Mike will lead us in a deep dive on Csms.

And account management. So without further ado, Mike, I will pass it over to you. Thank you so much for being here with us today.

Thank you, Allison. Good afternoon, everybody. Great to meet you. We will dive right in, and I'll give you a little bit of an intro. But before I talk about myself, I'd love to hear a little bit from you all today, so I'll be asking as we go through today's session to drop some of your thoughts in the chat.

So just to get to know everyone and to give us a sense of of specialties I'd love for if you wouldn't mind to drop into the chat how long you've been working in in post sales and sort of the customer success realm. Or if you were making a jump, maybe from a revenue team over to customer, success would love to see that. Do you have a specialty? Are you focused on customer success management support onboarding sort of what is your specialization within post sales?

One thing I'd I'd wanna make sure is that we're addressing all of the topics you hope to learn about today. So what's one question you hope we answer today.

and then number 4 optional. If this will make sense on my next slide is, what's the first CD you ever bought? That's my favorite icebreaker, and unfortunately, my opportunity to use it is, is sort of dwindling. I've been having too many icebreaker sessions where people have not purchased Cds ever in their life, so they don't have the first one my other favorite one used to be. What's was your first Aol screen name, but that is also become obsolete, and I can't use that with folks anymore

if you wouldn't mind dropping in the chat? Some of these questions that would be great.

So give a little bit of my background here. As to who I am, and how I got here, and and and had the the honor of of talking about customer success with you all here. Today I started my career actually in the music industry. At Blue note records and to age myself a little bit while I was there. We had a hot new artist, we thought was really gonna make it and that was Nora Jones, so many years ago we worked with Nora Jones at Blue note records, and from there

I found myself into the world of digital advertising. And so I had my first account management job at Yahoo. Running ad campaigns

for for them and then there was a brand new startup in town. Just really, I thought was gonna make it called Hubspot. And I. I grew up professionally there, coming in as a Csm and eventually launching and running the professional services team there. So I learned a lot about sas great customer success fundamentals a as well as launching new programming professional services through Hubspot.

After that I assumed all early stage startups would be like hubspot. So I jumped to another early stage in Boston called Notarize, where we did online notarization softwares working primarily with within the real estate industry. I was the first Cs hire there. So I turned on salesforce. I turned on our billing infrastructure.

built the team from from Scratch, which was a great experience. Spent about 2 years there before going over to toast.

Where I joined our Dean Emmanuel Scala, to run the customer success management team at toast, going from 10,000 restaurants to over 100,000 restaurants. Series C to post Ipo there. Learned a lot toast is a really incredible opportunity. Because of the software it was Fintech. It was hardware, and left there last summer and joined

another startup called Overjet, which is dental AI series c here, and and one of the the reasons. I show all these Logos, and and my background is I've led Cs with a lot of different customer types. Notarized was A, B 2 B to C. Hubspot and toes to B 2 B overjet B, 2 B as well dentists to restaurant owners, to marketers, to title agents.
and everything in between
And so you know, as a point of introduction here, I'll share this as well that QR. Code will bring you direct to my Linkedin page. Here's my personal email address, as we go through everything today, I would love to to stay in touch with you all. And I am. We'll try to answer as many questions as we can. But if any questions come up that I can't get to today.
please shoot me an email. I'd I'd love to grab 30 min leadership sounding board sessions with Cs leaders across the industry or coffee in in Boston. As I mentioned my love of music. If you were to send me a random spotify link every once in a while on Linkedin, I wouldn't be disappointed in that as well.
So, customer success management. As you look at the curriculum and the for this entire program, and I talked about it with Emmanuel.
I I think customer success management is the discipline that probably most of you have already led or worked really closely with. And so with today's session won't be, is a customer success management. One on one. This is not gonna go through the fundamentals of of you know how to build a customer success team or how to run a customer success team. But instead, I'm gonna deep dive into a couple of more controversial areas, talk through some challenges that faced and how I've overcome them and go through some examples of them. We'll also be asking some questions of you all in the chat. So please be ready to share your experiences. Especially disagreements, you know. I think a lot of the the questions I'll be asking here is, do you agree or disagree with the way that I executed this? Why or why not? I think this is a good session to learn, not only for me, but also from one another.
And the the big thing here, as we talk about customer success management is depending on the and as I showed it, sort of my background, depending on the customer base, you're working with maturity stage of your company. There is no right way to run a customer success management team. Every company I've been at has been a little bit different, and I'm sure all of you run your teams a little bit differently. So the expectation here isn't that you follow everything that I say, but
really, to just spark some new ideas. It is, after all. Q, 2. Okay. Season. So hopefully, this can spark some. Okay, our ideas forward for you all.
So the agenda we're gonna talk a little bit about what is customer success? Just make sure we all have sort of a shared foundation, and why it exists.
We'll then talk about some fundamentals of building measuring and goaling a Csm team. We'll talk about one of the sticky areas of of handoffs and some of the challenges that exist between customer success and hands off. I think the the most interesting part of customer success right now, and the topic that I spend most of the time in the industry chatting about with folks is scalable
customer success management. So as we go through there, I'll give you all a checklist of things to think about when launching or or optimizing your scalable customer success management program, as well as some tool recommendations of products I've I've used in the past, and that I like so that you have sort of a tangible component there.

And then share some tips and tricks of that I've seen from chief customer officers that I've worked with and sort of have respected the way that they've they've operated, and then we'll open it up for some QA. As I also mentioned. If you do have questions, feel free to raise your hand, drop them in the chat. And if we can sort of pause, I'd love to get into. Make this as conversational as we can, just taking a look at some of these Cds. Here we've got. Oh, now, that's what I call music. 24. We've got Nirvana Hoodie and the Blowfish
green day.
So I'll share mine as we kick off here. Mine was ace of base and voice to men. I got him on the same day very exciting day for me.
So what is customer success? And why does exist? Why, why does the chief customer officer role exist? Why does customer success management exist? And so I've got some stats here. These are sort of for anyone who's sort of moving into customer success for the first time in the career. These are the often cited reasons why, you see, customer success management existing. So we've got, you know.
it's off. It's more expensive to bring on a net new customer than to retain one. And I cite the the Harvard Business Review study that found that 80% of customers saying their experience and a company pro it provides is as important as the product itself. I think this is true, you know the early days of Hubspot, customers stuck with us because they really like talking to hubspotters. The product was not great
in the early days. Referral and advocacy. This is a huge part of our experience at toast. About 25% of our net. New leads came from Referral. So the customer success management team really building up the confidence and the happiness of these customers so that we could make that flywheel work was really important. And then, obviously, reduction of churn. It's the name of the game. It's why we're all here.
A couple of quotes I wanted to share with you on sort of what is customer success. And this is by Tomas at at Red Point ventures and talks about here, maximizing the lifetime value on their customers. That's true, that's accurate. And this is often cited as the focus for customer success. But I I prefer this quote from Lincoln Murphy, from 16 ventures.
Lincoln has a great blog. If you're looking for for Csm leaders in the space I really like. Lincoln's writing here. And one of the things he calls out is, it's not just about reactively solving their problems, which is so often sort of the role that Csms play. They just stick in this reactive nature. But it's about making sure they get the most value out of your product. And I wanted to highlight this for future
Ccos to making sure that their Csm's are always thinking about driving value and not just being a goalie or a churn protector.
So with that in mind that North Star in mind of driving value. Let's talk a little bit about some of the
metrics and ways to measure a customer success team and how to build a customer success team. So this was a question that came through before. The class started, which was, you know, what are some fundamental elements that makes for a good. Csm, sure a lot of you have hired this before. So I'll I'm gonna raise a few bullets that I look for. That may be outside sort of the traditional areas you focus on. And why? I think they're important.
So first is strong and flexible communication skills. Obviously, we wanna find strong communicators. I highlight flexibility here because for me you know, I've had Csms, and I think

we all do who have a range of customers that they're working with. They might have to walk, talk to the Cfo as well as the end user. Who may not be as understanding of of the Roi calculation of your product. So I look for Csms who have
flexible communication skills and we'll push them to to see that in a case study presentation as we're going through the interview process. Can teach and coach at different skill levels. So this is another case. Study example, I'll say, you know. Teach me something, whether it's your own product. That you're coming from, or or something that you're passionate about, and teach me as if I was an expert, and teach me as if I were a beginner, and see how flexible they can be. With that concept
persuasive. So oftentimes csms are are owning an upsell or renewal commitment. So we do want a sense of that ability to close for dollars. But I also look to see if they can get commitment of time. So if we're asking the customer to get the maximum value out of the product, the ability to persuade a customer to change their behavior and commit time to use the product differently is really important as well. And I think that's often missed when we think about a Csm's ability to close
obviously having an organization. Methodology is important. Here. You want someone who's organized. They work with a sense of urgency and ability to prioritize. So one tactic that I use around prioritization and organization methodology within a case study is to give them a fake. Crm, so I might give them a list of 20 accounts with their customer health score, their AR, their renewal date.
their number of recent support tickets, and I'll sort of make it up with no clear sense of prioritization. I'll then ask them, how would you go about prioritizing? All of these customers? Have a a red, alert flagged. Who would you reach out to first, second, and third. And why did you make that decision? So I wanna understand the way that they would go about optimizing and prioritizing that customer list
and then empathetic to the needs of the customer. So this is sort of a a methodology that I use in in trying to understand what motivates people. And when I think back at the best Csms that I've led and worked with they care about their customers with sort of a use the term a mix of wallet and heart. So they're doing what they need to do to hit their goals and get their variable Comp. And they're sort of motivated by that but they also
care about what's going on with the customer. They think about them more than just an account they get to know them. As people. So I think this mix of wallet and heart is something that I found valuable. And hopefully these are tips a little outside the norm of when you think about building a Csm team.
If you're coming into a new organization and thinking about, where should I start to plant seeds? Or where should I look for the Csms up next in my organization? Who who will be on my team in 2025. The areas that I look for are Bdrs coming from the sales team. These folks are on the phone all the time. What I love about them is they're quick to hop on the phone right? And it makes me feel a little bit old.
But I'm sort of the the guy who's saying, You know, stop just emailing the customer. Get on the phone, get the issue. Resolved.
People who come to our organization from Bdr land are great at that project managers. They tend to be really organized and can communicate quite well with customers. And then the senior customer support reps.

guys, you usually see 2 paths for support reps, either going into engineering or coming into customer success management. And I I really love that for them. I will call out, there may be a challenge with bringing customer support reps over which we'll talk about in a few slides.
As we talked about sort of the the North Star, and some of the the reasons why customer success exists. We call that right off the top reducing customer churn and achieving customer outcomes. And that second one is is so important to me, and we'll continue to talk about sort of making sure we're achieving customer outcomes. If that's our focus, then that makes reducing customer churn a lot easier.
this data comes from the most recent survey that gain site produced last year. So I think, and a resource. I'm sure most of you are familiar with gain site, but if not, they produce a lot of great content just to keep you informed on sort of trends within the customer. Success industry as well.
so breaking it down from the north, start to some of the goals. What are the Kpis for Csm teams other than churn. Right? Churn is our. It's if you have a an A company wide. Okay set, and then you're breaking it down. Most likely the churn number is gonna be you're okay, or if you're leading a Csm team
at the top here, there's no right or wrong way to build a dashboard. There's a lot of different softwares you can use to create dashboarding, whether it just be salesforce, look or gain site, churn 0 to tango you can build them in a lot of different ways. But here are some of the metrics that I see as most valuable for Cs leaders.
net revenue retention, which is a breakout of upsells, expansions, and down sales insuren renewal rate. I wanna spend a little bit of time on these next 2 feature activation and adoption. I'll share the vocabulary. And why I break that out. Personally as important, you can agree or disagree or just sort of use this as a a
a seed to clarify vocabulary in your own organization. But for for me, what I've used is activation as a binary concept
has the customer proven that they can use the product one time. And so for us at toast, I think a a product that hopefully, most people are familiar with is online ordering. As the customer processed 5 transactions through the online ordering platform.
We went to 5 because we saw there was usually 1, 2, or 3 restaurant owners would put in their own. It's not really showing that they've know how to use it with their customers. So once they hit 5 that was considered activated. Once you're activated, you can't become unactivated.
Adoption is a rolling measurement. And so this measures your usage month over month, and so we would have expectations and thresh thresholds of usage that would give us a sense of red, yellow, or green for adoption. And so I think, separating that concept of activation and adoption is really valuable and important. If you haven't already done so.
Just to touch on activation as well.
it it. Another debate we had regularly was who owns activation, especially if you have a multi featured product. And I think it's best case scenario for onboarding to own activation in most organizations. But it's possible that activation
doesn't catch for every customer, and they need to graduate. And you need to get more customers through to bring them live. So there tends to meet. From my experience there tends to always be a sense of sort of cleanup activation for Csms

additional kpis to focus on for Csms referrals generated. Has been a great focus for ours for us. And it's, you know, not just.
It's to take advantage of the Nps surveys that come back as promoters. And to do something with that. So so often, we just focus on the detractors.
Increased customer roi. So at over jet, we have the ability to see
how much our product is impacting their revenue. And so I can actually goal my team on, how much are they driving value for their customer in a measurable way? Not all products have the ability to do that. But if you can, it's fantastic Customer House score. We'll talk about a little bit on the next slide
at risk percentage. And then Csat, the one note I wanted to give on Csat is that I try not to put too much weight into it. I found you know what is the relationship? What is the temperature you have with your customers? Is
oftentimes we'll see a happy customer. There's happy, they love us, they they love talking to us, they get on every call, and then they turn so happy. Customer doesn't necessarily mean a renewing customer. So I just wanted to give that caveat note on Csat.
I talked about customer health score.
obviously, this is a huge, a hugely important
tool to use for a customer success management team if you haven't launched one yet. I wanted to give some some tips to think about when launching a Customer House score, as these are usually the main blockers I hear from from folks. Is there
trying to launch something and having a hard time? So first and foremost, I'll start simple. It's really easy to get lost in all of the formulas that you wanna create when launching a Customer house score. If you start really simple, just using the the data points that you have and building a V one up there just to get it launched and see how well it works.
That's all you need to do. Start simple and and optimize from there.
Don't let imperfect data be the reason whether you're not able to move forward with a Customer house score. I bet if we were to have a one on one conversation with almost everyone on this group, and I were to ask you about your data.
Probably 95% of you would be dissatisfied with the
quality of the data within your organization, that is, can be a blocker for some people, but I would encourage you to not let that be. Just start with your imperfect data. Use that to just get the the train off the tracks.
Similarly, you don't have to wait for the perfect Cs platform. I I think there's a lot more value in building a customer house score to validate how you're gonna use it before you go by a game site. Then to expect gain site to be the deliver of the value of a Customer House score. So I'd encourage you to test it out, just using Google sheets
and then quickly align your health scores with specific actions for your team and be really prescriptive. This is a mistake that I made at toast, where I sort of delivered access to all the data to my team. I gave them all the scoring I showed them how customers were performing in all of the different products that they could have access to, and the team had no idea what good looked like. So alright. This customer score on this product is a 60.
Is that good? Should I? Should I reach out to them? Should I not
and then be really clear? So when they need to take action, what are the thresholds for action? And what are the actions you expect from them? We had a diversity of action. Some people

were reaching out. Some people weren't. Some people were creating videos. And so what you wanna do is pretty quickly identify what the score levels are to take action and be prescriptive on what action you expect them to take
and then make sure you're measuring the impact experiment. Training things. We'll talk a little bit about experimentation in a few slides as well.
So we talked a lot about Kpis there. We talked about Customer House score. I think this is a good opportunity to sort of resend in the chat. Thank you so much for for adding in the chat here as well seen some Youtube as well. Some love for the Bdrs in there. Some
appreciation for the mix of wall. So thank you for that. But I'd love if there are other kpis. I didn't mention that you'd like to talk a little bit about please feel free to drop that in the the chat. There's one in particular I didn't mention on that slide. And we'll talk about that in a few slides as well.
But please drop your thoughts in the chat.
The next thing I wanted to talk about is, once we've got our Kpis organized, and we know the metrics. We're gonna use to run our customer success management team is how to organize them, not only for presentation internally, but also for program optimization. And so this is a structure that that I've used in the past because within customer success there are so many different
challenges that you're solving you're working with at risk. You're working on upsells. You're working on referrals, and it can be tricky to tell a clean narrative about the work that your team is doing. And so I've sort of borrowed this methodology from our friends and sales leadership to tell a cleaner story about what we're doing within the customer journey, and then similarly identifying some of those sub metrics within each of these categories
to communicate how we're optimizing customers moving through this process. So this framework, I think, is really helpful. Your mileage may vary in terms of what the funnel stages are right. You might not separate, activated, and adopted, you might you up, sold and expanded above renewed but something similar to this, I think, is really valuable, and to double click
into how we articulate some of the sub metrics here and what we then use to optimize. I'll go into what I've used in the past here. So from an onboarded standpoint, some of the sub metrics will look at is, how long did it take to to kick off or to graduate?
What's the time spent post graduation by the onboard? And in some organizations the Csm. Handles onboarding some of them. You have a bespoke onboarding team, so if they are going through the graduation phase, what is the time spent? Post graduation, which is obviously something we wanna diminish?
We'll take a look at the support tickets in the first 30 days. Post onboarding to sort of understand how well the Csm. Or the onboard, or answer the needs of the customer to get them sort of self sustained and and using the product on a regular basis. And then what's the number of onboarding calls per week? Are we sort of maximizing their efforts within onboarding, and if any of these are under expected, Sla's either for the team or for an individual, it gives us the area to optimize the same way that you, a marketer, might say in terms of you know, what's our demo to close rate? Or what's our our lead to demo rate
clicking into activation. So we'll look at activation percentage per feature by 90 days, 30 days. And what's the average time to activate either by product or by segment

from an adopted standpoint. What's the percentage of products above adoption goals? So if we had that rolling 90 days threshold that the customer is using this. So 5% of every login they have. Then are we hitting those expectations for a Csm or for a product overall. And then if this is a concept you have of specific adoption meetings. If customers are falling under those expected thresholds.
what are you doing in terms of running those adoption meetings? And is your your customer success manager, or your team living up to the expectations there?
Also that expanded. So I I'll usually use the vehicle of Qbrs, which I usually rebrand to strategic business reviews as some customers. It's can be tricky to get on that commitment level, depending on what segment you are on for quarterly business reviews. So I've we use strategic business reviews. But how many have been delivered to to drive those renewals. What's the close rate? How many meetings are you taking to close on a renewal? What's the average increase on year over year contracts and the average increase to contract length. For those renewal conversations
around upsell and expanded. What's the number of open Ops? Someone is carrying oftentimes with upsells. I'll see that no one's really using the opportunity until they've closed it with a customer. So we really can't get the pipeline there. So I'll work with the team to make sure they're opening opportunities earlier in the process
the percent of opportunities by lead source. So what I'm looking for here is, are they relying only on customer marketing to generate leads for them, or they'd be taking on the initiative to generate opportunities themselves? Are they partnering with sales to generate opportunities? What's the number of activities per OP. And what's the OP. Win rate? And then, lastly, the promoter stage. I feel like this is an area that's often forgotten about, but sort of taking those happy customers in in converting them into promoters of the business. One of the things we'll like to do is is what's the number of delight actions per quarter by Csms. And encourage Csms to take care of their really happy customers. So this might be hey? This customer was performing really well. We had a a
I I remember I worked with a batting cage in Toronto when I was at Hubspot, and they they were using that to generate new leads, and they had broken a threshold. I think they had generated 10,000 leads. It was the first time as an organization. They've broken 10,000 leads. And so for this I had CEO of Hubspot sign a baseball form. We put it in the mail and sent it over to them with 2 of the the Hubspot books.
basically free for us to do that but it. It really showed the customer that we cared about their business, and it delighted them. Turn them into a promoter and a referral source for us. Number of case studies generated. So I like to feed back the go to market motion. How can we take these promoters and and even give a goal to my team at times. Of how many case studies from your happy customers are you generating?
And then ultimately, if you have a referral process. What's the number of referrals generated? So once we have some of those micro elements to focus on and to optimize within the team. I wanted to talk about how that translates to variable comp for csm, so
first for me, the range of variable comp that I've seen before is anywhere between 10 and 20% of their base salary. And I'll typically use one of these 2 structures for variable compensation with the team first is really simple right? Like, what is your goal for net revenue retention? Or you can turn no more

than 16 accounts per quarter.
But if we wanted to get a little bit more advanced and focus on driving some of the behavior and some of those sub micro elements we talked about on the last slide. I might break these out. And here's some of the logic that I've used to break these out
before as well. So 50% churn and downsell AR broken out from upsell opportunities. So I I tend to like to separate churn and downsell from upsell because I don't love being able to upsell your way or renew your way out of a a churn problem. I like to see exactly how much revenue is going out, and how much revenue is going in, and put it a increased emphasis on protecting that revenue.
If we are focusing on upsell opportunities. I always like to give a minimum number of opportunities closed. Within a quarter
the next, we've got 10% of 10% would make up your variable conflict with at least 75% of customers at adoption goals. So if we have those, so those minimum expected benchmarks for adoption which would obviously be a sort of leading
indicator of churn if they're slipping under those adoption goals, making sure they're focusing on the full customer how
in organizations where we're launching. We're trying to relaunch a motion of Qbrs sort of giving the team a goal of X Qbrs completed. And then, as I called out earlier, sort of case study generations, and using this as a chance to drive those case studies.
let me take a break here as we go into sort of the next prompt we have to drop into the chat, or what are some other compensation goals that have been impactful for your teams. You know, those are some examples that I've used. But again, we've got a lot of great experts on the call as well wanted to to drop in, and I'll use this as a chance to take a look at some of the questions that have come through. So.
but.
About that my camera turned off, but I'm I'm was trying to get it back on. Very strange that that just happened. But yes, thank you for bringing up the questions, Mike. We did have a couple of great questions specifically from Rob. Rob asked, where does help score fall into the funnel, or is it? Excuse me not reported in your kpi.
Yeah, it's a great, it's a great question, Rob, and so customer health score. You know this just as a reminder. This is where we were talking about with the customer health scores. And so customer health score for me would probably replace this adopted section here, where, if you're focusing on cause. Usually customer health score is made up primarily of the way the customer is using the product.
We'll infuse it, maybe with a Nps score and a team temperature, but most of mine have been driven by the actual usage. So customer health score would probably replace adoption here, especially if you sort of separate activation. To the onboarding team.
Let's take a look. What other questions? Yeah.
Excellent. Yeah. We also had a question from Veronica. Veronica asked, did you align that goal on referrals to Comp.
Yeah, Veronica, if if you don't mind coming off, mute would love to just better understand the question.
Yeah, yeah, I mean, I I think you kinda answered it. You showed on one of the slides that you had case studies tied to their Comp. I think a lot about building the culture of hey? We should

make great champions out of our customers, and that should be like more natural referral motion for marketing and sales, so, rather than having it be tied to Comp. Just have it be like part of more like the DNA of the how we work with customers.
So just curious, like, you know, specifically on the referral front cases, kind of similar. But if you had success with tying that to Comp, or if you just kind of had it as a organization, wide poll.
Yeah. So I, I have had success tying referrals back to Comp, it's a little bit cleaner. Because we've we have sort of referral software within the organization. Where
how many of your customers submitted a referral? It's really easy. It's really trackable. Case. Studies can be get a little bit trickier because they're somewhat dependent usually on the marketing team to produce that case study. And I don't like to comp anyone on something that where they're reliant on someone else to like, bring it across the finish line.
So what we've done is, have you
submitted to customers, to the marketing team who are case study ready and sort of a good case study story behind them. Obviously, we need alignment with the customer marketing team and make sure this fits their need that they don't need case studies. Then it's sort of a wasted effort.
well, we've also done some like small funnels there smaller funnels just within the case studies of do you have a customer who's willing to share a quote with a website, someone who's willing to be featured in a written case study. And then ultimately, someone who's really to be featured on a video case study. So we'll also sort of give some sub goals there within the organization.
Got it. Okay, perfect. That's super helpful. Thank you.
Any other questions here? Alison?
We are caught up in the chat for the moment on this topic. If anybody has something that came through, or you'd like to come off of mute. Please feel free. We can take another minute with a couple of questions.
There is.
I'm just. I'm I'm curious to get your
thoughts on individual versus team goals.
Yeah, it's a great question. Zack.
yeah, do you do? You have sort of a I can give you sort of my overall perspective. Do you have a specific sort of challenge you're working on to that, or you just want to go high level.
I guess. Just curious to get your opinions like I've always been of the thought that
you know, you know, I signed my Csm, the team goal, basically. So everyone's kind of pulling in the same direction. There's less squabbling over who gets what risky accounts, you know. I might give my best. Csm, the risk is accounts for the ones with the most upsell potential
But that way everyone's kind of pulling in the same direction.
Yeah, yeah.
He's on it.
Typically, I err on the side of of giving individual goals as much as I can where I have given team goals, though, are.
if the goal target we have within a certain segment is so small it can be hard to parse out. So if you know W, you're working with an enterprise team. We've got 4 Logos, 2 Csms, and our goal is what we can no more than one logo this year. It's hard to give an individual to break that out and say, well, you could have half a logo churn.

So that's one instance. Or if I've got a developing or sort of an immature team that's sort of growing together. I'm introducing a new goal for for them. I might make it a team goal, because. typically, as I'm launching a new concept. So maybe it's Qbrs, right? Like, hey? As a team, we wanna launch 7 Qbrs. No one's ever done it before. There's gonna need to be a lot of collaboration like, Hey, James's template is awesome. Mimi, your template is great here. Can you guys share that with Lisa? To make sure she's got what she needs for this Qbr coming up. So if there is that shared approach.
something like a downsell goal, though, can be really tricky. If you've got one Csm, that's sort of a leaky bucket and another. Not so. I err on the side of individual goals and then using group goals. Would I be the required to? Or because there's sort of a strategic benefit from grouping the team together?
The one we'll we'll keep rolling here. We'll come back and thank you so much for all the engagement in the this chat in the chat, guys, this is fantastic.
Keep it going. The one thing I wanted to raise the metric that I said was not on my Kpi slide, and this is a bit of my my controversial stance. So get ready for a hot take is who owns Nps and and I'd argue here at the bottom, you can see my perspective is Nps is a company wide metric, not a Cs metric I know not. Everyone feels the same way. If you disagree, please share why in the chat.
But I think oftentimes sort of it's bundled into a Cs responsibility because Csm's are responding to Nps, and I do think it is appropriate for us to communicate with customers who are detractors or recognize promoters as being promoters. But that's different than being responsible or correcting it.
you know, if you look at the traditional language of Nps. I don't think that it asks about the experience with your Csm. Usually acts, asks about your experience with the product. So I. If I were to put it on someone, I view Nps as a product metric.
But we should use it as an input.
I also encourage. You know, if when I see Ccs teams working on Nps, they almost go. Laser focused on the detractors and detractors only, which you absolutely shouldn't ignore, but making sure you're utilizing your promoters to develop those referrals or references or case studies.
and also don't ignore the neutral it can oftentimes be easier to move 8 or a 7 to a 9 or 10 than it is to move a a
2 up to a 7. So make sure you're you're focusing on your neutrals because they can be sometimes easier to move. And then if your if your product team or your go to market team is putting the responsibility on Nps of your your Cs organization. Make sure you're presenting back the themes of the responses from your customers in them.
one sort of hack that I've used to just take all the raw content responses, dump it into chat. Gpt! What are the 5 takeaways here for a product team. What are the 5 takeaways for a sales team? It's crazy how quickly you can get sort of a report back out to your partners there. So that's my hot take it. Looks like
I have a lot of people who sort of agree with me in terms of Nps is not a Cs metric which is great. To hear a lot of you agree.
So that's our our section on building a Cs team hiring some of the metrics you use how to goal, how to set variable con goals shifting over to some of the the Nps or the handoff challenges

here. So I'm I'm gonna focus on one specific handoff today. Because I think some of these were addressed earlier, where I usually see the the wrinkles for handoffs or sales onboarding on boarders to the Csm. Team, and then sort of the the one that is most pervasive, and that lasts. The longest is the transition of of customers between the Csm team and the support team when issues come up and it's usually around who's going to handle this. And what does that look like?

So here, I've got some recommendations on a decision tree, and I'll give an example of a decision tree that I've used in the past, because that's typically the asset that I'll use to drive clarity on who works with this customer when and when is it handed back. And so I've got. I broke this decision tree out and some of the decisions you can make between smaller organizations and larger organizations. And again. These are just thought starters for you as you hopefully, if you don't have a decision tree, this might be something you you put on your okay for Q, 2. So for smaller organizations we'll look for is, can this be solved on a single call? In that case it's 9 times out of 10. It's gonna go to support. If it's just a simple cause, we try and keep them sort of at velocity.

Is there existing help documentation on this issue that to me is a classic case to to go to support. We see it as a repeatable answer. And so we wanna pass that over.

Does it require technical knowledge? Obviously, we would rely on support for technical knowledge.

could this issue possibly impact negatively or positively revenue? Right? Is there a question about an upsell product. Hey, how do? What does this product look like? We wanna get that out of support and over the Csm. As fast as we can to own that upsell. And is there a training need on this product? That is most likely. Indicator that a Csm should get involved, not only to coach them and drive up adoption, but that might be an indicator that they need some additional help. As an organization. If we have a larger organization. And for me, that means sort of you've got a segmented support group. Maybe you have technical account management.

That decision tree becomes a little bit more more complex. So here is this customer, a vip or an enterprise customer. In which case you might want them jumping tier one altogether, going directly to tier 2 or tier, 3 within support. Does this issue requirement element of project management? So is this going to be a 2, 3 week long challenge that we need to unwind and work cross functionally on in which case I would encourage a Csm to play sort of quarterback there and work. With the associated or teams. Does this issue require ongoing technical updates or monitoring? In that case, I I point to a technical account manager and is the issue with a Beta product? You know, I've worked with different maturities of of product teams, and if you know they're launching a Beta product. I'll typically ask the Pm to handle some of those support challenges over sort of the support team or the Csm team obviously depends on the maturity of your your product team. As well as I mentioned before, I had an example of one of those decision trees, and this was actually, it's it's small enough to sort of easily see on this slide. So this is actually the relationship between the support team that I lead and our engineering team. But I think the logic is valuable that you could see how this could relate back to Csms and support as well.

so customer complains. We see the issue, and it will either go if it's a one off issue. The customer support team will investigate multi customer. The engineering team will investigate what I like. Here is this decision logic that we use it.

I can't figure it out, but maybe I could, I would open a ticket for support or engineering in this case, once it gets resolved, we then have a commitment to create a a run book in our organization. That's sort of basically documentation for how to correct it. So if there's something that the support team is saying, you know, this is an easy one. This comes your way. Instead of opening a ticket. Maybe they document it back for the Csm.

I like the tooling. There's no ability for me to solve this challenge. Similarly, they create the tooling for that and pass it back. They identify. The problem is actually in our system that would go right to engineering. So like I said, this is one that we've used for support to engineering. But this is just sort of the the rough structure I've used to develop decision trees. With my team.

Some other considerations here for structuring a good relationship between your Cs organization and your support for handoffs is in the past. I've led a monthly meeting with leadership to review. The ticket flows and recommit to those rules. So where is that decision tree breaking what is new that maybe we hadn't experienced before. Or maybe the product has changed, which is driving us to sort of force new rules that we can maintain and recommit to.

We'll also, as we get more mature with those meetings, break that out by segment. So yeah, so the enterprise workflow of tickets handled, and and where the challenges are can change from Smb.

I mentioned here at earlier, when I was looking at the farm system where I like to pull potential Csms over from, and being sort of our senior support reps. I just wanted to give it as much as I love those those folks.

I would encourage you to beware of the technical Csms as wonderful as they can be. They can become a problem. Where a Csm. Who comes from a technical background is able to handle everything a customer has a problem with and doesn't send them to support ever. You then go through an account transition to a a. Csm. Who hasn't come from that background.

and the customer is then disappointed. And that's that new Csm. Because their old Csm. Needs to handle all their support questions for them. The new Csm is then

looks like they're not able to to do the job. So be mindful if you're bringing in those senior former support reps into a Csm role, that they are following the same process as everyone else, and encouraging them to to work with support. It'll save you some pain down the road.

I'd encourage you also to make sure. So

Csms have support reporting for their book of business. Sometimes I'll see, depending on what system you're using for support tickets. If you're using a service cloud and salesforce support will just say I just chatted the Csm. On it to make them aware of the resolution, or or I. Just a lot of that will live in slack. I think if you're building this organization to make good healthy relationships between the team sort of transparency is important and making sure they've got robust reporting and not just relying on chatter and slack.

So have consistent language and rituals to coach customers on support. So when I have consistent language here is in our notion, or in our wiki. We'll give a couple of scripted talk tracks for Csms. To use to support the most common one is

Mrs. Customer. You know.

I'm on calls like this with folks like you all day. So if you have a problem like this, the fastest way to get it resolved is to go through our support team, make sure the entire team is armed with language like that, and then rituals for me is when at what point in their customer journey, or we reminding them and coaching to work with our customer support team.

As you're having some of these meetings, and as you're reviewing some of the rough spots, it may signal an opportunity for your organization to launch professional services. So an example here for me comes from toast. Menu management. A lot of customers would need to update their menu. They had questions on best practices. How should I? When should I? And that really wasn't a support question?
It was a bit of a usage question. But customers would call into support for it. And so for us. We realized that there was an opportunity to set. There was enough volume here for us to sell a professional services package around updating your menu. So keep an eye out for rough spots within this relationship as it may flag an opportunity for pro services.
And then if you within your organization have multiple inputs for customers to submit challenges and to route their way to customer support. I would
recommend systematizing that with rules by issue and not by team. So, for example, another organization I've been a part of. There was a lot of transitioning of account. Sort of customers would would sell their business, and others would buy it, and so we would have a decent number of change of ownership tickets for a while that was handled by the Csm. It was a bit of an account transition issue. We then set up our tooling for our customer support team to be able to manage the change of ownership process.
When we did that, we then had to road show to every other customer facing group within the organization. Hey, these tickets now go to support, not Csms.
When we could have built our system in in salesforce, which is a such a reason at the time for support tickets
to just route it by issue and not by team. So just a recommendation there when working with your support teams.
So another chat break here. What has worked for you in your partners in customer support as a customer success manager leader. Obviously, those are just some recommendations for me. I think this is a challenge that I've seen with a lot of folks before. So what else have we seen there? I'll take another look at the chat here.
Vanessa. Would you ever recommend splitting out the account management renewal function from the Cs engagement function. I had a situation where we split the roles, and we had a really difficult time aligning and making Kpis
reflective of the work being done. Great question, Vanessa. That is my next slide. Actually. So. this is the separation between customer success managers and account managers can be tricky and oftentimes the terms can be used interchangeably, like I I hear folks say, like, Oh, I lead it account management, or I am an account manager when they
they're truly a customer success manager.
This visual from the customer success collective, which is another resource for you. If you're looking for some ongoing, continuing education within customer success. I think they nailed it in terms of a simple visual that breaks out the differences between customer success, management, and account management. And as as you sort of consume this slide, you know, I'll share how we at overjet recently launched our account management program and why we did so.
So we had launched with a customer success management team and a sales team
within the dental industry. Our enterprise customers are these organizations that have multiple thousands, hundreds of clinics underneath them.

and the way that we go to market is we will connect with this enterprise organization, and then they will open up a pilot with us where they'll give us maybe one or 3 dental clinics.
and then we'll prove our value there, and they'll say, great. Let's scale this up to 20, prove our value there, and then scale it out to 50, scale it out to 100, etc, etc.
The customer success. Managers were great
getting those customers launched and proving value. They were not great in our organization and getting commitment for additional expansion opportunities. Our Aes were really great at getting that initial commitment upfront like, let us get in. Give us the opportunity to pilot.
and then they would sort of move on to that next pilot opportunity for us. We had this sort of farmer need to maintain the relationship of an account for a longer period of time. Get ongoing expansion commitments while the Csm. Was focusing on driving high utilization for us. And so that was the reason that we launched account management. So our Aes are responsible for bringing in that new account. Managers focus on the expansion and customer success at overjet focuses on driving success.
Let's keep rolling here, and then we'll come back to some of these questions. Oh, yeah. So another one. I this is a really common question. So
would love to just hear people drop in the chat. Do you have the Csms and account management in your organization? If so, why, what was the prompt? That sort of? Had you separate the disciplines. Similar to what I shared here at overjet.
Alright.
getting into the the sort of back half of my session today. This is an area that I called out at the top, I think, is most often talked about. It Cs.
The meetups that I participate in is the scalable customer success manager.
I think I just got a gift from Salesforce last year, when we added some new licenses. It was a little
fire pit and a snores packet, and the whole theme was, do snores with less. I think every organization is focusing on do more with less. And that's really driving a lot of these conversations on scalable customer success management.
And so when I think about the spectrum of customers we're working with and customer success, I view it as a spectrum between art and science and art on the Enterprise side, whereas your Csm's working with enterprise customers really have to respond to those individuals there they have to sort of improvise and play to the emotions or the relationships that exist with those customers most most of the time within Smb, which is where most of the scalability comes from. It's really more of a science. There. And it's about building repeatable processes, standard operating procedures, consistent inputs and consistent outputs. And so I'd argue that many that a one to many Cs team should be run more like a marketing team than an enterprise Csm. Team. They should have more in common with your partners in marketing than in Cs.
And so I I'll give you an example of a campaign. That we launched at toast. As we were sort of developing and maturing our one to many team there.
so the problem we had was that downsells were spiking specifically in our smb segment and online ordering due to a new go to market discounting approach. So we had offered a 3 months free on online ordering. There's a high attach rate coming into net, new customers.
and we just weren't able to activate these customers enough. And we were doing a ton of cold calling into low activation usages. We weren't getting through. Customers weren't taking us up

on the opportunity to help them. So we have goal to decrease the down sales by increasing activation, but without increasing the size of the Smb team. Right? We could have said, Hey for us to get in front of more of these customers, we need to add more
Csms. And so with the plan was we first did it segmented an Ab. Test group of unactivated accounts working with our business intelligence team, and we also aligned on a
measuring methodology to make sure that we're all on the same page of how we're gonna operate this this test.
The next thing we did was we took the one to many Csm team and we worked with the customer marketing team to reach out to a test group. What we asked Mark, our customer marketing team to do is focus on Cs qualified leads or Cql's, where we were making sure that the customers that we were spending time with were interested. And we're hand raisers and saying, Yes, I want the help, so that our Csm. Team wasn't focusing on the cold calls. For all of these customers
for the cold outreach. And then we ask the Csm's to maximize how many calls per day they could take from these hand raisers, and that the metrics that we measured here were the percentage of activation rate and the test versus the control group. The dollar retention of the product and the number of support calls per customer was a secondary goal. We wanted to make sure that we weren't sort of spinning up more support work as part of this
results where we saw activation and retentions. Double we saw the support calls cut in half Post Csm. Engagement, and the total error saved within this quarter that we were running. This test was 40% higher than the all in cost of the team running this. So this gave us a lot of confidence that this campaign worked. We should continue keeping this as an evergreen campaign to drive up activation and reduce down sales within this product.
So if you're thinking about launching, or you have a one to many program already, and you're dissatisfied with it. I wanted to go through some, a specific checklist that you can use to to think about building out your your program and also include some recommendations or tools that I've used, or that I'm interested in using for my scalable one to many Csm team.
So first, like a marketer.
understand? Your customer persona we talked about at the top here, making sure your Csms. Can persuade customers to take action. What motivates your customers to to change, take action and change their behavior.
which members of the team of your customers team do the actual work in the product. So we might have a billing contact as our traditional Co a con point of contact that we work with, or that we have as our decision maker. That might be very different than the person we need to persuade to change the the usage behavior. So make sure you're thinking about the right person within your customers organization to connect with
how and when do they want help? So there are different phases of the customer journey there. It makes more sense for them to take the action. You're asking them to take and so the example here, you know, to to return to toast is when a new restaurant was opening. When they first bought toast. All they cared about was making sure their physical presence was taken care of 3, 4 months down the road. Then they might be interested in in getting going with some of the additional features that were really important to us to protect against down sales. So thinking about the when within, the customer persona is really important.

How do they communicate with your team? You know I talked about some my background and working with title agents and restaurant owners and marketers and
you know, a lot of the time.
But one to many means. Or the scalable Csm is you're sending emails, emails, emails might not be the case. Some of the customers you have relations with on slack, so you'd be able to chat with them. Some of them prefer phone calls because they're not at their desk. They're in the field. Sms has been a huge win for me in the past, and sort of scaling out and automating SMS messages to our customers
and then potentially webinars. I almost wanted to asterisk webinars. Webinars is one of those ideas that on paper, and you're in a brainstorming session always seems like the right idea, and then, in my experience.
doesn't always get the traction we wanted to. So depending on your customer persona keep an eye out for the impact. The long-term impact of webinars.
And then think about, you know, is there sort of a
singular persona within your customer base? Or does it change from segment to segment? I'll raise here, too, that enterprise can benefit from one to many, you know so often we think about one to many is how we segment our Smb, or how we handle our Smb segments or our Vsm segments. But I've I've run models where we take the one to many campaigns that we're we're running. And if you think about that example, I shared of
the our dental clinics. Within overjet. An Enterprise group has a key stakeholders at the top level of the organization. But then they have a cluster of smaller. Basically Smb accounts underneath it. If you have a similar structure, I would encourage you to run some of those successful campaigns even within your enterprise program. Because it can be valuable. So don't don't ignore one to many concepts within enterprise
in terms of tools. If you're just starting brand new, the first thing you can do for one to many is, build out a great customer, education library.
and make sure you have self serve assets. So not just articles, but videos as well. And if you are writing articles I think the first and common trap I see around self serve assets is creating the user manual trap. And so if you look at the self serve articles from some Sas companies, there'll be 3, 4 pages long.
I'm a customer. I've got a problem. It can be tricky for me to find my answer really quickly, so I encourage you to, as you're creating self, serve assets to make them conversational. And if you're not sure where to start with that notion as a as an internal wiki also has the ability to publish pages externally, and that's been a really easy tool for me to just get self serve assets off the ground and and in front of our customers.
Next tool will be. Encourage you to automate as much as possible. With whatever product you or your marketing team has. So this is an another instance where I would encourage you to just get going with the tools that you have within your organization. So salesforce has automation functionality. Hubspot has automation, functionality marketo whatever system your
marketing team is using to automate communication is probably the same thing that you can at least start with
and then challenge yourself to get out of email. So, depending on your persona.
I, I think no. All of us have probably purchased software and none of us want an auto. Another automated email in our inbox. I'm I'm sure.

question how many of you would even respond to that? So much like Bdrs are exploring with different formats. I would encourage you to do so. Video is a great tool for one to many campaigns. I've used loom and vidyard. There's a new product that I just became aware of recently. I'll show you a little quick demo of it on the the next slide here called Video. Ask which gives you sort of decision tree logic within videos. So I'll show you that on the next slide here.
in product messaging has been a huge resource to stay out of the customers inbox for us to provide messaging as well as click along. So if a customer is brand new to a product, to show the little heat bubbles to say, Click here to get started, and then brings them to the next page. And now fill in your information to launch your first campaign. Those can be really powerful tools that I've used most successfully there. Pando
Gainsight has a second product they acquired called gainsight, Px, and app queues as a starting point for you.
and then scheduling tool. I think that
making sure that you're getting your small Cs team who's responsible for one to many in front of customers that are most interested or most impactful. Running, scheduling, using scheduling tools like calendly Chili, Piper, Hubspot, or even Google Calendar now has its own scheduling functionality.
As I mentioned, you won't hear the audio here. I I turn the audio off. But this is video. Ask. I saw this recently. I thought, this is a really cool product. I'm excited to use. But you can see here in the video
it's giving the customer the option, I'll run that one more time. So imagine this is a Csm. Asking them, do they want to schedule a call or learn more about something. If they want to schedule a call, they click that he confirms it, and then they have the ability to schedule a call right in that product. So this to me, really fits in the wheelhouse of the one to many concepts that I've used. Eric.
Lastly, on the checklist here. Make sure you're considering your inputs for your triggers. So what is it that's going to launch a lot of these one to many campaigns, whether it be customer health score nps, responses and razors. Support conversations can be a great lead generator for one to many, driving upsells potentially for the next best product. Or if you're thinking about one to many for driving upsells in the past, I've also launched something we use called lookalike scores.
and so we did. There is, we took customers who looked a lot like each other to understand who might be the next best fit for a product. So the idea came from, you know, if you've ever bought advertising through Facebook, you can submit a list of your 100 best customers and they'll spit back a thousand potential prospects. How can you do that within your own organization for upsells?
So we built customer profile categories at toast. And we would say, Okay, there's 15 bakeries on toast in Phoenix, Arizona.
and we know that bakeries function pretty. Similarly, we know that regionally they sort of have similar buying habits because customers expect certain things. And we had sort of the customer health score with them as the 3 big categories. We say, okay, 15 bakeries in Phoenix, Arizona. 14 of them have our gift card product.

This one doesn't. Chances are because it looks so much like these other customers that one bakery in Phoenix is going to be a great prospect for us to sell online ordering teams, or I'm sorry gift cards to so
creating a methodology like a lookalike score could be a great input for trigger. If you're trying to drive upsells
outputs. We talked about the videos, the help documentation one on one meetings just because it's scalable doesn't mean they can't ever talk to a person. Some special discounts here for a next best product. And then one other feature that I've been really excited about is templated Qbr or Sbr. And so slack. If you were to Google slacks Midas touch
after today's class, you'll see a great blog article in a video about how they use this sort of self made bot in slack that you could also use in your organization. But what it'll do is, it'll allow you to type in a command in slack, and it will produce a custom Google slide deck templated with all of the reporting that you would use for a Qbr. It really cuts down the time. There is some development work that goes into building. This is not totally off the shelf.
but a great tool and concept that I've used in running scalable Cs teams.
And then, lastly, in terms of a checklist and getting something like this off the ground. I really encourage you once you have sort of foundation of this to listen to your team. What are the boots on the ground saying on a daily basis, what is it that the customers need? And I encourage them to experiment but experiment scientifically? So I showed at the beginning of this, we structured the experiment. It's really important that we're a little bit rigid and methodical on testing out the impact of some of these campaigns.
So another prompt here to drop into the chat. What are some of the one to many tactics that have worked for you and your team? If you've run anything in the past I'd also, you know, one other thing I wanted to make sure I brought today's call is not just theory, but some tool recommendations. So if there are tools that you've specifically seen value from in launching one to many, that you wanna share, please drop them here in the chat as well.
adds community and newsletter as communication mediums as well.
Okay. And to close today before we go into open it up for more. QA. I just wanted to share some tips and tricks of of things that I've seen from chief customer officers that I've worked with that I've really appreciated as a Csm team leader. And to to make sure you all are successful in your next role as a chief customer officer.
So advice I have here is to talk to a customer every week in every segment.
I oftentimes see leaders with customer groups spending time only with enterprise customers, or only with escalations. You learn a lot from your happy Smb customers. So make sure you're spending time with customers in all segments, and not just the upset ones.
so I think some of my favorite Ccos that I've worked with in the past have kept a one to one relationship. They were their person. There was a a new feature coming out. The Cco. Was on the phone talking to them, getting their feedback on it. Typically, the customer knows what the relationship is. They don't expect them to be a Csm. And they might even have a Csm that they can rely on, but maintaining a long term relationship with it. At least one customer can be really valuable.
Make sure you're spending time building out good cross functional partners with other divisions, specifically sales marketing product. I'm sure you're all already doing that in terms of decision making that goes on within your teams. One framework that I've used in the past that I bring

with me to every organization that I've really loved is this, as you're talking about how to make decisions for you and your team is what's in the best interest for the customer.
Let's focus on that first. Then what's in the best interest for the company.
Then what's in the best interest for the team? And then, lastly, what's in the best interest for myself?
So if you provide a framework like that to your Csms to your Cs leaders. It makes decision making a lot easier. If you scare that same ethos.
Take the lead and over communicate when stuff happens. It can be
kind of chaotic when a
chief customer officer sort of lets the team. If there's a an outage or an incident or a major product issue sort of lets the team communicate independently with customers. I've always appreciated what a chief customer officer sort of wrangles and leads the communication efforts and then Western relationships with Bi and analytics. If this is your first time as a chief customer officer, and I think a lot of that bi and analytics resources typically falls to the go to market team. So the more that you can sort of borrow and develop relationships with existing teams. Can be really valuable. Good data is gold.
Some tips to avoid. Some mistakes that I've made. Is I? Recently, I I spent a lot of time talking about the proactive Csm, and how important it is. We want to use our data to be proactive, pro proactive, proactive, proactive. And that's that's our goal. That's our vision. Everyone should be that. And what I found was, I focus so much on the value of proactivity
and almost vilified reactive work that eventually the team started to power that back to me and to say, You know, like, well, you know, this is a reactive call with the. Should I be focusing on that, I I shouldn't be reactive. The reality is as much as we want our Csms to be proactive. there will always in a customer facing role. There'll always be an element of reactivity. So don't don't vilify reactive work as much as you push for proactivity as well.
you call it ken you call reactive, unplanned and proactive plan. I love that. I'm gonna borrow that language today. Thank you for sharing that
in terms of of contract commitments with customers. I'll always push, for, you know.
Contract commitments, I always say, are only as good as the payment terms. So know your audience. Especially when you're working on renewals and annual renewal and month to month payments
tends to be a month to month commitment depending on how your organization is structured. And then think about your leaders in their skill sets. And, as I called out, sort of that spectrum of art and science. A strong Smb leader, especially if you're focusing a lot on that one to many. Approach is going to be more of a scientific thinker. They're going to be more standard operating procedure. They're gonna function more like a marketer, whereas an enterprise leader may be more of that artist sort of building a team, more creativity and a reader of people.
so that's that's the topics we wanted to focus on today. I wanted to make sure we shared Kat. I wanted to keep 30 min for QA. If we had it only grabbed about 15 so again, here's the QR. Code for my Linkedin Page and the URL for it. My personal email address. If there was something we talked about today that you'd like to go deeper on that we didn't get a chance to talk about the QA. Please
connect with me on Linkedin, please, please email me, let's grab 30 min either on the phone, or if you're in the Boston area, would love to grab coffee with you.

and then we can get into Q&A,
so I will take off the screen share, so we can see each other
and dive in. So are there any questions? Hi! Everybody good to see you all
in the chat here, Alison, that we wanted to hit.
So actually Alison had to hop off. It's me, Kaylee! Hi! Everyone! So in the chat I'm not really seeing many questions again. I had to hop on midway through. So if there was something that we haven't touched on yet, feel free to raise your hand, and we can just get things started that way, and we'll just shuffle through those so apologies if your question got lost. But it wasn't because, we don't care about it. So please come off mute, raise your hand, and we'll get into it. Bash! It.
No questions.
I'll come off mute. I can't. I can't come off I can't show my camera. Sorry, but
e! There were a lot of things that you covered. But I guess back when you were talking about Nps. I, you know, and I think the Nps is usually pretty limited in terms of its value, and I wondered. You know what are your thoughts in terms of
various types of surveys at different points in the customer lifecycle? How it fits into a voice to the customer program. And you know, communicating back to your customers when you do have you know improvements that you've made based upon feedback, you know that. I mean, I guess that's how I'm usually approaching, whether it's nps or other things
that I'm measuring. And I'm just sort of curious. You know how you think about that, or if there's others that want to weigh in.
So, so I'll start, and then I would, of course, welcome other people's perspective on this. Thank you for the question, Jan. So for me like I said. Mps is A is a product metric, and I think too often it falls to Csms to sort of own that. Oh, manual. I'll call that. We're gonna hit, voice, the customer in Class 8. So
I'll share some other surveys that we've that I've used in the past that I like is sort of in onboarding a survey post onboarding that focuses on the ease of onboarding. What would have made this process easier for you we have. We want that to be an incredibly simple process. So that's one other survey will put in there. To understand the customers needs going through that. The other is a customer. Satisfaction score most often. This is or csat. Most often this is used in customer support. You know how satisfied you were you with the agent today. I've also used a Csat survey for Csms.
I sometimes sort of standardize that behind the delivery of a Qbr. Just because it is a a sort of consistent moment in time that we can use, or we'll just do, a blanket. Csat survey around Csms to a customer base. I know, Emmanuel mentioned. You'll hit voice a customer in a few weeks here. But what we'll then do is take all of the surveys that come our way. Whether Pcsat Mps are onboarding.
aggregate that information and use that at a quarterly voice of customer
meeting where we're sharing sort of the hot items that come through those surveys to our product team or to our go to market team. Those are
usually the 2 constituencies that will work with
that.
Rob. I see your hand is up as well. Did you wanna add or ask a new question?

Yeah, thanks, Mike. Good stuff. I I think I posted it somewhere in the blur of the chat. But curious.
there seems to be discussion. I've seen posts on it around this.
This bifurcation splitting of the Csm role to either pivoting more towards product expertise or towards you know more commercial orientation. So curious your thoughts on
you know where you fall on that, or what criteria you.
you think you know, might lend, lead you down a more technical oriented Csm. Versus a more commercially oriented one.
Yeah, I think I I well, one, I think it depends on the maturity of the business and how much you can afford right. Like most of the times, you know, if you think about the development of a of a company. So with engineering and sales, sales sort of is all everything customer facing and you introduce the Csm Csm
is support onboarding and Csm. And then, as the product matures and the company matures, you're able to to specialize more. So I think that's a key component of it.
by default. I lead towards a product oriented customer success manager, because ultimately what they're there to do is to drive up usage. Make sure the customers seeing value from the product, so that we can have renewal of the product that they purchased initially.
where I'll get more interested in account management is depending on the upseller expansion opportunities and how difficult the sales cycle is as compared to the skill set we've hired within customer success manager. So an example there just to articulate it.
Online ordering or gift cards.
Pretty simple product to understand. Every restaurant owner has used them before. Most people on this call have used gift cards or online ordering before. It's not a hard product to sell for Csms
at toast where we started to need sort of more commercially oriented folks focusing on the the customer
is when we made an acquisition of a payroll product. The sales cycle was much longer there. The demoing of the product was heavier, and so we needed to add, in sort of a more specialized seller to focus on that at overjet. We needed to focus more on sort of that expansion motion and that non stop closing ability at while at the same time needing to focus on utilization and customer happiness. So that's how I've gone about breaking it out in the past wrong.
Great thanks.
Jordan.
Jordan Barker.
Oh, sorry! Hi! Didn't know what you said my name, and I was I was just wondering with your pyramid of of Kpis. Some of the some of the conversations that we've had with our finance partners as well as the executives, is around the causality of our activities. Because so many teams within an organization touch a customer. I just wondered how you'd gone about project you know, potentially addressing that it was because of a Csm. Or a team that you owned actions with a customer. That product metrics went up, or you know, which led to expansion, etc.
Yeah, it's a great, it's a great question, and and one that I've felt acutely, I think you know, I'd return to that marketing. Does that that one to many campaign? I shared where we were really really structured with our Vi team going into that as we were working on this. There was also

obviously product doesn't turn off their updates in the development. So we had to segment an Ab test
where we were working with sort of a random sampling of control versus a random sampling of a test group.
this is
this came about because we really had to prove the revenue impact of this team as compared to the cost of them, if we wanted to continue building out a one to many program. So if that's the case, and you really need to push it. I I would encourage you to do an Ab test to to prove the impact.
that, and that can get tricky.
That's that's the only way that I've been able to do it.
Yeah. Great. Thanks.
Awesome questions. What else can I answer to you?
Mine
someone can hear me.
Lisa. Yes.
we can hear you.
I'm curious if you have had any in for your one too many campaigns or strategies. If you have a tested or experience the peer to peer or community engagement with people from different customers engaging basically creating a community around the product. I'm thinking, we're thinking something around that. Because for us, emails are really not working. People are on the field and messaging doesn't work and
webinars we are using. We have, we are measuring impact definitely working for us. But community is something that
it's in the radar.
It's easier to have that any experience on
found that.
Yes, I have. So great question. So for peer, peer and community. There's sort of a couple of different ways that this has come about for me, I think.
for community
and for one to many, and for it's scalable.
One way is
depending on the product, and where you work and what the ecosystem is around that it's kind of a fast way to also dabble in professional services. Right? Professional services can be a tool within your one to many tool belt. And so, if there are contractors out there who are
willing to have some of these training conversations or these deeper conversations with customers. And you're able, I think, the key there is making sure that they're they stay certified and up to date with the expectations of your product. We've then been able to
off board some of those calls, some of those questions to certified which is usually the responsibility of our customer education team, certified contractors
from a a peer to peer standpoint from a community engagement standpoint. We'll take a similar certification approach within a forum group or a community, you know. Maybe it's a sort of a housed forum that we own on our customer education site.

You, you tend to see these customers participating and and helping each other, and so we would sort of pick a few of those that were regularly being natural helpers.
Quickly work to get them certified, give them a badge within that community, and then they sort of maintain a sense of responsibility and pride in sort of responding to the needs of of customers within that. And oftentimes we would do that in exchange for a discounted rate on their software. So I think both contractors and sort of badged community members can be a a
tool. There.
Yeah, okay, that's great. I have not thought about the incentivization of it, but obviously that we'll go with it.
Sorry.
Thank you. So thanks.
Yeah, the incentivization. But also just making sure it's like a key to that is the certification right? And it could be lightweight. It can just be, you know, simple Google Google test once a quarter and making sure you've got sort of a bespoke campaign for them on any product updates. Because you wanna make sure if you are off boarding any of that, that they are staying up to date as as well as a internal team would.
Definitely. Okay, thanks for the input. Very interesting, very new for community engagement strategy. Yeah.
What other questions.
And last question, I think I'm interested. Come from a manager's smaller team and my team kind of manage everything end to end onboarding
adoption and renewals, upsell, cross side, everything. At what point do you see that that split kind of needs to happen, or should start kind of happening. Because even though we're, as I say, like we're scale up, we're a smaller team. I'm already feeling that like
pressure to split.
But obviously we don't have that resource kind of in house right now, so kind of curious to hear your thoughts on, that.
I know it's not totally black and white, but.
Yeah, but at a hundred customers, that's what. Yeah, there's no, there's no sort of magic number. So but I'll tell you that the framework that I've used to to think about that. I think it's around a head count capacity models right? And so typically you probably have a model today that say at every X threshold of AR that lights up another Csm to do all these things, and then you probably also have
goals from finance right in terms of upsells and onboarding process. And so as you're looking at, those those 2 tools are gonna be really important to look at together and to sort of play out with some models, to say, if I were to separate this
discipline, and that feels most compelling, and chances are you just talk to your team. You know what metric is most at risk by having them focus on those. It might be. You know, we're focusing so much time on our existing customers. It's hard to bring them through the funnel to get them live. So we've got a parking lot. We've got a backlog of not booked, but not live. AR. So that is typically the first split that I'd see. Is Csm to separate from onboarding.
And so if you were to model out a headcount capacity plan for onboarding, and then pair that with the increase you expect to see based off of productivity on some of the other key metrics. You can then use that with your finance team to build a a business case to do that. I also know

sort of the Macro State. You know the funding degree of funding that startups are getting now as not the same 5 years ago, 6 years ago. So it's someone dependent on there will willingness to to grow the organization, but those are the that's the method that I would use to make that business case internally.
Thank you.
You're welcome.
Probably got time for one more question today.
Well, I wanna thank everyone for joining today's class. A lot of you have already reached out to me on Linkedin. Even before today's class. It's such a great community. Be a part of thanks for letting me join it today. And like, I said I, I shared my Linkedin. I shared my email. Please don't be a stranger. Hopefully, today you saw how much I love talking about this stuff. With with people in the industry. And it would be a privilege to be able to continue this conversation with you all. Thank you.
Thank you all so much. We will see you back here next week for our deep dive on customer support. And once again that survey is in the chat, so we always love those surveys from you all. Thank you. Have a good Tuesday. Thank you so much, Mike.
I guess.

Class 5
text
Hi! Everyone! Welcome! Welcome!
I will give you all a moment to get connected to audio. We appreciate your patience as we are just getting rolling here. We've got an excellent class for you today.
If you are willing and able as always, please feel free to turn your cameras on. We would love to your see your faces, and we know this is an excellent engaged group, so it helps participation by asking questions. Feel free to make it your own. If you'd like to have feedback or comments, especially if there's something personal you are dealing with within your own business world today.
My name is Alison, I will be your host today. Please feel free to send me a direct message in the Zoom chat or on slack if I can help you in any way, and welcome back to week 5 of those of you that are just joining Cco. School. We have made it this far. Congratulations to those of you, and it's wonderful to see some familiar faces.
Alright, friends! Well, without further ado, let's get started. I am thrilled to be here, and even more thrilled to welcome our instructor. Today we have Shawn and Shawn is the president of customer support at Duchy as well as a professional speaker and author. I'm gonna share those links to his book as well as his Linkedin. So you can check out all the fascinating details about Shawn. But without further ado, Shawn, let's deep dive into customer support. Thank you for being here.
No, thank you for one. I'm elated to see you all. It's a pleasure anybody who works with customers on the customer space. I just think that we're a special set of human beings. So it's awesome to see that you all have grown amongst the ranks of where you are, and you're continuing, continuing to pour into yourselves, because we know as we develop ourselves, it's how we develop others. So we'll go ahead and dive into it

so fair just putting it out there. I love questions. So if you have questions, feel free to drop them in the chat, I'm gonna make time on every single slide to make sure we answer anything. So I do want it to be a dialog. I'm not the person who says, Hold your questions to the end. Go ahead and get them out, because I wanna make sure we're addressing as we go. But shout out to Angie with the batman or or bat woman icon, because I'm a big batman fan, so I love it
a little bit about myself, you know.
Long story short.
to be honest, the working in customer support, customer care, customer service honestly saved my life. You know I was that kid who was a high school dropout. I was homeless for a period of time.
and if you looked at where I was, then you would say, this individual is not gonna make it anywhere in life. You know. I was literally told that he's a waste of potential, and I'm a first generation American. So if you're if you're like me, you have immigrant parents for you to not finish. School is something that is taboo. But thankfully I ended up finishing it up. But what turned my life around was working in the contact center space. Because I worked in an environment that developed me grew me.
gave me actionable feedback, but also an opportunity for growth that you just don't see in every single industry. So I'm highly passionate about making sure we continue to pay it forward. The next generation
I've been working in the space for over 20 years. Now I was an outsourcing for over a a decade where I was overseeing accounts in excess of a quarter of a million dollars a year or sorry quarter 1 billion dollars a year, where making sure that we're profitable will be all. We're also balancing the customer experience. So now I do work for duchy, as Alison mentioned, and we'll go ahead and dive into this lesson today.
So the first thing I wanna touch on is just what we're gonna go over. We're gonna first dive into the support overview. We're gonna talk about building a a a center with momentum on, what does that mean? How do you build a momentum in a support center? We'll discuss discuss folksing in your foundation, mastering performance and curating an innovation center, you know, thinking outside of the box. Then also optimizing for scalability.
then we'll land on some final thoughts, and if there's any additional questions we'll open it up. As I mentioned, feel free to drop questions as we go along.
So the first thing I want to talk about is the overview.
the way I look at support. What is the overall mission of support.
And this is not something that I landed on. Initially, it takes years of being in the, in, the, in the environment, understanding that
ultimately we have one single purpose, one single Mensch Mission Nice. To make sure that support is viewed as a product.
You know, how do we have our customers view support as an asset as the reason for why they want to do business with this organization. How do they know that if I ever have trouble, or I have an issue. I can go and hone in on this organization, and they're going to be there to support me.
So at the same time you want your not just your customers to view you that way, but also your organization. To view you as an asset and say, this department is adding value to this

organization as not a cost center, but a value center and even a profit center at times. So we're going to be talking about how we can grow responsibly while balancing customer experience. So the first thing I want to ask you all
what words come to mind when you think of these brands, and feel free to come off mute if you can. I want to know what you think about when you see these brands.
Iconic.
Love it, iconic.
We have some great comments in the chat to loyalty. Mega corpse again, icons, leaders, quality.
Hmm.
Memorable brand value.
Bandwidth.
I love the great support, consistent experience, reputation. And I think we we hit all the marks, you know, when you think about an organization.
especially these organizations. They have great customer experience. But why? A big reason why is it is consistent? You know what you're gonna get from them when you do business with them. I know when I open a coke it's gonna taste the same way I expected to taste. I know that when I'm reaching out to Amazon. It's gonna be an effortless experience. When I'm dealing with apple. I know the product is gonna be designed a specific way, and it's gonna be intuitive.
We can do the same thing with our support centers. But also, the one thing that we can do is make a memorable, you know. Always tell my teams that
ultimately you want your your support center to be to be viewed as knowledgeable, relatable, empathetic, but also memorable.
So when I think back to my childhood back when kids played outside. So I'm a little bit older, you know. We'd be out playing in the hoses, running to the ice cream man playing water balloon fights, but grabbing a coke and opening it up is a core memory that I will always have where it's just a positive thing. So it's the same thing. Where? Where, if my customers are contacting our our center, I want them to have positive memories versus negative memories and working with us
so great call outs, and I love that jam cutting edge absolutely. How do you stay cutting edge? So
I look at support. Customer experience as really based on 4 bill pillars. It's built off of 4 pillars. And how can we maximize that? And this is actually something that I came across. When I used to work at Comcast, our Cx. Team, we locked ourselves in a room over the course of several weeks, just saying.
How do we figure out, what is the optimal customer experience? What does that look like? How do we maximize it? Because if you're customer of xfinity, you know that they've had a worse reputation when it comes to customer experience, and it was definitely top of mind. So there were 4 key pillars we landed on, and the first one was
always on
customers. Want to know. Your product is always on to be honest, if I never have to contact you, that is the best experience you could ever provide me, because that means that you have a stable product. Your product is available.

Number 2 always available for any of us who ran any support centers or even contacted a support center. You want to know you're right there and available, and one that's happened to me. I'll give you an example. A couple of years ago I was bringing my family to Disney, and we decided to also invite my sister and my niece.
and the challenge. Was that the way that we purchased our tickets? The time because it was during Covid was very. It was very difficult, and I couldn't get them on the same pass, so I called into Disney to see if I can make it work out. It took over 3 h for me to reach somebody, and I sat there waiting on the phone because I did not want my niece to miss out on the opportunity. And when I finally spoke to someone for maybe less than 3 min. They couldn't even help me.
But that waiting, that that experience, if it's sitting there is is something that I constantly think about. How do I avoid that with my customers?
The next thing you think about is make it effortless, that contact rate. How do you make sure you're providing self-service options to your customers, where, if they want to reach you, they have multiple ways of doing so, multiple channels of doing so.
The last one is own it that really ties to your resolution. Times we want, they want. When you have an issue, you're actually owning the problem. You're resolving it as quickly as possible.
And usually, if you can get these 4 things right, that will lead to an optimal net promoter score.
Now I'll pause here for a little bit to see there's any thoughts, anything else you would add to this that I'm missing off these big 4.
But I'm.
Katie, Katie here I just had a question. I threw it in the chat as well. I'm not as familiar with the contact rate metric. Could you define that one for us.
Absolutely so, contact rates could honest honestly be measured in multiple ways. But essentially what it is you're taking your total amount of volume receiving. So if you're receiving calls, chats, emails, or tickets, and then you're dividing it against the denominator. That denominator could be number of customers, your customer base, it could be locations. But essentially, you wanna keep track on is that contact rate changing? So we know that
you can't just look at straight volume because your customer base is more than likely growing over time as our organizations are growing, so you want to divide it into a denominator, so you can know whether or not you're getting better at it.
Thank you.
I love what Igor says. Quality answers are important beyond quick and valuable answers, absolutely, absolutely. If you don't own it, and then it's not quality. I I could care less, you know. I wanna make sure it's a positive experience. And even in some of my singers we've heard of some of that where it's, hey? Give me the right answer, and also they don't want a lot of fluff. Don't give me too much, Fluff. Just give me the right answer with some empathy
resolution. There's the keyword. Absolutely not just tickets closed, but tickets resolve.
All right, let's move on.
So
this is something that I I stumbled upon, because I think all of us have actually worked in support centers or with support centers at various stages. And then there's really not a one size fit all approach. It depends on where you are in your organization. So I wanted to be able to share this with you in these various stages. You know, you have that startup when you first have

a a support center that's launched at a company typically everybody's working in support. You know you're a smaller organization.
It doesn't matter what your role is. You're gonna jump in and make sure you're handling those tickets, and then you evolve to a place where you say, now we're triaging. And this is when you start saying, let's get a couple of experts who can actually specialize a little bit to be able to address these issues. But it's still not quite in a formalized fashion. But you're getting more organized or organized. The next phase is organized. That's when you start to bring in what's called an Acd platform. And you're routing customers via
Ivr. You're having some structure and you're having some team, and then you get to that next level where it's evolving. You start really looking at the hierarchy. What are those subset roles we need up to departments like quality shirts and workforce management.
and then you start to get to the place that most centers don't get to. But it's an asset, you know. This is when the Cust Company is looking at you as a tool or an assist in the company, you're you're someone that or you're a department that adds value to the bottom line. They're really feeling as if you're an asset to the organization versus a cost center. Then the last one is Cx centric.
This is when really the entire company aligns with the logic of the center. So if you think of Zappos, they're a great example. If you know about Zappos, they they wrote the book on creating great customer experience, and what they essentially did was they wrapped the company around the experience of the a customer and the experience of the agent, and they removed a lot of levels of hierarchy to make it more
more equitable and also more understanding towards. Let you do the right thing for the customers at the right time, and put our employees in a in a place where they're also at their best self. So I would love to have a poll in the chat. I would love to know when you look at these 6 stages of centers, if you've worked in one led one or have one in your organization. Where do you think you are today?
That's this triage.
Wow! A lot of startups, more startups than I expected
this phenomenal.
Andrew, I like that.
So, Andrew, touch on that a little bit, if you wouldn't mind. I like how you said that. You know you're an asset today. But you've left CE. Centric. It's wonderful when you get there. You know any, any insights about what made it a wonderful experience.
I think, for at the firm I was at we were. We were selling a very technical product and our target. Our Icp was decidedly non technical right. This is a classic saas story and our end users had no interest in being technical. Our industry was innately technical, and the product was really multifaceted
and
to, I guess, to exasperate things. We were a rollup company. So we're buying a bunch of companies are doing the same thing. So a lot of our investment was not in product, but it was in stack and integration, right? And so we were supporting tons of different experiences on the same product and start, you know, cross selling and and all that stuff and support
took the

kind of became the dumping ground for negative customer sentiment as a result of a bunch of other business activity.
And we started looking. Our our cost to support was ballooning.
and so the company. I it was sort of like
an opportunity from the ashes sort of situation where we said, we've got to fix support, for there's a critical problem here. And as we dug in, of course, what we found is we didn't have, as as everyone everyone already knows, the end of this movie, we didn't have a support problem. We had a product and customer approach problem at the company. And when everybody all the way up to Cfo and CEO realized, oh, like this! This cuts across the balance sheet cuts across our public reputation. That's across everything. There was the impet. There was like the the fire there that was required for the company, become a customer centric company, and get very passionate about being sport led and customer experience led in product roadmap and a lot of these other things. To drive retention and customer expansion engagement. And so we had, you know, we kind of had to hit our bottom before we got to bounce up it. But it was wonderful. We got there.
That's perfectly said. You know to your point a lot of what will drive. This is when you start having your your sales reps. Come back and say, Hey, we're having a hard time selling this product because there's a lot of fun in the market about. Can you trust our support team when your Csm's are saying, Hey, I can't even do upsells or retention plays because of the fact or expansion plays because of the fact of they're concerned about support and into your point it normally goes back to really what's happening with the product and stability. Now, we'll touch on that a little bit later. But that's perfectly perfect. Tia.
So what I talk about is building a center with momentum. And over the years I've had the pleasure of moving across several organizations, and I tend to come in with the same philosophy. Each time I tend to love to join organizations that are either in the process of rebuilding or starting from scratch, because that's where you can really have the opportunity to to bring some of these new ideas to. For to the forefront, whereas when you're more established, you're you're a little bit slower in your ability to be agile.
So
one thing I talk about is
4 stages of momentum a favorite leader of a leadership expert of mine is John Maxwell, and I love that. He has his quote about momentum, but the way he expands upon it is essentially you want to create an organization with momentum. And the reason why is that that if you take a train going 50 miles an hour, it can break through a 5 foot still reinforced wall without ever stopping.
But that same train, if you put a one inch block in front of its wheel when it's not moving, it can't even move.
And that's important to me, because we've all worked in companies or departments where every little problem that came up, you would derail the day. So you wanna be able to create systems and processes where you can continue to move forward. And it's more like a flywheel, where you can go ahead and take on those challenges that come, and it doesn't stop your ability from being able to still manage the business and be innovative. So in these 4 phases that I break out.

the first one is across the foundation phase, you know, for 3 months, and this this timetable can adjust to your liking. But I typically do it over this timetable for that first 3 months. I don't want to run into the department and immediately want to change everything

I really wanna hone in on the foundation identify? How do we make our our, our core pieces that allow us to be scalable over time getting those key attributes in place, whether it's key. You know, kpis, key roles and responsibilities, sops, etc. Really, exa, estab establishing that the next phase what I call the master phase. That's when we launch performance. And we're gonna continue to run the play. We're not gonna iterate on it. We're gonna manage it a specific way and run that play over and over again.

And then the next phase is the innovate phase. Now that we've mastered it. Let's get to a place where we can start adding some innovation till we can do what we do even better. And then from there you have what I call the optimize phase. That's where you're reducing cost. That's where you're becoming that value center. So I'm gonna dive these 4 levels as we move forward, so I won't stop here. But let's let's dive in a foundation phase first.

So really, when you look at the foundation phases, there's 4 key roles that I'll look at here. I'm missing a few. So you're not going to see everyone here. But there's 4 key roles that will impact your department.

So you have your support agents, and that's really gonna be your individuals. Who are that voice of the company. We talk about voice of the customer. But really these are your voice, the company these individuals will be tier, one. Specialists tier 2 specialists, maybe even tier 3. Then you also have support engineers that are that are your buffer before having to escalate to your actual engineering and R&D teams

from there. You wanna have that leadership team that's developing them. This can be created in a multitude of ways. Typically, you'll have an operations manager, a team manager, subject matter experts that are there to help or coaches. But really these individuals are all about developing, and this team and really building them up. I tend to look at my sneeze or coaches like my floor walkers. You know. Those are the individuals that are just there. When you need a question, you need some help, whereas your team managers are there to coach you and guide you on a regular basis.

and then you have workforce management. If these are your partners, you know I I it. Without this group you will find yourself in a place which we'll talk about in a little bit. You'll find yourself in a place where you're constantly working behind the 8 ball, both the workforce managers. You'll have their leader. But then you'll also have a team of real time analyst scheduling analysts and forecasting analysts. And the way I view it is that your forecast is essentially you're looking up to 18 months out. You wanna have one great day a year from now.

So you're planning for it, and then you get to a place where you're scheduling for it and making sure you have the right amount of bodies there and then you have the actual day of the Super Bowl that's every single day where your real time analysts are now saying, we plan for this much volume. Plan for this much staff, but we have to adjust based on the reality.

And then you also have your quality assurance team. And these individuals are really your quality manager, but your quality and analysts. They are holding your team to a standard. What does that rubric look like of what you expect your employees to convey to customers when they're speaking on the behalf of the company, because we wanna make sure we're having consistent messaging and we're driving it out there. But we also wanna be able to acknowledge

where people have gaps, and how can we help them improve? So usually, when you have these 4 groups working together. It's really the
3 to support the support agents. They're really gonna be able to put them in position where they have a stronger level of development. And it's an investment. But at times to worry the investment because you get the best out of your reps.
Before I move on I'll pause here. You know any questions or feedback. I know I'm missing certain groups like your training department, etc. But these are kind of your core. 4. You'll deal with.
I apologize for a moment. I did get kicked off of zoom I'm back on, so I'm monitoring the chat. So sorry about that. If anyone has any questions or comments, please feel free to come off with mute.
Thanks, awesome.
I I guess I'm wondering, and I don't mean to throw you off here, but you know, given AI is so prevalent now. Where? Where do you find that you want to start to integrate? You know whether it's tools or or AI. I I appreciate that you're focusing on the people.
But I think also, increasingly, we're having to develop more profitable post sales, teams and thinking about how we can do things without people as well.
No, it's well set. So we'll definitely give. We get to the innovation phase and the optimize phase we'll dive into there. But you're absolutely right it it gets to a point where now our world is changing and how we support our customers is changing, but also how we support the people is changing as well. So I think that when it comes to any AI or workflow optimization, it's not just to to improve the customer experience, but also the employee experience as well.
Thanks. I appreciate that.
I love how Angie says we also don't have a dedicated Qa. Team. Sometimes I feel like we asked. Too much of our team leads to do both Qa. Effectively and lead their teams. But but don't have the budget to grow the team. I get it. I've been in that place as well. The challenge with when your leadership team is is qaing.
especially if you want to hold them to a standard. And I'll also put that on your leadership team score cards. Yes, if you're kind of allowing the person who's the auditor also control whether or not the score is a good score. So you really wanna have that third party? So even if you did it in a way where you said, Okay, we don't have the budget for this today. I would actually have a different leader audit a different team
that way. You're still getting that non-biased approach, and you have a third party overlooking it. And then, as you get to a point where you scale, you can break that out.
Great! Call out.
All right, we'll move on.
So the next thing we wanna talk about is folks from the foundation? These are just your foundations. As I mentioned, this is your baseline to get you up and started where you need to go, and then from there we'll innovate with some some iter will iterate with some innovation. But really, there's 3 key strategic teams themes we like to look at as we talked about earlier, always available us, that agent productivity owning it. That's your customer experience and then support responsibly, which is cost management, which is something that we're all having pressure to do. Well.

my north star, Kpis I look at, for example, are going to be your response. Time, sla, so that response, time Sla is is all about. You know how quickly you're responding to your customers. You set the mark there one tip. Whenever you have a service level targeting your organization, it actually has a cost associated with it.

So if you want the higher your sla target, the more expensive it will be because you're essentially saying I needed my agents to have more occupancy based into their schedule. I need them sit more available so that they can actually accept new volume coming in and the lower your target, you'll get to a place where you save a lot of cost. But there's a breaking point. So you you wanna find that inflection of When do my customers feel as if we're providing a great experience versus when my cut employees are feeling like we're burning them out.

So it's a balancing act. But really you have these key objectives that handle time. You know. How long is it taking for your employees to actually work each ticket? I don't believe in coaching to handle time. I believe you look at handle time as an indicator of where there's an opportunity and to improve. And then you look at what that person's doing. Are they repeating themselves too often? Are they taking too long on certain processes. They shouldn't be taking long a long time on. And that's really what you want to coach to

also agent availability, are you where you need to be when you, when we need you there, attendance, adherence, capacity, planning, forecasting, accuracy, all these things tied back to do. I have the right head count here at the right time to be able to support it. But all these metrics will impact your service level.

Then you have your csat, you know if your organization, who uses Csat some use Nps. But your customer satisfaction scores essentially our big metric that we are going to be looking at as well as that time to resolve.

So what we're gonna be looking at there is that interaction quality score. You really want your quality assurance team or your leaders doing quality assurance to be that group that's being able to audit and make sure they're getting close enough. That customer satisfaction standard. And what I love to do is to look at. Is there correl enough correlation between my customer satisfaction score and my Qa. Score?

It won't always be the case, because there'll be certain issues where your your customers are just frustrated, because maybe it's a repeat issue. But it when it's within the employees hands. How did they handle it. Also, escalation rate escalation rate is one that can jump up your cost. I look at escalation rate to a T, because

that means that

your employee is having to take that ticket. They couldn't resolve and now escalate it to either tier 2 tier, 3, or our support engineering team.

and from what I've seen in studies. Every single time that you escalate a ticket you lose about 20 to 25 points of Nps on that on that ticket. So customers get frustrated because they're having to wait and get bounced around. So the more you can bring that down the better your cost will be. But it also would do a better being a better experience for your customers. And of course you wanna have that Fcr, which is first contact resolution.

And then you have your training completion rates? Are they training? We'll talk a little bit about this later chat by the email bot containment. Are you able to contain or deflect volume from your center, and make sure that your customers can get it where they need to can get it in a way that's more quickly without having to use labor costs same thing with kb, article, creation

knowledge based articles. Are you creating that are using your agents to create knowledge based articles
so that your customers can leverage those articles versus having to call into your support center. So these are the things that really show up under the own. It platform.
and the last one is support responsibly.
This is my favorite, a cost per ticket in your contact rate. Your cost per ticket is going to be something that's critical to your business. If you are a new leader taking over an organization the very first thing I would look at day. One is, what is my cost per ticket.
because that is gonna be the benchmark for your success as a Cx executive, especially support executive. So you wanna be able to over time, get this cost down, but do it in a responsible way, because there's ways to do it. But it may break your customer experience and it may cause more attrition. So you wanna have strategic initiatives towards improving that. But you wanna look at your contacts for your customer locations. However, you wanna benchmark that?
What are those support expenses? What are the some of the software and tools you're paying for? That may be unnecessary. Then I'll of course we'll talk about this a little bit later on, too, is your vendor partner allocation? Do you have a vendor, partner? You're outsourcing to what percentage of your of your volume are you outsourcing?
So let's go ahead and head over to the chat. So I see some content.
So Dave says, how do you find the best way to show the CEO Board a meaning, a meaningful summary of these Kpis? So they aren't just seeing business as usual. Metrics. Absolutely. So it's funny. I have a very simplified version of this. I have it even with emojis. It's 3 key pillars that I show. It's just the 3 key, 3 kid key pillars, and then we can dive into it if they want to go into more. The first thing I'm gonna always show them is customer satisfaction.
you know, and under that customer satisfaction I'll call out, here's how many incidents we have this month. And here was our escalation rate. But really they want to see what are our customers saying when they contact support?
The second thing that I'll show them is, gonna be that response time. How long is it taking for us to actually respond to our customers? And there there'll be times where they may want us to swap that out for resolution time. But it just depends on what the focus is, because, some of the feedback you'll get, especially if you have a Csm team is I reach out to support. But no one was there for me. You know I'm waiting my business. I'm running a business, or I'm a consumer, and I have a product. I want it to be handled quickly, and the next thing I'll show them is contact rate. That could either be your contact rate or your cost per ticket. You, you decide what that is. But the reason why is because that becomes a shared metric between you and your R. And D. Department. We'll talk a little bit about that later. But those are the Big 3, so that I'm showing today that I may rotate out. But it's really as I mentioned your Csat, your response time service levels and your contact rate.
Andrew says I like service level and Csat as the exact headline metrics. You can decompose service level. If there are certain components that are real gaps for your org. Absolutely, I agree because service level, really, there's there's so many indicators as to why service levels going poorly. And it just really means you don't have the right staffing at the right place.
and there'll be times where finance will say, can you hold off on? Ho! Hiring right now? So you want to be able to communicate? If we do this, here's where our service levels will be. Here's what the customer experience would be. And here's where the employee experience will be.

I love. How may well set this the mesh for her board were csat costs per contact and first call resolution rate
perfectly sad.
So let's get into how it looks on an agent scorecard. I try to limit what it is on what? How much you put on the agent. Scorecard. Really, some of these metrics go back to your agent, Scorecard. I won't tie too much. I won't spend too much time on this slide. But really, when you're talking to your agents, you want to be focused on these key things, their handle times, as I mentioned before, but you want to coach it in a way where it's how do you improve it? Their availability, their attendance, their schedule, adherence, schedule adherence. If you're not sure what that is. Schedule adherence just means that
when we schedule you, for out throughout your day this is your time to be on chat. This is your time to be in breaks your time to be back in chat. It's your time to be in a coaching session. It's your time to be in on lunch.
You ideally want them to follow that pattern. They won't do it perfectly so. Your goal will never be 100. But you may have a goal. That's, let's say, 85, 90. And my center right now is 93%. But you essentially want them to be able to follow that because the challenge is that we're dealing with real time volume. So if you don't have the people there to be able to catch the pitch.
It's the ball's going to get dropped. So you really want your employees to be where you need them to be at the right time, but also give them a little bit of wiggle room so that they can make mistakes that won't be perfect.
Then, of course, on the own it, we go over their quality scores within their escalation rate, their average time to resolve when it's not escalated. And that's the key point, because when you escalate, a ticket is now the next party's hands, and that I won't hold accountable to to the first party. I'll make sure there's held accountable to what they did not escalate. Then also their training completion rate. And it's it's critical, because in an environment like support.
they're going to constantly be up trainings and upskillings. The reason being that your product is forever changing, and your employees will always have gaps you want to be able to fill.
If your employees are missing those trainings because they called out of work. Or you're doing more learning management system trainings where they can self pace. You. Wanna stay on top of that because you don't want them to fall behind on their development. So I do keep that as something that we monitor as well, because it's just as important to us. We see it a lot. Our customer feedback. We see a customer saying this rep was nice. They just didn't know how to solve my problems. We wanna be able to address that.
So this one, we'll we'll get a little bit more interactive. And we'll talk a little bit more about this one. So be ready for some any questions or feedback you have.
Now, we wanna talk about in our foundation. We wanna identify what are our channels, you as a support center. You may be so early that you can only have one channel and say, You know what I can't service that many channels right now, or you can only have 2 channels. Now, if you wanna put yourself in a position where you say, what do I prioritize? And what's the benefit? Or maybe you have all channels today. You're saying you know what I wanna scale back because this is not as efficient as it could be. And I'm seeing a way to improve cost. So one of those ways, one of those channels would always be chat.

What I love about chat is, it allows your customers to connect with you real time, but it also has the concurrency factor. So as an agent, I can work 2 or 3 chats at the same time depending on the complexity of the problem of the product.
And what I typically see is a 30 or 60 s service level target where you want them to be able to respond to those customers that quickly on the initial response. But I look at chat as our cost, baseline, because we, you typically chat will be your most affordable channel.
So in comparison to phone phone is great because it allows you to deal with complex issues and ask questions and not necessarily have long pauses in between these interactions. Now, it's usually the same service level timeframe of 30 to 60 s. But typically your phone could be 2 to 6 times the cost of a chat interaction. So you wanna think about hmm, losing that concurrency factor? Is it truly worth it?
The next one is email. Now, what this allows your customers to do is is work with you in a written form. You see a lot in B, 2 BA lot of customers that are on B 2 B wanna be able to CC, everybody at their organization. And they may prefer an email. But it doesn't work out well when there's a an urgent matter. But where? What the advantage is is that it reduces the level of urgency you need to have in your organization, because
the even though these are coming in real time, they're not real time interactions. You're gonna build up an email queue that you'll work consistently over time. So it allows you to pace yourself. The challenge is that even though it has a better service level timeframe for you to get 24 h to get to these. It's about 5 to 8 times the cost of a chat interaction.
So the way I look at it is, I rank these
now rank them by urgency and urgency, just essentially says, for your center, for your team. What is this level of urgency you need to be able to have, and of course, the the to me, the the less urgency is, the better. Right where it gives me some wiggle room. I look at efficiency. How efficient is it, how cost! Effective is it? And then the last one is experience. How is it for the customer when the customers on this interaction? What does that look like for them?
So the way I ranked them is for urgency. I put email as number one
because urgency, it gives you the time the bandwidth. If you're a smaller center, if you're still in your startup phase, you don't have to worry about the back to back interactions. Or let's say you have low volume. It could be even worse, because you can't predict when that ticket or that calls gonna come through. So now you have to keep someone sitting there for a few hours waiting for one phone call, whereas when you tell someone that you can do it via email, you could now use that one rep more efficiently because you have 24 h to respond to that email
email versus having a commitment of 30 s to 1 min
for efficiency. I put chat as Number one by far because of the concurrency factor. However, I'm gonna pause here, and I'm gonna ask the group.
Which one, do you believe has the best customer experience
chat phone or email.
And he says, Phone
Britney says, phone phone phone.
Andrew says, chat
and Matt says, chat. All right. Let's see. Depends. Manuel says, depends absolutely. Now, I ranked phone. But really it depends because I'll be honest in my center chat has the best

customer experience. If you look at our csat scores by far. Customers are far more happy with chat. However.
the ease of rep to to Claire's point, the ease of resolution on phone is just there. You can really solve those problems. Say, Hey, would you mind going to check this out? It's just an easier conversation is better flow. But it really does depend on your center. And how good you are at what you do. But I do. Rank email is the worst, even though there are times where you know for your customers it could be beneficial for them. Typically it has
not the best experience in my center is about 20 points lower on the Csat scale from a chat. because so much back and forth. Think about the number of times to go back and forth.
I'm gonna scroll up because there was a question.
So Jan says our reps can curse. Not to escalate is the escalation rate blamed on the rep. Seems like could be a just as problematic if an issue isn't escalated. That should be absolutely so. I tend to look at every metric as a range. I don't want you too high. I don't want you too low. I'm I'm always looking at who was right there in the sweet spot. Because
essentially, you don't wanna encourage the wrong behavior if something needs to be escalated, have it escalated. What we do is our support engineers when they actually Qa the front line. So when the front line is sending over tickets to them that shouldn't have been escalated, they'll fill out in a coaching form for their manager. Here's what was escalated improperly. And here's what they should have actually done instead. And that way we can help change that behavior. But essentially, I I would never coach them to say, Don't escalate, it's more so. Just an indicator, for let me look into this person a little bit more, and figure out what's going on with their tickets.
Jeremy says it, I imagine, depends on your demographic of customers, too. I, young people for preferred chat to phone absolutely, you know, even in our business, our our enterprise customers. We're mostly B 2 B, our enterprise customers prefer email over anything else, even though they get frustrated with how long it can take with correspondence, because there's some back and forth.
They just prefer that way because they they're able to document it a little bit better and copy certain people, whereas our smaller operators are smb customers by far. Chat is their best way. Unfortunately, still, a lot of our customers forget that we even have phone. You know, it's just something that they don't think about anymore. So phone continues to be our lowest volume driver, even though it's out there. People today are leaning more towards written channels because it allows
them to do multiple things at once.
Well, said Andrew, I think chat's overtaken phone the last couple years. You can serve customers with so many tools and bits
of data live through chat. Now, exactly. You can even do a live zoom call through chat or screen share. There's just so much you can do with chat now that makes it more available. In addition, we even had it built to our product. So on our back office of our product, our customers can hit the chat button and start chatting with us instantly, so it makes it effortless for them.
Don, says Sean. Do you factor in the industry based on your channel of communication? Yes, absolutely absolutely depending on the industry you're in. It'll it'll definitely depend.
But I look at the industry then also just the market size, you know, as I mentioned, are you looking at enterprise customers, men, market. Smb, but on average, typically, this is the experience you'll have with these channels because of where they they rank. But absolutely.

And he says, I think channel preference is sometimes driven by generation of customer and complexity of problem absolutely.
and Emmanuel's escalation rates are really important to track and dive into, as they give you so much insight into either the agent or the problem or the channel. That's perfectly said.
And and, to be honest, there are sometimes some issues that should not be over certain channels. So I've worked in an environment where we said we would not take this type of ticket over chat. It needs to be a phone call because of the complexity. So you have to be aware of that as well.
All right, let's talk about alignment of resources. So one thing that whenever you join a team, or if you've ever been a part of a company
with your foundation phase, you never want to argue over data. Right? So you wanna lock that down first, because typically it's my report says this versus what your report says, or we have a report. But can we trust the data? So you wanna really get to a place where your centralized reports, you identify? What are we looking at? What's gonna be consistent? What is our overall department scorecard and our employee level scorecard, where we feel comfortable, going to repeatedly and consistently.
The next thing you want to have is operating procedures. We all know this. You want to have your standard operating procedures, especially if you're in a startup phase or in a triage phase you want to figure out, how do I fire myself from each role?
And the only way you can do that, it's like a business owner where you start a business. You have to think I'm working 6 jobs right now. How do I fire myself from each job? And the only way you can do that is, making sure you have strong standard operating procedures, so that no matter what the next team next person can pick up and run the play. So I'm a big fan of doing that. I tell my teams all the time. Whenever I I have a new team.
our goal is to ensure the next generation. Has it easier than what we have today. So let's document everything we're doing along the way.
All right, let's get into a little bit more fun stuff. So mastering performance. So this is where a little bit of my philosophy kicks in.
and I truly believe that we, as leaders, especially as you get more senior, you wanna be careful to not step on the toes of the other leaders that are under you. And the reason why is because it's a waste of effort and focus. So you wanna identify what is my oversight period and what is my ownership period?
And this is my personal philosophy, so if you don't agree with it, I would love for you to challenge it. Now give me your opinion. But I look at it this way. My team manager, if you call them supervisor team managers, whatever it may be.
I view it as they truly own the week. They wanna have great days. So really, what they're looking at is week over week performance. Are we performing how we need to perform? And they do that by managing to the day. Now the next level up is gonna be the director. The director wants to make sure the the week is whit is great, but your director should not necessarily be in the weeds every single day. You want your managers to be able to own that
in that process, because ownership goes a long way. When you truly own something, you treat it a lot differently versus when you're renting it. So it's the same mindset. But they also wanna have a great month, whereas your Vp plus that's really what you wanna have great months

and it and the reason why is because you own the quarter we all know we're gonna be sitting in a Qbr. Having to answer to what happened. And really, you wanna look at how it's trending over time, whereas your manager isn't looking at. 2 months ago your manager, just looking at how did yesterday go? How's next week trending you wanna be looking at that entire quarter now? It doesn't mean that as a a, a, an executive, you're not gonna actually go and see if the week is great. Going to the day is great.
It just means that your ownership and your oversights in 2 different layers. So I like to set that up and set that expectation up with my leaders up front.
Does anyone want to challenge that? Thank you, Jeremy, I appreciate the the support.
So from there, what I say is, okay. Now we need coaching benchmarks.
What are those coaching benchmarks look like? So that we're developing these employees.
And really you can structure this in any way you want. I want to. I won't go into the weeds. But really, what you want to go back to is, as I mentioned earlier.
we're not necessarily looking for individuals to perform, and have the lowest or the highest of anything. We want to look for the outliers who is performing too well, and who's performing too poorly. And how do I make sure I'm getting everyone towards the mean of the Median?
So I'm gonna be looking at those daily performance outliers as a manager who didn't perform as well yesterday. What can we do differently to data to improve them? Then we wanna have weekly performance reviews in support. Your performance should never be a surprise
like I mentioned earlier. This is one industry where I was able to grow because my development was consistent, and I knew where I stood so that a weekly performance review is gonna be something that managers are staying on top of with their employees with coaching, but also me directors and Vps will be having conversations on a weekly basis to see how things are going as well. So we can have that queue level check in as well as that agent level check in then, of course, your monthly performance review that, Mbr.
How do we do at an agent, level manager, level queue level? I wanna be able to see all that to make sure we're trending in the right direction and really hone in on those areas that we're struggling. Then, of course, we have the annual performance appraisal, and at that point, like I mentioned, no employee should walk into that surprise, because in support, your your performance is very black and white, and of course you can always add, in a a sense of
a sense of, you know, manager discretion, to be able to identify other elements like culture, fit and doing work outside of scope.
But those are your benchmarks. Typically. And then I like to have calibration forms. Now, where are we actually meeting? Where? Where are we connecting? So you wanna have that team performance meeting, that where your managers are getting with those agents on a regular basis and talking about the overall department. What's going on? Any key changes your audience may. Maybe the directors, you wanna make sure they're getting that information on how agents are performing.
Then you want to have your manager performance, which is really your directors and workforce management reading out to your directors or your Vps, or even the managers, and saying, Here's how we're performing overall as a queue as a team, not individually.
And then, of course, you wanna have quality. This is gonna be important because I have a big believer that you want your operations management team and the meetings with quality. You want them also calibrating the scoring tickets as well. So even if you get to the place where you

have a quality team, make sure that your managers are still a part of a quality process. Because what's gonna happen is as they're calibrating with the quality assurance team, they're gonna understand how to coach effectively to to actually meet quality standards, so you don't want them to go away
far from it. But you all want to stay on top of that.
and then you have your monthly performance reading meeting, as I mentioned, A. Qbr. Based on team performance. And then, of course, you also want to have a queue performance meeting where I want to see how the team is doing. But I also want to see just how is the queue doing? And I want to be able to look at multiple queues. Maybe we have an e-comm, and we have a hardware team. I want to see how they're all measuring out. So these are just examples of how you can split these conversations so that you can have the most effective dialogue with your teams.
Any thoughts or feedback here before I move on
now, right?
So this is what will make or break your group, and I'll stop here and kind of speak a little bit to this.
You can
have the best productivity.
the best attendance, the best quality scores. But if you don't have the right head, count for your staffing, it can all go in the wrong direction.
And what ends up happening as as you fall behind on head count, it almost becomes like a snowball because your employees, your customers, are upset because it's taking a long time to service them. Your employees are exhausted because they're working contacts back to back. and it starts to lead to attrition agents are saying. You know what I'm tired of dealing with back to back work and Avery and your customers. I'm gonna find a job elsewhere which puts you even further in the whole. So as you're hiring to make up your deficit, you're gonna be further in that hole. So it's so important that we do a great job capacity planning. And this is an example of it. It's ugly, it's big. So I'm not
opponents much on it. But you really wanna have a capacity plan and a strong workforce management team that's looking at it week over week. And you're calibrating with week over week and keeping an eye on trends that to say, Okay, here's where our volumes going. But also, what is our attrition trend looking like, you know? Are we losing more people than we anticipate. Do we need to cross train more people? Do we need to transfer people over because the last thing you wanna do is be in a position where you're understaffed
and trying to dig out of that hole for those of us who've been through it. If you've been through it in the chat to say I have. That's me. You know what it's like in that environment and it and to me it it can be a frustrating experience. And it could take a few months to get out of it, because your hiring pipeline may take several weeks of lead time for recruiting, and then to the interview process and then the actual onboarding process. So it could be 2 months before you actually get resources out. So you wanna make sure your workforce management team is doing a great job.
Yeah. So Wfm stands for workforce management.
Thank you for the quest question, Veronica.
yeah, so.

And and I think it's Dame, please keep me honest interested to know what tooling tech stack you use to support effective capacity planning. So this is a good. This is a good question. I'm gonna be honest.
I've
led workforce management teams. For over 10 years I've worked with them and I've been in this space for 17 years when it comes to capacity planning. The number one best tool to use is still excel, or Google sheets, which is sad. There's not really a platform out there today. That's doing a great job of actually building a tool for capacity planning specifically to the support centers. What you'll find is great tools for scheduling great tools, for forecasting great tools for real-time analytics. But there's still a gap for capacity planning.
So what I say is, ultimately you wanna make sure you have. You have the other tools that make it easy for you to build this file together. Whether it's a simplified workforce tool that allows you to export information. You wanna be able to have an easy hr tool, so you can know their time and availability as far as time off. But really, unfortunately, we're still. We're still waiting for that great tool to come out. If anybody's looking to have a startup.
That's a good place to put your dollars
all right.
So let's talk about curating an innovation center.
So
when I think of an innovation center, I think of 2 different areas or a couple of different areas. But I think of agent progress. Now. We want to innovate.
We have them in their roles. We have them doing what they need to do as far as their day to day responsibilities. But now we wanna be able to try new things. So I'm a big fan of pilot teams, because this is maybe where you start to specialize where, let's say, your support center. You're having everyone handle everything. But you're realizing you have a new product line or a new customer segment that needs an extra touch. So maybe you need a white glove
treatment team. So you may want to pilot an enterprise support or premium support type of team. Or maybe you wanna pull out and have a networking team that's separate. This is a great opportunity for you to pull some of your top performers into a pilot groups where they can start being a part of it, because I truly believe that that growth and development is extremely inspiring to your employees. And they're gonna wanna work a little bit harder for you.
So it it can do something that it it can create something that's more effective for your business. But also, when you're piloting, you almost have free rain and try something new. You're not confined to a box of the box you created during your master phase, you can set up, start to step out of the box here and find something new.
The next thing I love to do with employees is apprenticeship programs. So I truly believe the best employees to hire for any role in your organization are the cut employees who talk to your customers every day.
So what we do is especially if you're in an environment where you just don't have a lot of growth right now. Maybe you're steady state. But you have employees who are looking for those growth opportunities. Launching an apprenticeship program is is key, because what will happen is you're allowing them to rotate with other teams within your organization or outside of your organization. So I may have someone go helps to suit solutions, engineering or the sales team, or sit with engineering or Csm.

and what they're doing is they're able to learn that environment. What's going on there. What you'll notice. That also happens as a byproduct is that those teams start to ask, though your team questions and learn a little bit more about support may start feeling a little bit more empathy towards. Oh, if we did this a little bit better, we could actually have some improvement. This also works well as right alongs. We do reverse right alongs and have other departments do right along with your teams.

But giving your teams these opportunities is critical. It also creates bench strength across the organization. Now they've learned a little bit of work in other areas. You now have some bench strength.

I'll stop here. Has anybody experienced anything with pilot teams or apprenticeship programs.

I I can speak to that a little bit. We have a mentorship program that. The support team is often very big actors in, and it's kind of a blessing and a curse where it's great for the employees, because they learn amazing things and end up, you know, positive attrition to other teams in the company, but that contributes to the deficit on the support team. But we've always highlighted, you know. You keep that talent in wave. You bring that customer focus

employee to other teams within the company, and it actually persists quite, quite well. But it's it's a great way to invest in your employees and and their career and see that benefit elsewhere. But you have to really make sure you've got that planning and process done effectively to proactively account for the attrition that that's going to drive.

Absolutely. And I and I love that. You said that, too, because even outside of just just the attrition, there's a cost associated right? You're you're, you're baking and shrinkage and shrinkage is essentially the the percentage of time that they're not in a productive state. So we actually do that in our budget in my budget, I actually have line items to say, if I want my shrink to be 35%, 40%,

how do I carve out a percentage of that for these apprenticeship programs. And that also would dictate how many agents can do it. At the same time, the same with pilot programs. You're taking resources from one area and moving into a different area. So you wanna make sure you have it in your budget.

Thank you again, Angie.

So the other place is tooling and systems. So one thing that I really lean towards is, for example, you may be at a place where you're doing everything out of spreadsheets. As I mentioned earlier. You're doing everything.

Now you start to say my center is evolving. I want to start getting some either better tools or actual tools for efficiency. So you can start to say, let me actually get a workforce management tool and spend a little bit money to get that because there's gonna be an roi there. So you wanna be able to calculate that and no bias leading towards this tool, we will get X percentage more efficient which could reduce X amount of fte in my cost.

But it makes your life in your world much easier. You'll be able to do scheduling, staffing, reporting real time analytics all in one consistent dashboard, and your managers will have access to it as well, and be able to coach and develop out of it.

The other example would be a quality assurance tool, you know. You wanna pull that out of spreadsheets. And now start saying, how do we get a tool that actually connects with our Csat scores as well. And now you're having a more comprehensive analysis there, and you're doing a better job. But you can do this with anything right? Anything in your department. How do you

bring in better tools and better systems? How do I have a better learning management system platform and go from
us doing all in person trainings to now we can do self pace trainings that maybe are more efficient and cut down cost. But it's really about identifying what tools and systems work best for your environment. And how do we get them out of a manual space into a more automated space
or sophisticated space.
So now we'll optimize for scalability. And this is, we're gonna dive into a lot of things that we've talked about earlier. You know one of the big things that we all get pressured on at some point. A support system is outsourcing. If you're not doing it today, you probably will do it one day.
but the key is that, you know outsourcing allows for you to essentially duplicate your center. You're able to duplicate your center, and either a low cost and a lower cost environment or an environment that gives you more resources and more assets that you normally would have access to. I've led centers in certain markets where
we maybe we didn't need to outsource from a cost saving standpoint, but because the market we were located in the talent pipeline was so low it was better for us to go to a partner and versus standing up our own business and that new Geo. So there's different reasons of why you would do it. But the benefits of of course, reducing your cost per ticket. We talked about that earlier. This is gonna be one of the number. One things you wanna talk to your board about is reducing that cost per ticket.
But what I love about it is, it also creates that champion challenger mindset where you're now able to see. Okay, can my team do a little bit better? You know, here's what our productivity target is now now with the partner on. They're exceeding it by, you know. 10 points. Can we match that? So you start to have iron sharpen iron? But even they have a lot of great techniques on how to actually support the customer a little bit better, because
when you're dealing with an outsourcer, they're servicing 50 to a hundred other clients. They're able to see the industry and best practices across the board. So you get to pick their brain for some of those things as well.
Things like after hour support, you know. Do you wanna put yourselves in a position where your team can now cover more hours the day, and the last benefit is really international growth readiness, you know, if you find yourself saying you know what we wanna be able to grow in Europe, or whatever it may be. But you don't necessarily wanna open a hub there they get you ready for that as well. So there's some serious benefits, not just on the cost side, but also the experience side.
But what I always say is, there's some key requirements
before you try to outsource. You really wanna make sure you have your well defined sops.
And as I mentioned, you want to be able to fire yourself. It's the same thing with your agents.
How do they hand this off? Hand off the baton? Because the number one reason
why support centers when they outsource fail is because
you or us, as the client did not better prepare our outsourcer. We didn't provide them with the proper sops or training materials, because we were a little bit too early in doing it. So you really wanna double down on getting that done as much as possible before you roll out to an outsourcer? You're not gonna be in a perfect place. Nothing's ever perfect. But you just wanna

make sure you have a little bit more ironed out you also wanna have a living knowledge base. You know some of my centers that I've led my partners.
They would have not necessarily be able to depend on our knowledge base because we just didn't have enough content there. And if you're not familiar with the knowledge base, it's essentially a platform where we have all the help tools. Here's how you resolve these issues, you can look it up sometime, is not as comprehensive as it needs to be. And now those employees are having to learn from other employees, or learn from secondhand experience when they're troubleshooting.
also big for me. Top of my list is, you know, you have to be have time allocated on the ground. Have it in your budget to be there. Be present, because if you don't inspect what you inspect.
it will go the wrong direction, and there's nothing like having that relationship and being there on a regular basis, I personally go to my my outsource there every quarter, every quarter. I'm there. I'm there on site for our Qbr. But also having that presence there makes as a priority, especially with us. Being a smaller client, I wanna make sure that we're at least having facetime the team, and they're able to connect to our company culture.
And of course.
last but not least, accurate forecasting when you're dealing with the partner. You're gonna be contractually obligated to give them a certain amount of hours in a forecast each month. So you wanna make sure that you're ready for that. You're actually giving them a accurate information so that they're set up for success as well. So I'll pause here. Any. Does anyone have any feedback about? Maybe an outsource experience that didn't go well for them, or one that went really well, and a great tip for how they were able to execute.
I guess not.
I'll I'll jump in. No one else has one.
I don't wanna keep jumping in, but if there's but I think it's a good conversation.
Yeah, please.
So our outsource relationship at toast started
pretty rocky.
and part of that was we.
It was kind of a covid situation. Where, you know, we really accelerated moving to overseas partners due to covid but I think the key the thing that we missed was just
taking it slowly, right, you know, like learn iterate. Take it slow. You know. Get the right boots like you, said Shawn. Get like the people on the ground doing, you know, training the new partners. You know, get those relationships started early. We. We went into it quick. And without that much facetime given that it was Covid, and that was it was. It was really rocky for you know, for the beginning. because of that. So my advice would just be if it's new.
You know, just take it, take it very slow and methodical.
Thank you. Well, said
Dave says we had a bad experience previously, using a non vetted third party. We didn't do background checks. However, we outsourced tier one to Ukraine after the war the support was amazing, and we were supporting them in a time of prices. Our customers rate these guys very highly. That's outstanding.
I'm a big fan of the fact of what outsourcing can do, how it can create middle classes across the world. I I'm just a big fan of it. You know, when you get boots in the ground, and you see the true

experience, you see what true poverty is, but the talent is there, the talent is there in these regions, so how can we go back and support them?

but at the same time your Rfp process. You want to be airtight, you know. A lot of times we will go to these conferences and we'll meet these great outsourcing and build relationships. And you think this is who I want to go with, and to be honest. And my most recent Rfp

the outsource that I thought I was gonna go with the reason why I sent the Rfp. We did not go with them so sadly but surely and and ideally, I wanted our center to be in Jamaica, and unfortunately it was not the right environment. So I don't get that trip 4 times a year but going to the Rfp. And really, truly vetting them out. Let us know we made the right decision on where we landed

alright. So the next one is technology.

This is one of the top of mind for a lot of folks. I'm a big fan of workflow optimization. So if you have any tasks where individuals are doing a lot of manual work trying to get resources in the right environments. There's great tools out there. One is called Intradium. It's a great platform that I launched when I was at Comcast so definitely look into it, it cut, can cut out your your costs at a tremendous rate. But essentially what it does is it takes

a lot of the tasks of your manager, your training department and your workforce management team, and it can put it in a way where it's all a built into work in a workflow where it's all automated and it can a identify. For example, if an agent needs to do training, you say we need to get this compliance training done for the end of the month.

The challenge we have is that whenever you have that compliance training, you have to get through 300 agents, and you know someone's gonna call out of work and gonna have to reschedule them manually, or they're gonna go over on a call or over on a chat. So it can be it that that 300 agents in one month could take you 60 days to get through because of all the rescheduling. Well, what Intra will do is you can build a workflow where it'll say

I'm gonna identify. I want you to identify periods and time based on what we have availability, where volume slows down. And here are the list of agents I want you to push this training to, and what it'll do is it'll automatically look at your rules that you wrote, and it'll say, Hey, John, I'm gonna go ahead and pause. Your calls from coming in, it'll automatically flip their state and let them know it's time for you to complete your training. They'll click the start button. They'll go ahead and start working it.

and then, once they're done working, they'll wrap it up and get right back to work, and instead of it being scheduled on their schedule proactively, it'll do it retroactively. So now it schedules the exact amount of time they were in that state when they were on that state, but it allows you to cut out all of that back and forth, work and cut down some labor cost as well

so definitely check out intra. DM,

the other one is artificial intelligence. AI is everything right now. We went with the platform. We had an Rfp last year. We were looking at multiple AI platforms, and for me. It comes down to a couple of different things.

You wanna use a platform that can become intuitive you wanna use a platform. That is easy that that's easy to build upon and repeat, but you also wanna make sure it can touch as many channels as possible. The partner we chose. They were the they're called natomi. So if you're interested, they're called neat, I guess

NETO. MI. We chose them because they were the only ones at the time who could also do AI for for email as well. So we were able to not only have automated responses for chats, but also for email. And what we learned is that when it comes to AI
for the most part, when you're hearing AI in the support world, you're not talking artificial intelligence. You're talking automated intelligence. So what's about what you feed it? So it depending on how many articles and how many knowledge base items you have will determine how intelligent the AI is. The more complex your support center, the more difficult it is gonna be for it to be powered. So you wanna be careful with that as well and understand, okay.
I bought this AI tool. But it's not doing much. Well, it's because maybe the type of system you have is just more complex. So, for example, in my environment, our AI works far better for our Ecom platform, because it's more consistent, and how we resolve our issues, whereas with our point of sale platform, it's a bit more difficult because our point of sales very customizable. So a problem could be made based on a multitude of reasons.
So you wanna be able to identify what type of AI tool is right for you? One thing that we did was we over budget we overestimated. We thought we were being conservative as far as our ability to launch on a specific date with our tool and also our ability to deflect as much volume as we thought we would. We were off the off the mark by 6 months for email. We were off the mark from our escalation. I'm sorry from our deflection rate by about 75%.
Now, we're blowing out our goals a year later, but it took time to get there, and what we learned was that we needed to sit down in the same way. We we took advantage of prepping for our outsourcer. We need to prep for our AI as well. Let's build that library and understand what it needs to be intelligent.
there, could they continue to get better and improve more. What I'm all we're also looking at now is that the AI tools are not just for your customers. They are for your employees as well. So what we're doing now is we're looking for tools that make it our employee. Experience and employee effort go down. We want it to be much better on employee effort. They're doing a lot less work because a lot of times the support system is, your employees are having to go to 4 or 5 different systems to get their job done.
If we can find a tool that can consolidate the answers in the workflow for them
automatically based on what it's seeing. That's the key. So AI is not just for your customers. It's also from for your employees.
Do you get good Roi from automated emails. What is the percentage of automatic resolution on email? What is C sat on AI handle emails? Yes. So we are for our emails. We're we budgeted. Originally, we thought we'd get about 30%.
We we finally launched that we got about 5% and we're 6 months late. We're now seeing almost 20%. So it's continuing to get better on email, we're seeing about 80% csat. We did not have that same experience with chat we first launched chat. We saw very low csats 40 50. It was very poor because we were just rolling out it out, and it just wasn't accurate. Yet now we're seeing about 85%
csat on our chat deflection. And I believe that's the same reason why email has gotten the benefit of having a higher csat because we launched it at a later date, where we already had a lot of the learnings on the chat end. But it is very, very effective.
I've done some extensive research on up AI tools. And my main thought is that they work up to a certain question complexity. Only

in my case, we we are too complex.
in my case, we
2 complex questions to get to Roi at this point. Yes, we were in the same boat. Where, to be honest, we actually pivoted. We were thinking, AI AI, AI! Our CEO tasked us. Go out there, find the best AI tool. And we ended up doing the research in the market and realized, AI is not gonna solve our problems.
AI is great for an e-commerce platform, a retail platform, a restaurant platform as far as just not necessarily the software behind it. Once you get into Sas. And this we started having honest conversations with some AI providers. They started letting us know Sas is a little bit more difficult, because there's so many different layers. Hardware is more difficult. There's so many layers. If you have a consistent, easy product like telecom, telecom is very easy. Cable companies very easy. They already know what all their area of error codes mean it's it's it's much more useful. When you start getting to a complex environment. And sas, it becomes difficult.
Absolutely. I agree with you as well, and where we actually evolve to, and we can keep having this conversation about AI as well. Was this place reducing volume?
We realized the people who were doing the best in the industry were not reducing their contact rate because of AI. They were reducing it with partnership, with with R&D. So what we essentially said was, okay.
what AI does is you have your top of the funnel volume
volumes coming in. That's that's a hundred percent of your volume. Then it's gonna deflect a percentage of that volume as it comes in. And you're left with 80% to 60% of that volume to work right
when you work with R&D, and essentially, what you're doing is your top line, your 100 drops down. So now I have a a smaller funnel at the top. So I'm not just looking at customers reaching out. I'm gonna stop them from reaching out completely. So what you want to do is essentially create a feedback loop with R&D, and what support can do is say.
how do we? How do we actually communicate the best areas to improve. So, for example, leg one volume, interest of support queue. And we work that volume and leg 2, we're gonna actually the supports gonna actually analyze that create a memo and inform R&D, the best product focus areas. And say, if we focus on these 2 areas, it'll cut out 16% of volume, and you'll naturally see an uptick in customer experience.
R&D receive that that product brief. And they'll implement that change. And it's a cycle until you continue to eat that volume and volume. Now.
for Zack says we implemented Fin by intercom. Our support function function was mostly handling our worst customers, anyway, and we were close to appreciating it entirely, but went with an AI assisted Bot instead.
Simply simple queries simply queries our knowledge base for answers. 6 months in Csat has stayed roughly the same. But 65% of the inquiries are getting handled by the bot. That's incredible. That's incredible.
We. We have a small consumer base. About 10% of our volume coming in is in consumers. And we were able to deflect a lot of that bot that volume with the bot as well. There's certain areas of your business or contact types and classification reasons that will be able to deflect at a much higher rate. So the lowest hanging fruit will be, what are these things that should be self service

to customers? What are these things that customers shouldn't be calling in for anyway, and really identifying those for the bot. And then
AI is handling those while you're working with product. I'm saying these are the bugs that keep happening on a regular basis, or the product could be designed in a way where they wouldn't even have to contact us by making these changes. So it's really a 2 prong effect. You want to be focused on AI as well as have these R&D product briefs.
I'll pause here for any other feedback or questions about this process.
and while we're doing that I'll tell a little bit of a story. So step one in this process for us was we needed to improve our classification. So if you don't know what classification is.
every support contact that comes into your center is gonna be tagged to something. It may be printer issue. It may be. You know, label issue. Whatever it may be. You're gonna have different tags and different classifications. We wanted ours to be more accurate, the more accurate you could make your classifications, and the more granular you can make them, the better. So first phase, the project was focus on classification. First.
Once we get that configured from there, we'll know where our opportunities are, so that when we are receiving tickets, we can give a better diagnosis to product of where to focus.
From. There it comes down to training your employees. Here are the new classifications. And here's how you tag them, and here's why you tag them and make them a required field, so they can't bypass that process that way. You're getting their accurate information. Then it makes it easy for you to do your product briefs. We we were, gonna we were going back and forth on who in our department would write the product briefs. We looked at our management team. But we decided we're actually gonna take
one of our principal support engineers because they already work pretty closely with R&D. This is an opportunity where they have a more holistic view to help us write those. So it just built that relationship a little bit stronger, and by us, owning the breeze versus R. And D doing it, we're making sure that the content gets out there and is actioned upon.
Right
final thoughts.
So I wanna leave some takeaways for keys to success. So number one from day one start thinking about how you can de risk your team for being downsized unexpectedly. This is something. I tell all my leaders whenever I join an organization. The first thing I'm thinking is.
ha it not saying the company is going in a downward spiral. But how do I prevent that? How do I make sure that we're not looked at as a department for a risk for having to downsize and and like, I said, you wanna think about the first thing is, what is my cost per ticket. When I walk into this place, I wanna look at my cost. And I wanna look at my customer experience. Those are the 2 areas that if I can improve those it it, the board will be more satisfied with what we're providing to the company, and we'll become an asset.
Share your cost per ticket with R&D as early as partner, I mean, as early as possible, partner with them. What we do now in our department, and our company is R. And D. Is actually keeping a doubt. Tracking how expensive their incidents and outages are to my department.
So we're now able to say, this product bug, not being fixed, cost the company this much. I wish we did it 2 years ago, right? Whereas we're just learning that these are the things that we should have done earlier on, because now they're more bought and with us, and they also own the

contact rate metric with us instead of only support looking at their metric. My Vp of product, she's responsible for having the answer as to why our contact rate is
or is not improving. So we're really partners in this process.
And then the last thing is prioritize investing in your knowledge base for enable enablement. The way you're gonna train your agents the way you're gonna train your AI is all gonna be based on your knowledge base. So you wanna have that readily, readily available. And remember that when agents are in training for 2 to 6 weeks.
the thing about it is they're not gonna remember all that. It's just, not realistic, whereas a knowledge base is a place for them to go and be able to fall back on and educate yours themselves. But your customers can also access the same information if you make it a help center
so traps to avoid
not setting your feet before running your race. I tell my team all the time. It's not just about go. Even your top athletes know it's ready set go. So we wanna make sure that even when everything's on fire. Get that foundation locked in place that way. You have momentum as you scale
also, the other risk is oversegmenting into specialized groups too soon.
You don't wanna get to a place where you have a small team of, let's say, 20 reps. And now you're bringing them into smaller groups because it gets really inefficient, and the cost goes up. So you wanna know, when it's time to specialize and when it's not time to specialize. The last thing is overloading your staff ratios to reduce cost wanna leverage you can always pull. Say, I wanna change my manager ratio. Maybe I can do 20 to one manager. 20 reps to one manager, and once you do that, you start to send a message to your team of
for one. We don't care about your development because your leader barely has any facetime with you because they're leading 20 other people. So you really want to find that right ratio for your business, but not necessarily break the bank there because your leaders are going to be that. Stop gap. Your leaders are gonna also be that communication of here's what leadership the leadership team is saying, here's why we're making these changes. If that leadership team feels burnt out and undervalued there, it's gonna you're not really gonna have a great voice to your front line.
and the last thing is under prioritizing the storytelling of your department's performance when you're running a support team.
Typically, if you're doing well, no one thinks about your knows about you. Right? So it's your responsibility to continue to tell that positive story. When things are going wrong you, you could have a 90% csat.
But the key is that 10% of negativity is what the entire company will hear. So you wanna make sure you're also putting out there the positive message because we tend to hone in on solving problems versus celebrating our wind. So you wanna make sure that you're telling that story. You're celebrating your team. So those are my keys in my traps. I'll stop here. Any questions. Are you additional feedback as well?
Thank you.
I. I have a question if we have a moment, I noticed a number of folks put the startup stage. That's the stage. We're at as well, and I really like your slide with the

grid of the different channels and their ranking. And I kinda interpreted from that a suggested order. If you're going from total startup, what's the first step sounded like, probably email until you have the right volume and then maybe chat. But I'd love to hear you talk a little bit more about going from 0 to one.
Yeah, you know, it's to your point. Yes, we actually started with email. We did email prior to us rolling out chat and phone, which is why, unfortunately, still, a lot of our customers don't even know we have a phone number because they got so accustomed to our email but it just made the most sense for our business at that time. Really, when you're going from 0 to one.
What I love about that stage is that
early on. You want as many people involved with support as possible. If you're having it worked by 2 or 3 people. At a startup stage, I think that's not enough. Because even if if the other team members are jumping in once or twice a week, you really want them involved in understanding what's going on. So I would actually roll out a Csat survey as well. Because, let's say, your partners and other departments just don't have the time.
What you could say is, let's roll out a customer satisfaction survey. And what we're gonna commit to is every leader in this company is gonna call a detractor. So whenever we get a detractor, we each have to call at least once a month. And now we're getting that feedback, because that's gonna be informative to everybody, because now we know how to work on fixing the product and making the everything a bit more better for our customers and also for our support team, so there's a couple of tips I would do if I was very early on.
I think we have time for at least one more.
Yes, absolutely. Let's open the floor up. Anybody that would like to come off of mute. Please feel free.
Thank you so much. It was very insightful and useful.
Thank you. I appreciate it.
Hey, Shawn? I've got one question for you. Steve. Sorry I can't come on camera. Where do you see support? In 10 years time
she had a crystal ball.
Yes, I just have this conversation earlier this week or last week for one, I think you have a great picture. So thank you for being off camera like the suit. But honestly, 10 years.
Thanks.
10 years from now, I see support being much smaller, you know, in in my head. My job doesn't exist the way it is today. My team's job don't exist the way they do today. AI is growing at a rate, whereas today automated intelligence is what's needed for these complex environments.
But I do believe in 2 2 years time AI will be able to catch up. I think the key is gonna be. It's gonna become less about how do we? How much do we train and develop our agents? And more, how do we have our agents leverage these tools and provide the best human experience to our customers.
we know that the more that AI can solve these problems, we're also pumping the most complex tickets to your reps. So you have to think about it as a rep. When I was a rep for a few years. Getting the easy tickets were what helped me ride to the hard tickets, because I knew I'm gonna knock these ones out a little bit. It's a breather then. Now, I'm back to a really complex one. We're getting to a phase where everything's becoming complex. So when you start also thinking that as support leaders.

how do we make sure we're giving enough time away from the queues and budget for that. So these individuals have moments to recharge, to dip back in, because it is very. It's a very difficult job, the more complex. We're making it. So I do think that we're gonna evolve. I think training times are gonna drop dramatically because it's gonna become more about soft skills and more about, how do you leverage the knowledge base or the AI feeding you? The answer, but making sure that customer hears what they want to hear.
Awesome. Thanks.
Appreciate a day.
you know. Thank you, everyone. This has been phenomenal. I appreciate you taking the time. Like as I mentioned, I'm always excited to talk to Cx leaders. Thank you, Emmanuel, and the pavilion team. I look forward to seeing you all continue along your journey.
Thank you. Thank you, Shawn. This was truly fantastic. It's been a pleasure being here with you today. I hope to see you in another pavilion classroom again soon, and thank you for those of you that take your time out of your busy schedules. To be with us always a pleasure. Have a wonderful rest of your day and week ahead. Don't hesitate to reach out to us if we could help in any way. See you all next week. Same place same time for week. Number 6. Take care, everyone.
Thank you.
Goodbye.

Class 6
text
Hello! Hello! Welcome everyone!
Happy Tuesday! I cannot believe it's already been a week since we were together last time. Time flies.
Hi! Everyone welcome, welcome, wonderful state familiar faces
at this point, I think you all know, but I'd love to remind you if you are willing and able no pressure. Please feel free to turn your cameras on. We'd love to see your faces today and hear from you.
Welcome to week 6 of Cco. Of school. My name is Alison. I am happy to help in any way that I can. Please feel free to send me a message in the Zoom chat today. If I could be of assistance.
All right. Welcome to those of you that are just hopping on. We've got a great one for you. I am very thrilled. We're going to have a conversation today on customer led growth. The driver of Post Sale revenue and our instructor today is Sydney Sydney is the Svp of customer success at Catalyst.
So, without further ado, welcome, Sydney, thank you for being with us. I'll pass it right over to you.
Amazing. Thank you. I really appreciate the opportunity. Awesome to see some familiar faces and names. So let's just get started. Let me fire up the screen here. One sec. Appreciate everyone taking time out of their day to join.
So, as Alison mentioned today, we are going to talk about a hot topic and exciting topic around customer led growth and specifically customer led growth being a critical strategy in driving post sale revenue, something that has started to take more shape and form for us as Cs leaders in the Cs leadership space more and more over the last couple of years.

So before we get into all of the customer led growth Fund I will introduce myself. So I am Sidney Straighter. I am based in Ontario, Canada, small town called Renfrew. Big accomplishments. I am mom to Olivia, just coming off maternity leave. Actually, she's a 8 and a half month grown little gal. We had music class this morning. That's always a lot of fun and entertainment, and and also life partner to Nick. He has very much been a critical partner in the parenting game over the last 8 and a half months, thoroughly enjoyed our time together. Embarking on that new adventure. I am one of 7 kids. Those are all like biological siblings. It was chaos in our household operations at the Ying Yang, which is maybe why I landed in customer success in terms of repeatable process and an air towards operations. And when I am not being mom to Olivia, or and when I am being mom to Olivia. I absolutely love all things, activities, sports indoors outdoors. I like to be on the move.

So biggest accomplishments. As I mentioned, 2023 definitely becoming a mom. Olivia is a steady state of new adventures, new learnings, new challenges, and that is an incredibly fulfilling role to have. And also, you know, it was my first time professionally embarking on taking time away, and it was really important to me to challenge myself in terms of how I can set my team up for success, I think often

sometimes as leaders we take on so much weight and responsibility of oh, if I'm not there in the trenches day in and day out, if everything gonna fall flat and fall by the wayside or or not be as impactful as we could be, and I can tell you, the catalyst team thriving in my absence, which I absolutely loved to see. So that was really big accomplishment, making sure that I was setting them all up for success in my absence there and then. Biggest learning in 20

23, just a focus on what's within my control versus what's not? I think we've all been through a lot in tech, particularly over these last couple of years and anxieties, skyrocketing at various different times. But when I dialed it all into what can I control versus? What can I? Not? It very much helped me. Focus my time and attention and energy on things that I could move the needle on, and that made me feel accomplished and fulfilled and purposeful even in crazy times.

So see? Okay? So today, walking away from this class, we're successful. This is what we're going to be able to achieve together. So one understanding our role as Cs leaders in driving revenue growth.

articulating the meaning and championing of practice that we're gonna go deeper on called customer led growth, critical strategy and helping to retain and drive revenue growth from your existing customer base through the unification of all leaders and all employees across the company, identifying revenue streams available for growth. So how the heck? Do we even drive revenue growth from our amazing customers?

What are the right people and processes processes to make that happen? And implementing value creation, something that is mission critical in order to be able to attain those revenue goals. And a big, big, big component of all of this is how the heck do you drive organizational change? This adoption of this practice and the strategy while mission critical and highly impactful.

It's hard to drive change in an organization, especially in an environment where there's already been so much change over consecutive years, and a lot of employees and team members are dealing with burnouts, probably ourselves included, so very excited to talk about some strategies that we can achieve there.

All right. So this may look familiar to Americans. But to me as a Canadian this is my adventure into whole foods looking for water.
And as a Canadian I'm like, good God! There are so many different options available to me that I find myself staring at this wall for 10 min, having not actually concluded getting a glass of water or drink of water bottle of water. Because there's so much variety. And when I think about this, this also reminds me of customer success in a lot of ways. It's taken so many different shapes, forms.
responsibilities, accountabilities, and oftentimes I know for myself, as a Cs leader, it's left me struggling to communicate the value of the team, the impact why we shouldn't cut team members, why we need to invest in more team members. And because of this kind of unknown identity or this identity that doesn't really have a lot of like concreteness and kind of history behind it. It can become a little overwhelming.
The good news, I think, for a lot of us is that these last couple of years in tech well, they've been incredibly hard. They've put more and more emphasis and criticality on customer success teams what their role and shape looks like from a revenue perspective. And I think, as we all know, the more we can tie ourselves directly to revenue the more justifiable the investment in customer success is and that
that goes a long way in helping us to be able to build and evolve our teams, to be able to drive the outcomes and impact in the organization that I know we want. So this year is really just a depiction of the shift in the industry back, you know. Couple of years ago it was spend spend, you know, burn the capital to grow faster, faster. And we've seen a huge shift on profitability and the focus of being very intentional about that
spend and in doing so, it's put a huge emphasis on organizations to focus on retaining the customers that they have, and driving growth and expansion from those customers as well.
The benefit to all of us is, we find ourselves right in the hot seat of that responsibility. And so it's an amazing opportunity for us to jump on this time to say, we, as Cs leaders, have the ability to really lean in and drive this organizational change that's going to help, you know, navigate the rough waters that have been tech over the last couple of years and amplify the next stages of growth
within these companies. So I'd love to take a moment for ourselves. Just get a little pulse check from the crew in terms of revenue responsibilities today. So I know that, like I said, Cs takes so many different shapes, flavors, forms for all of us. So if you wouldn't mind, we've got 52 folks, 53 participants here to jump on into the poll that just popped up. Thanks.
Alison, and share with us what your team is presently responsible for when it comes to revenue.
Perfect. I will give everyone just a few more seconds. The results are flying in quickly.
Give you about 5 more seconds. Everyone. Thank you for your participation.
All right, let's see what we've got.
Alright. So big shift, I would say, because if I were to go back like 5 years ago, we probably should done that in the poll to. That'd be a fun one which is like 5 years ago. What was everyone's responsibility I don't suspect, feel free to throw in the chat if you fundamentally disagree that we would see 52% of folks being both responsible for securing renewals and identifying growth opportunities also super interesting to see that 29
are at securing renewals and closing growth opportunities. So we have already seen, I think, a big shift across the industry and customer success of taking more and more responsibility, as it

relates to direct correlation to revenue on the renewal and growth side. So thank you everyone for contributing there. And
another poll
future role, let's say 10 years out, just to give us a lot of runway here. Where do you foresee your responsibilities from a revenue perspective
really curious to see that, like 60 to 70%,
I suspect they're still going to be on the revenue growth. But for the other 30%. Curious to see. If you anticipate, you'll be taking on more and more.
Alright! Give you all another 10 s.
I think we got a clear leader on this one.
That's awesome.
All right. Let's do it. Thank you all.
Alright. So, seeing a more of a shift to renewal and closing growth opportunities which is super interesting. And yeah, very, very little in terms of no no revenue responsibilities so awesome to see that the shift very much aligns with where we're headed presentation cause that could have been a disaster if we're not so great to see, and we'll keep this in mind as part of the breakout discussions as well to make sure that
as we really double down on where we can, you know, be of support to one another in the community, sharing past experiences and setting everyone up for success, taking on more and more of these responsibilities that we are sharing all that we have learned from those who are in those shoes today and collaborating with one another.
So knowing that we've got a good representation of folks who have this revenue responsibility today.
5, 10 years out, even more of us going to take on or anticipate taking on this responsibility. The question is, where the heck do we go from here?
So one of my favorite strategies, and what I fundamentally believe is going to be at the core of an organization's success forward. And if you look at many organizations who have been very successful. Historically, I'd argue that they have exemplified customer led growth
properties. This concept of customer led growth is an organizational belief, and most importantly, the operational discipline which is like the executional, how whereby customers are at the core of the organization and the strategy around, how you retain and grow revenue. And I think we've all worked for organizations that are like customer first on the values, you know, list. But it really has not necessarily been
and embodied from like a fundamental belief and an operational discipline. And I'm really excited to get into some of the tactics of what that looks like in practice, because that's where I think the impact can really be driven.
The other thing to note is what customer led growth is not. And I'm sure it resonates with Cs leaders here, which is, it's not the sole responsibility of customer success. I think, oftentimes talking to peers in the industry. We feel like we're sitting in the hot seat of like retentions, poor like what is customer success not doing? And it's like they need to be better. They need to be better. And it's not about deflecting accountability, because I absolutely think there are critical things
customer success can be doing to drive retention to drive revenue growth. But it truly is a cross functional alignment, opportunity in order to maximize revenue, retention, and growth. And if you

do not have the cross, functional alignment and collaboration between marketing and sales. Customer success, product engineering. The system is going to break down.
So it is about ensuring that end to end the entire customer journey from product development through to selling and everything in between. That there is this adoption of these disciplines oriented around customers and specifically mindset around? How do we maximize revenue from the retention of those customers and their growth, so that at its core is what customer led growth is.
I will give you 20 s to just digest the stats on this slide. What's really, really powerful is just from an efficiency perspective, which is what we know is so critical in organizations today, when we think about the cost to a actually operate a business is how much more efficient dollar for dollar spend it is to drive growth
from your customers using a customer like growth strategy than it is to go old school mentality and just dump a crap load of money into the marketing funnel. So I'll let you just like read the stats here to take that all in
awesome. You'll have access to this tactic so props to catalyst really loved this slide. I think it's really, really impactful when you have the data and the numbers behind it to challenge ourselves in terms of okay, dollar for dollar spend? Where can we invest this in our organization? Where are we going to be able to maximize our returns and operating under a customer led growth strategy with a complete emphasis on the customer
selling and building a product aligned to the value that they're looking to extract, marketing and selling against that and customer success, amplifying their adoption to drive that growth from a revenue perspective.
clutch
alright.
You just asked a question about that sign, Sidney? I.
What up, Jan? How are you?
Nice to see you. Just just a couple of things about about that last slide. If if it's okay, so when you say, 25 X. Are you just saying that that's
what is
over. What like in terms of.
Yeah. So if you're to look at the cost of investing, to acquire a new company versus the cost to actually retain that customer. It is 25% less expensive
to like 25 x, less expensive to be able to retain them than it is to continue to acquire, acquire, acquire.
I just.
It's got.
And check, like what the X's were of.
Yeah. Thanks.
Okay. And then when you say.
Fire!
Catalyst pulled this together. Was it based upon what they saw for their own customers? Or where are they getting the demo.
No, this was industry data. Yeah.
Industry, data okay.

Yeah, the industry get it? Yeah, not specific to the customer base.
Alright! Thanks.
Yeah, great questions.
Awesome.
Cool. So where does this put us? It puts customer success right square in the middle of the organization. And the way that I think of customer success. I really see us as the nucleus of a company. Right? We sit on the data set. We sit in the center of the organization. We are kind of like the communication center, if you will to sales, to marketing, to product, to engineering, to design. And so we really have an incredible
opportunity to leverage our position to amplify that like strategy, the thinking, the operational disciplines around a customer led growth strategy. So we're gonna get into the specifics of what that looks like in practice. But
the nuts and bolts of it is, everyone is incredibly well positioned to drive an incredible impact in their organization through this strategy.
So before we jump on to the next section, I know Alison will just put a feeler out there if there's any questions, Jan. Love that you just like raised your hand jumped on in. That's awesome. We want this to be super collaborative with anyone, with everyone. So if anyone else has any questions before we move on, or thoughts feedback by all means chime in.
Yeah, please, if anybody'd like to come off of mute, please go ahead. We also had a question come through in the chat, too.
I'll come up. I'll come off of mute and ask my question in the chat. Hi, Sydney! Great stuff here and.
Thanks Charlie.
You mentioned operational discipline. I I'm sure you're going to get into it. But love, the comment, love the quote, love the kind of
let's let's leave be a little bit you know. Let's let's push people.
And I was just curious if you can expand upon what operational discipline means to you and and the go to market teams.
Yeah, it's a great question. So I think at the core. Starting with the leadership alignment around, what are we focused on? So what is our goal from a revenue perspective.
How do we get there? Focusing on the retention and growth of our customer base? And then the operational disciplines is really like, what are the processes that we need to be operating against across the organization to be able to attain those outputs and those goals? So if, for example, I'm thinking of one operational discipline that we had built out at a a prior company. It was around the ability
to have product actively involved
in customers on the front line. So an operational discipline we had is, let's put together a Beta program that is focused on revenue growth potential feature sets within our product and customer success was, you know.
operating under a process that was paired with product and engineer resources to come in and collaborate with customers on the frontlines around these product features. So historically.
we may have a problem where, like Cs is like elbows out, doesn't want to be engaging necessarily, or allowing product and engineers to engage with customers directly. There's a sensitivity. Oh, they're not gonna speak properly. They're gonna say something, get hung up.

We had an operational discipline. That was our defined process of training, enabling product engineering and Cs to bring Epd resources to the frontlines with our customers
to get feedback on specific aspects of our product that we're going to be. Try tied to revenue growth.
Alright! Good! Thank you.
Yeah, you're welcome. And there, that is like one of a whole lot of operational examples. So happy to chat through that from everywhere from like systems of like forecasting revenue risk prediction, turn reasons risk reasons. I mean, there's a lot of different operational processes there, Charlie, that we can look at that all tie into that bucket.
Okay. Thanks.
Awesome great question.
Alright. So Cs leaders, driving revenue through customer led growth. So in the chat I love to hear from everyone you know what are some of the sources in which you are driving revenue growth today?
Yep, love that upsells customer acquisition.
new products.
that
awesome. What up, Veronica? Great to see you.
Good to see you, too.
Amazing. Okay, cool.
So another one jump in there as I close the chat.
Yes, love a multi-year deal.
Amazing. Okay, love that. So I think we more or less covered the the basis here in terms of upsell cross selling from a new product line cross selling into different teams. You may have started with, like the customer success team, for example, but there's an opportunity to expand into their sales peers trueing up nothing better than seeing a customer come in with a contract, drive a strong adoption
in terms of how they're using your pre features and functionality and product itself, and seeing the true up and then from a services perspective as well.
being able to use that as a monetization opportunity. So thanks for everyone's contributions into the chat. When I think of you know, revenue leaders and some critical questions to ask ourselves in terms of how are we going to drive this revenue growth? The first question is, what are the streams available? But just using what everyone's contributed into the chat and what we have on the right hand side. What streams do you not have
available today? I think that's a really important question to ask. Ask yourself why and ask yourself.
would it be impactful if we introduced these revenue streams? At a prior company. I remember, you know, we really had to put our heads together as a collective Cs team to be like, where is there opportunity for us to drive revenue growth? And we honestly took this list on the right hand side and said, like, what do we have within our control today, based on our current pricing strata? Pricing structure based on our product offerings?
And then what do we not have as an offering, but we could introduce as a potential revenue stream, and then using that to then take it cross functionally to our partners in the organization, sales, marketing. Epd, and going. What does this look like for an organization for us? If we were

to introduce this new revenue stream, what would the investment be required, and what type of return on that investment could we extract? So I think
you know, what are the streams that you have available today, but also, importantly, what are the streams you don't have available from this list on the right, and what was contributed to in the chat? And is there an opportunity to introduce those?
I think the second piece and I saw this a lot, particularly as you know, the economy got very tough and you know people were struggling to how do we, you know, extend our cash runway, etc? There was just kind of this like, try and drive, you know, increase in revenue. But by doing that by, here's the same product. Just pay more for it, and obviously with a lot of customers that introduced a ton of
right and put even more pressure on the customer success team when they felt like they already were enduring a significant amount of pressure, just trying to retain the customers as is. And so what we always would go back to at catalyst specifically, was, what is the value that customer is getting from our product. And when we talk about other revenue streams that we want to introduce, it's not just about okay, great. Let's make more revenue from this avenue. It is, what is the value that we deliver our customers by introducing
said source and is that going to correlate to us, them being able to extract revenue growth from, because there's truly deeper value for the customer in it. So I think that that is really important, that when you're looking at revenue streams, you're asking yourself, you know, from the lens of the customer, what value are they going to be able to extract from this? And does it justify further investment on their end? And we covered Number 3 in terms of untapped revenue streams.
I see that there's some
things in the chat. Do we want to jump into a question here, Alison, or keep moving? I'll let you.
Absolutely. Let's take Alejandra. I see you have a question true up Colin, meaning right sizing contract licensing units.
I just just wanted to find out what you meant by true up.
So true up oftentimes this is an example. So let's say you have a product. Pricing model is 10 seats, and you don't have it, feature data, and all of a sudden adoption increases. They're using 15 of the 10 seats. You would true up on the 5 additional seats. Co-term to the end of your contract. To extract that additional revenue.
Yeah, yeah, okay.
Great question.
Jan, did I see another one come in the chat from you?
I just wasn't sure what Charlie was talking about, he was saying. Clg it. I wasn't sure if you were connecting it to Pl. I don't know. Maybe it's a sidebar.
No, it's a just wanted to to just about to to respond, Jan. But to me I think that that customer led growth needs to be tightly intertwined with the product.
and the product can really support the you know the different customer growth strategies. And that's what what I was W. Was excited at I mean, yeah, you've always had. We've always had pl, but sometimes you haven't had as tightly as much input, from the go to market teams for pl as
as I'd like. And I just you know, one of the things that excites me about the whole concept of customer led growth is to really help them. Have the product play a big part in that.

Yeah, Charlie, that's an awesome call. And I think a lot of leaders and Cs feel that way, too. Right? That they're maybe on like the downstream, you know, decisions of a Pl strategy versus at the core, driving it from a customer like growth strategy with a critical partner in product and engineering to be able to achieve that successfully. So I I definitely agree with your your sentiment there.
Awesome.
This one I will, I will admit to. So Sid, early on in her career, was very much the advocate of like yes, from a customer success, perspective. They should get free all the things, you know, because they're a great customer. We love them dearly. They're, you know, really, you know, using our product. Well, we want them to use it more. We want them to retain at the end of the day. But as I've evolved, as I've learned a little bit more about the
business, and you know, kind of matured from when I was like early days as a Csm to now having a more leadership responsibility and role, I've learned a lot more about the business at its core. And so my mentality has really evolved here. And I think this is a mentality that's required of all revenue leaders to really think about, like, what are the products and services that deliver value? And then how can we tie
monetary, you know, amount to it. To drive revenue growth through that stream. And a model that I've really enjoyed is the good, better, best model, which is, you get something that is, is really good, like as a foundational service experience, whether it's onboarding support, professional services, dedicated Csm. Or training. You get a taste of what that is but there is an amplified version
with higher value that comes with a cost associated with it. And so it doesn't mean that a customer who doesn't make that investment is screwed and is going to churn but it means that for customers who would benefit from the additional enhanced support premise for as an example or having a dedicated Csm. They are. They see the value in it, and they're willing to make that investment. And so you can use it as a revenue
stream. This also becomes highly impactful when you're working with your Cfo or finance leaders to justify additional investment in the head count and resources that you need when you have a monetary value of income that they are producing for the business, for each headcount that you are investing in so big advocate of looking at your customer success offerings as a whole and using that as a monetization strategy
rooted in the value that you deliver your customers there as well.
Alright. And then Charlie touched on this which I loved, which, you know, it really comes down to that product and engineering partnership. How are we going to enable them, with the right data, the right resource and understanding of our customers that allow them to ship solutions that address pains that have clear, quantifiable value. And then how do we align that
to what our marketing team and our sales team is communicating to the industry and to prospects in terms of the roi and the value that they're going to be able to obtain, and then in customer success. How do we connect the dots of a customer has bought our product, our service to be able to solve X pain point
here is how we are going to measure the adoption of our feature set to be able to ensure that that pain has been addressed and the Roi and the value has been obtained so that they are sticky. They're going to retain. And they're going to look to further double down on their investment in our product and our our partnership because of the value that they've been able to

extract. And so it's really critical to have what we called a catalyst which I love, where moments of impact, which is this?
What is the value that a customer is going to obtain, and we looked at it on a feature by feature basis. So, for example, if we looked at for those who are not familiar with catalyst customer success platform. And there was reporting structures. So let's just say, as a Cs leader, I need to come every Monday to my leadership team with a report on the risk profile of our entire customer base.
and we would look at that report, and that would be huge for me to be able to communicate to sales, to marketing, to product engineering. What are our customers who are at risk? And how can I have the ability to communicate to marketing, to sales, to product and engineering on areas they have within their control. To further reduce the risk. Perhaps we had some set expectations on the sales side, or, you know, product and engineering.
We had some product gaps where adoption of certain feature sets that we know if a customer adopted them were going to be incredibly sticky. It gave me as a leader a communication tool to be able to effectively communicate, you know, rooted in value for our customers with the eye towards retention and growth. By this unique, defined, like subset of impact moments, moments of impact that we had aligned on as a collective leadership team and then rallied the rest of the collective organization around.
So another critical part of a customer led growth strategy and the operations of it to charlie's question earlier is the team that you need? And I think what's really, really important here is that there is no one size fits all.
Every organization is at a different stage. How's the different structure? This isn't a cop out, but it is like a you have to kind of take a step back, assess your environment, assess the profile of your buyer or your marketing strategy, or like your pricing strategy, etc. Get to a bit of a framework on the next slide. But a team is going to be mission critical in your ability to operationalize that customer led growth strategy
and drive the revenue impact that you desire.
So in the past, I think there has been more so in the past, probably still, some present. Now a big mentality and customer success around. If Cs has revenue responsibility, it's going to fracture the relationship that they have with customers.
And there are a couple of last couple of giggles. Is that what I heard come through? But new leader, revenue leader mentality is that everyone plays a role in hy helping drive revenue growth for customers, and we'll speak to a couple of slides from now a little bit about the like leadership and mentorship change and mental shift for getting our teams to be there. But I think that's really mission critical is
for folks not to fear the responsibility and accountability of revenue. So no one size fits all very much going to be indicative of your size, company size, your product suite and a number of other factors. But here are some of the questions that I love to. Ask myself when I'm thinking about working in partnership with sales, for example, on what are the jobs to be done.
So really, just documenting, what are the jobs to be done? Very tactically speaking, in order for one to retain and expand revenue growth for a customer.
What are the skills required to successfully deliver each job? I think we have probably all faced the pressures of Hey, you need to hire Csms, and they need to be a Jack of all trades. And your Csm. Who's amazing at building that relationship is struggling on the commercials or vice versa.

And it's like we're looking for the unicorns right? And you may have one, a plus person on the team who can seem to do it all, and everyone wants that person to be, you know.
repeated a thousand times over. And it's just an unrealistic expectation. So it's really helpful from my experience to document, what are the skills that are required for each of the jobs to be done?
And then looking at? Okay, if we were to pull the jobs to be done together and look at the, you know, consistency and skills that are required. What would this look like in terms of shaping specific roles, responsibilities that allow us to successfully execute those jobs and deliver an amazing customer experience in the process.
So just a couple of questions for you to think through when it when and if you're in a position of, I need to look at my org the revenue org as a whole, and think about how we structure our team to maximize efficiency but also impact from a revenue growth perspective.
So mad props to Emmanuel Scala here on this framework. I won't go into the specifics here. This is another great one to just like, take a screenshot or come back to. But here are some really thoughtful ways to think through the different parameters that may influence. Whether you know
ownership from a revenue perspective is best suited to fall on sales or customer success based on the jobs to be done and based on the skills that are required. So I really like this model, and Emmanuel shared it with me, and I think it gives like a really good kind of foundational start to kind of challenge the status quo. Ask yourself why we're structured the way that we are. Could we optimize further what would be the best fit for us based on our sales
of the organization? So I'll leave this with all of you for a second to digest. Happy to answer any questions here. Otherwise you'll have it as a great resource to come back to.
Could you explain the
could you expand the labels? Please?
These ones here in the center.
Yeah, just where what they are and how they relate to customer success on the right.
Okay. So if we were to put our like, we have a buyer, and that buyer is someone who's going to be net new. So let's say, we've got a customer right. And Veronica, I see you in the middle of my screen. So I'm gonna say your name, Veronica. So we have a buyer. Our buyer is Veronica, and there is an opportunity to drive revenue growth
from Veronica as a customer. But in order to drive revenue growth. We have to. I'm gonna pick on Charlie because Charlie's next on my screen sell to a whole new resource, and that resource is Charlie. So we may leverage Veronica and the success and partnership that we've built with her, the relationship to introduce us to Charlie. But Charlie is technically someone net new that we're gonna need to sell to in order to drive that revenue growth from an expansion perspective. But if we're like Hey, Veronica's or gal that we need to drive revenue growth from then it makes sense that the customer success manager may be the one spearheading that initiative because of the deep rooted relationship and partner and historic partnership that she already has with Veronica as an example.
Does that help.
Yeah. Got us. Thanks.
Okay.
On the third. Sorry to interrupt on the third row. Essentially, you're talking about

the contract value. But if it's small.
yeah, or smaller than the original. Maybe
customer success is best suited to address it.
Yeah, average contract value, and from my experience, and would absolutely welcome like others, feedback on this. Oftentimes, when you think of like the average contract value if it is I wanna say, like smaller in value, but also a little bit more on the transactional side. It doesn't take up a significant volume of time, effort, energy, negotiations, etc, etc. Oftentimes it's most efficient. Have the Csm. Who's already involved intimately with the customer to execute on that versus. If it is a large deal where it is significantly higher in terms of the average contract value that you're looking to extract, there's often a lot more sales, acumen, sales, discipline, multiple stakeholders involved longer sales, cycle, etc, and a sales team would be better equipped to take on that responsibility.
Yeah, and just just one more quick. Follow up on that one. So that that assumes then customer success. And this is a broad category. I don't know if the Csms or account managers, or what, but then they have some commercial
skills to in order to do that right? So you're adding more skill, sets to the to the requirements.
Yeah. And that kind of goes back to the last side slide. Sorry in terms of like, what are the jobs to be done? And then what are the skills required for those jobs to be executed against.
And Sydney, I'll just jump into the way I think about it isn't so much about
the IC that's doing it because I think that in customer success you might start off very early, where Csm. As also doing support and onboarding, and a variety wearing a number of different hats as well as renewals and that sort of thing, whereas there's a certain stage in in a company where either if you're dealing with, say procurement, or there's a lot of legal or something like that, and it's taking away from the other
duties, then, that you may have say, like a renewals manager or an account manager. But I still see that as being under the Cs leader, just because then it's, you know, unless it is a new sale within the organization. If it's basically a hunting activity, I think of it as going with sales, if it's still essentially related to the farming activity, I think of it as under the Cs leader.
Yep.
Great feedback. Thanks, Jan.
This one's definitely a hot topic like I said, like no one. Size fits all. I think I made a mistake on a Linkedin post once, where I think it was perceived, as I thought it was. A one. Size fits all like holy crap. I'll have a disclaimer in my language, moving forward. It's never a one. Size fits all, but so many nuances definitely agree. Different stage of organization can have a heavy influence, and what the right strategy is here, and I think just always have to be open minded that
as companies grow and evolve and change like this is something that changes from my experience pretty rapidly. And it's this delicate balance of like, not too much change. But are we optimized to be operating as effectively as we can be to retain and grow.
Sydney. Just a bit of clarification on the when you have Company Size company focused, you. You know.
Company, or do you mean the customers we're selling to his company?
The latter great clarification. Yeah.
Thanks.

Yeah, company size in terms of Hey, we're selling to the Enterprise, or, Hey, we're selling to the Smb and mid market.
And then I think a company focus actually is on us. Right, are we heavily doubling down on retention? Or are we looking to drive growth growth growth growth growth.
Yeah, so sorry. It was actually a combo of the 2 when you said the last 2
awesome.
So
in addition to what are the jobs to be done, what are the skills required? This is probably the number one thing that needs to be very, very clearly defined. Which is when you have sometimes depending on what structure you take in terms of role structure teams, etc, involved in revenue.
What are the roles? Responsibility? Who's accountable? Who's to remain informed who's consulted. And this is where I see. Have seen a lot of tension friction. Lack of cohesion potentially erupt, particularly between sales and Cs.
On a positive note. I have also seen it done incredibly well. When this type of framework is put in place, and you, as the leader, take the responsibility of going through with a fine tooth comb, of defining. What are the jobs to be done? Who is accountable? Who is responsible? Who's gonna remain consulted and informed, clearly communicating that expectation to the team and then holding the line, making sure. Obviously they're trained and developed on what that looks like in practice. And other little asterisks also being like they're always going to be gray area from my experience as well. And you just like blanket it with, we're going to adapt. We're gonna evolve. We'd love your feedback throughout the process. Keep it coming. But this is knowing what we know today, knowing where we're headed. Strategically, this is the framework that we're going to follow. So this is something that
I have loved implementing seem to be incredibly fruitful. Wanted to share here with all of you. It's tactical, but I have found that it provides the team with a lot of clarity on where they are to be focusing their time and energy, and where they are going to expect
time and energy from their peers and partners in driving revenue, retention, and growth. And that goes a long way in having this beautiful unison between all parties involved versus what I've historically seen to be an OP. An opportunity for a lot of friction.
Just check in the chat.
Hey, Sydney, did you?
from a racy perspective and just driving change within the go to market organization?
I'm going to be a little bit controversial here, and say, you know, in my humble opinion.
cs might be better change, change change drivers than sales shocker
have you, is there any data that shows that because I think that as we talk about a customer led growth, and you know, as you're sharing, you know, showing, defining the races across a a. You know some shared processes
that that Cs is is in a really good position to lead a lot of this transformation. And
again, I don't know. That's my finger to the wind
just conjecture. But I don't know if there's any data that that has that you've seen, or other examples where Cs is better than at sales, that we're marketing and leading kind of change and transformation around these go to market processes.

It's a great question. I can't say I'm sitting on data the backst. I have anecdotal feedback based on my personal experience. I think one of the key factors here is that this is never driven in a silo right like, when I have built this out in past organizations, it has been in partnership with the sales team and not just sales leadership, but Csms
renewal managers account managers, aes, and getting their feedback, getting their influence throughout the process, and having them be a part of building it alongside myself and my leadership peer on the sales side. I have found that from that experience it's not a who is better at leading the change. It is. We are unified in making this change better for the business and our customers as a whole.
But if it comes purely top down, which I have, you know, seen an experience in the past, it does not land, and it can often feel like this, like, you know, kinda who could do it better? We can. They can versus we're gonna build this as one does that make sense.
Yeah. Yeah. Thanks.
Yeah.
Great question.
Any other questions in the chat. Sorry I lost the chat here.
No, you're fine. We are up to date. Thank you. Yeah, absolutely. Unless anybody would like to come off mute. If you have a burning, question, please feel free.
I I maybe have a question around like the operational side of it, and we may go onto it. But, like are you are. You mainly like driving the behavior either through compensation or
like a Crm with hard stops to drive that behavior. You just showed.
Yes, we are going to get to that actually, on the next slide in terms of compensation cause. That is a hundred percent, a critical ingredient in that being done successfully. It's not just about. Here's the role. Here's the responsibilities. Here's our experts.
Expectation.
Of who is accountable for what? But it's also the are we incentivizing to double down and drive those behaviors? Because at the end of the day. I would argue sales even more than Cs. But Cs, gaining a little bit more of that like revenue you know. Produce this output. I get this, you know, paycheck in return. That obviously dictates behavior heavily. And it's really important that there's compensation, alignment. So great question
awesome. Alright. So our girl Alison's gonna whip up a poll here. Oopsie, sorry, meant to go back. To double comp or not. The double comp that is a often
sensitive question. So really curious to get your perspective today. Whether or not you are double compping in your organization, and we'll keep our poll tally in mind from earlier in the the presentation around
who just has revenue responsibilities today from a retention and a growth perspective, but very curious to get a pulse on double compen.
Okay, they're still coming in. I'll give everyone a few more seconds.
All right, fantastic. Let's share the results.
tough split alright so ever so slightly. Non double calming. Is taken the lead with 51%. So really, really interesting to see.
Alright, just looking at the chat.
All right. Laura's coming in hot with a very timely conversation recently on double conversation. I look forward to hearing that.

Okay, so I may be preaching to the choir, probably a little bit on this one. But compensation, as was just asked, like, really should be used as a mo motivational lever right to to drive the desired actions the end of the day. I think a lot of folks when they know what's gonna influence their paycheck and the ability to over perform from a variable compensation perspective. Putting in place the right compensation structure.
heavily influences the outputs that they're able to produce for the business. It has, from my experience, double comping come with a bad rep, but in my opinion it shouldn't. And there's a lot of benefits to double comping. From my experience, unified collaboration and ex execution between sales and Cs. When everyone is aligned to produce the same outcome and to be financially compensated for that outcome.
A lot of friction goes by the wayside, and people just do what it takes to get the job done and do it together. Which is very much a cost saving strategy at the end of the day for the business and is going to produce the highest
return from a retention and revenue growth experience. The other thing is, we may have experienced this ourselves. You all have. I have certainly, which is, there is nothing worse than being on a customer call, and it being blatantly obvious to the customer as to who is incentivized to you know certain rep retention or revenue numbers versus the other individual on the call. So the overall cohesion in the customer experience is improved as well.
so emmanuel and I were chatting about this when putting together the the deck, and I think that you know one of the areas I underestimated in spending more time as a leader was in building a partnership with finance. Part of it was probably a little bit of intimidation and fear to be perfectly honest. I didn't know what I didn't know. And
I also early on like just kind of took the here's what you get and thought that was good enough and realized like, am I as a leader doing best for my team, taking that approach versus hey? If I build a relationship with finance department finance, leadership, better understand their world, their pressures, what they're up against. I could potentially learn how to better speak their language, which may find us a mutual win win.
and at the end of the day I think Cfos are looking to maximize, revenue, retention, and growth, and do it as efficiently as possible. And there are different ways that one can approach double comping that actually doesn't cost the business more money. So here an example, one an example to pros and cons. I won't go through it in detail, but great slide, I think, for everyone to reference back
to and not be intimidated by leaning into a conversation with sales, leadership and finance leadership, to say, Hey, what is an opportunity? Where's the opportunity for us to co-align compensation with our partners and sales to maximize the revenue we bring in for the business. We grow for the business, and also reduce any friction points which often cost the company a significant amount
amount of money. So I will just like caveat asterisk. This, like these are levers, and the levers can be moved. But this gives you an example of how to at least start the conversation, or look at the conversation, to have an advocating kind of point of view on why, double comping is actually not gonna cost the business more money. It's going to reduce the overall costs.
but would love to hear. I know this is a super hot topic, would really welcome thoughts, feedback from you all in terms of what you've seen work really? Well, you know any Cfo or Vp. Finance

conversations you've had that the messaging landed well or in partnership with your sales, sales, friends.
Hey, Sidney? Question in example 2.
Do you ever have a pissing match between, like, you know, the Cs identifying the expansion opportunity, the am arguing that that's not the case, and that they were both on the call when something was flagged. And then.
you know, is there ever disagreement? Because sometimes. That can be, you know, who who actually deserves credit versus claiming credit for it.
Yeah. So back to that racing model that I would say, like the racing model. Typically, from my experience, you kind of cover as much ground as you can. But those edge cases that I said, you know, those are gonna come up. And typically what I've seen work well is
you roll it out and you see what pissing matches evolve. And then you come up with a okay, let's react to it in the moment to come up with a solution. But then how do we standard a process? Standardize a process around it that is going to be sustainable long term? And I've seen. I've seen mixed models where it's just like, do you know what? You are both on the call.
like.
Okay, great. You're both going to get comped in some regard for it. I've also seen that not happen. It's like it's the Csm's call, like they are in a post sale world driving growth. And then I've seen like a blend of the model. So again, it's a little bit goes back to the framework of where are you at in your organization? And where do you want your team focused? And who is responsible for what actions? And that typically can draw a little bit cleaner
lines to minimize that those types of friction points. But it it is a realistic scenario that comes up for sure.
Sydney, can I just ask about the
pumping part and the role
involved in closing the deal? Are you advocating for Csm to be involved in negotiating.
pricing.
and closing the deal from that perspective.
So it goes back to the framework, where sometimes I do think that is not a bad idea, and in a world where it is low contract value in terms of the expansion, and it is low, like lift and effort to actually execute that. For example, if you have a lot of automation. Then I would argue that it is probably more efficient for the business to just have
have the Csm. Execute that play, and or you have a renewal management function that takes on that responsibility and actually tries to blend it into the renewal motion and get a renewal early out of the process. But if it is a high contract value expans growth, you may be selling into someone else. And it's going to take a significant lift to be able to achieve
that. Then I would argue that you want your Csm's focused in other areas of the business.
And it hasn't been your experience. So that's impacted negatively on the relationship with the customer. When.
No else.
Pricing negotiation, but no.
Yup, from from my experience. Honestly, it hasn't made a difference, but I'm sure there's others that may have been like, well, I saw something go real South, and I'm I'm sure that's true. So

open to thoughts and feedback from my experience, it has come down to expectation, setting with the customer in terms of what the individual's role is.
Okay. Thank you.
Chris, that's great feedback in the chat.
Appreciate that.
Chris, just out of curiosity. Did you evolve that so like when you looked at, you know the cost to do it relative to the Roi on that investment? Did you then evolve that comp structure further and have to change things up in over time.
If you're comfortable.
So just to give a little bit more context, I think I was at an organization that was not comfortable with Cx. Owning any sales expansion, upsell, cross cell, and
you know, in essence we were not in control of our own destiny. I was looking at it more from a business perspective and
obviously
expansion upsells at a much lower cost of acquisition. And we have the products to do so. So. The initial first year was double comp.
both at the same rate, which was consistent to a sales rep getting paid on new logo. So I I didn't want sales reps to not be involved. I didn't want them to jam too much product into the first deal. I wanted to be able to reduce sales cycle length as well as get Cs involved immediately and driving value so that they can get that next expansion opportunity.
So the first step was the double comp at the same rate, which was same as commission for a sales rep for new logo it was so successful that our Cfo. Had to get a a debt round to pay commission.
The second year I left, but from what I heard they kept the same model. They may have trimmed back from a year to 6 months, though I think.
Got it.
Helpful context. Thanks for sharing.
Yeah, my pleasure.
Awesome.
Oh, sorry, my bad! Any other thoughts, feedback, double comping, want to go in that deeper, or shall we move on? Alison.
We are up to.
8.
Tat. There's some great conversation going on, but we can continue with the content, for right now, thanks for asking.
Beauty
alright. This goes back to Charlie, and a little bit more on, like the tactics right? Of what does the operational discipline of customer led growth look like and I think for for me one of the things that I really loved as a Cs leader, as I mentioned earlier, is just like being the the nucleus of the organization and kind of being the communication center for all things, customer insights and being a strategic advisor
quite frankly to peers on the leadership team by coming to them with data, insights and recommendations. And you know, in Cs, we often are privy to okay. Who are our customers that there's something about them that is really successful. Right? It seems easy. They seem to want

to buy more. And we're like, okay, let's double down on that, and rinse and repeat what it is that is like the underlying
attributes of that. At the same time we sit on the other side of the fence, where we see customers that struggle to see value quickly, and there are a plethora of different reasons that that may happen.
But one thing that I loved. You know that I've seen in past organizations that we've implemented is this ability to put in place both risk and churn reasons. I like to have them be consistent, so why a customer is at risk is ultimately the same as to why they
turned and the reason I love taking that approach is when you are communicating to sales and product and engineering usually more often, those being the the key stakeholders. It's very easy to tie. What is the AR?
What is the growth potential that we missed out on? And what are the number of customers that we have lost to these specific risk and churn reasons. And it's not about pointing fingers as much as it is surfacing the information and being prescriptive regarding here are things. I think we can change that are in
our control. So, for example, if it's an adoption issue, then I would argue that there's a really great opportunity for product engineering and Cs to put their heads together to think through how we can amplify the adoption of our product that's going to correlate to a customer retaining right where where those key value drivers are. So I think it's really really important to have an operational discipline
like this to be able to communicate routinely and effectively. One thing that I love mad shout out to partners, John White and Shawn, vp. Of product and CTO at catalyst was, they actually had a shared okay, tied to revenue specifically around risk and churn for the product right and every single quarter.
Their team was looking at. What are, you know.
risk reasons tied to the product that if we focus it on addressing, we are going to minimize the amount of revenue that's at risk, minimize the number of customers that are at risk, and to have that alignment honestly came from Cs presenting the data right, and it gave them the opportunity to put something within their control to have meaningful impact on the company's bottom line. And I think that having that cohesion that is truly like an operational discipline of a customer, led growth.
organization, and the strategy and practice. It really drives strong alignment and moves the needle quickly. When you've got everyone orienting around things within their control that directly tied to improving retention from a revenue perspective and ultimately driving revenue growth as well.
All right. So before we move on to how the heck do we drive organizational change any thoughts, questions, feedback on this last section.
Aircraft in the chat. But please feel free to come off of mute.
Okay.
Goal.
So from my experience, big mindset shift more than anything, right? Change is hard. We are natural creatures of habit as a human. And if the last couple of years have taught us anything, the only thing that is constant is change. So I really like to challenge myself going like what was my like? Old Cs mentality? And what is my like? New revenue leader? Mentality?

And a lot of this I use for myself, but also to coach and mentor like teams. That I manage through this change. And one of the common objections I will hear from a Csm. If they're now going to take on some responsibilities as it pertains to identifying revenue growth, potential or opportunities, etc, is Whoa! Whoa! Whoa! Sit I am not a seller. I became a Csm. For a reason. I am not a seller. And the way that I like to think through this
with them is you're not selling, I think. Oftentimes it's like this very negative, like highly packed just mental state that people get into that have like a negative connotation with selling. It's about understanding what are the pains that the customer is experiencing and prescribing a solution that has value tied to it? And at the core. That is what Csms are doing day in a day out. Incredibly well, so I try and just help them bring it back to like one. You're doing it already. But 2 shifting your mindset
that it's about identifying a problem and a pain that they have and prescribing a solution. If they feel there is value in that solution. They are going to be willing to make that investment. And that means you've done an incredible job of helping the customer solve for that pain.
The other one. We talked about this one a little bit earlier, but it's like elbows up. Hell, no, we're not going to have product or engineering talk to my customer. Are you absolutely out of your mind, Sid? This
is like a make it, or break it in terms of customer led growth. A product and engineering team can't intimately understand the pains and the opportunity and the value that a customer is getting from their product if they are not speaking directly to them. I know we like to think that we can like translate the message very effectively, but it breaks down over and over and over again. I think we've seen that routinely. So, giving
product and engineering the autonomy to get in front of customers, do it in partnership with the Csm. And also building a culture of feedback amongst those stakeholders is really really critical. And when it's done well, it is something that is a huge hit for customers and for the internal teams as well. And then I always hear, you know, like often here, you know. Cs is like, you know.
you know, the stepchild. They they don't get the respect like it's all about sales. Sales gets all the recognition. The reality is, the time has changed. Industry's changed. This is required adaptation, and it is an amazing, amazing, amazing opportunity, in my opinion, right now for sales leaders. Our respective teams to lean in to this industry change and our ability
to drive high impact, high influence revenue at the end of the day for our organizations based on where we sit.
So some clothing thoughts I had amazing executive coach, and she constantly encouraged me to like.
you know, introspect, and also think strategically. And what I realized when she asked me like, Okay, Sid, you're gonna think strategically like, walk me through what you're gonna do. I'm like she's like, tactically, I'm like, Okay, I'm gonna open my laptop, you know, like, set up my notes. And she's like hell. No, that is a terrible idea. And she's like, why is that a terrible idea? And I was like, I don't know, she said. You are like operationally focused when we open up our laptop. And it's go time, right? We've got our checklist, and we're just cranking away
to get into a strategic mindset to really challenge our thinking to really question the status quo and the norms, and why we're holding onto these past beliefs and questioning whether they're really working or not. We need to like, put ourselves into a different environment. So I've

become privy to going for drives to think strategically, going down to the water and kayaking to think strategically, going to a coffee shop to think strategically. Just give yourself time and space. But, most
importantly, in an environment that is not just, hey? I'm gonna open up my laptop and try and crank away in a fashion that you do operationally, because my experience I've untapped a different side of my brain that I didn't quite know, existed by changing up the environment and challenging myself. With this type of activity.
The other thing to be a reminder of is, Be patient. I know there is always a ton of pressure on all of you as leaders, and that carries a significant amount of weight. But change is hard progress over perfection. Look for those like tiny incremental changes done consistently that day over day, month over month, are going to start having meaningful impact and celebrate honestly the crap out of those, and I think Cs sits in a really valuable position, where we have the opportunity to be the cheerleaders and champions across the company but celebrate the right behaviors that you've seen. Whether they're big or small. It's less about the holy crap. We just sold a million dollar deal, and it's more about who did what actions and activity leading to that we want everyone to see and rinse and repeat over and
over and over again celebrate those operational disciplines. And then you're going to start to see the tides shift
and community. You all are amazing community. We have 54 absolute Badass Cs leaders on this call. Lean into your community. There's some great insights shared here from people who've been there done that people who haven't been there done that, but are looking to learn it's amazing opportunity to tap on one another's shoulder. Lean in and candidly, I know a lot have often feared like. Oh, sales, you know, there's so much fun.
But I have learned so much from folks like Emmanuel Scala on sales acumen sales strategies that have actually enabled me to be far stronger on the Cs side than I ever thought. So I think one area to always like check ourselves is maybe like, put down past biases and go like, what can I learn? What can I bring to the table to help them? And I really see this shift in partnership and collaboration
and less friction than I've historically seen between sales and customer success, which is amazing, and last, but not least, remember that you are the leader. For a reason it can be a very, very intimidating position to be in to have to call the shots. But trust yourself, believe in the shots that you're calling. Lead your team through that change again. Be patient, celebrate the wins, but
do what you're gonna do with conviction, and others will follow. And you're gonna learn something, and that's the beauty of what we get to do each and every day. So that is it, that's all. I have included a couple of resources that I really love. I've mentioned a couple of times not to to plug them. But catalyst. I've loved a lot of the resources that they've put together around customer led growth. Specifically, there is a very, very tactical report.
Charlie. This one might be for you, but I believe it is the definitive guide to customer led growth. This is like all of the very tactical operational cross functional processes to put in place to exemplify a customer led growth strategy in practice. And mad props. I gotta give out to Jay Nathan, if you are not subscribed to growthcurve dot I/OI live for Wednesday and Sunday mornings.

For the content that he pushes out always gets the juices flowing big big fan so hopefully, those are some great resources in addition to the deck that you can take away from today's conversation.
I'll stop sharing my screen for now see if there's any questions.
Yes, please, I would love to open the floor up there again is great conversation going on in the chat, but no direct question. So if there's something that has crossed your mind, please feel free to come off of mute. We'd love to hear from you.
So, Sydney, I and I'm willing to to wait till everyone else is done asking questions. But
I I saw Ed Chu on top line, hotline after right after the merger, and it was really cool to hear about
the you know what what your 2 companies are doing, and really nice to to hear him.
and it sounds like is his heart's in a total right right place. And so you know what what it you know, it seems like you're fortunate that work for work with a leader like that.
But would you be open to?
I have. I don't know anything about catalyst, and I'd love to just to understand where catalyst is best in the world. And what's kind of the 10,000 foot functionality that that you
that catalyst provides so. You know I'm not expecting everyone else to
to go through that. But I'd love to hear your your ad advertisement for your company and
and anything you want to share. I I do like to to kind of note on systems.
Well, I appreciate that, Charlie, also full disclosure, as I mentioned at the top of the call, I've actually been on maternity leave for the last 8 and a half months. So I have been privy to all things catalyst in terms of what they've been doing, but not to the probably level of intimacy that you would hope to get from me to be able to speak to. You know all of the cool things that are happening in the product and whatnot. But be happy to take that offline and connect you with the right folks
catalyst, who could go far deeper into that with you. But there's a ton that I, you know, have heard from like the outside over these last 8 and a half months. While on leave that I'd be happy to share as well.
There!
Cool.
Hey, Sydney? I had a question. If no one else does.
Yeah, go for it.
So I've got a small customer success, customer, support organization that I'm just now starting to
enable incentivize, engage to have them do some digging
the
drive, cross selectivity.
The challenge I'm facing now is just getting people more comfortable with with what I call going, playing defense to play in midfield.
Just who. I haven't seen the one factor
just in general getting them more comfortable in their skin and having the right to do some of that midfield plays.
Do you have any recommendations for how to do it? Whether it's it's

on the coaching side, on the like. What? How do you kind of enable that defense team to really start to
own the midfield and feel that they've got a seat at the table for those midfield place to enable your true offensive place.
Yeah, it's a great question. And I welcome others, thoughts and feedback as well. I think from my experience, start with the Y really helpful for everyone to understand the context of why you're making that shift right? Why are you encouraging the team to move from this defensive to midfield mindset? And then once you've nailed the Y so that they understand really, at the end of the day, the impact that they're gonna be able to have on the organization from making that shift. It's teaching them what great looks like like. What does excellence look like in operating in a midfield mindset? And why is that going to then drive impact tied to the organizational change that you're after. And then to your point. It's about the coaching and feedback right? Seeing it in practice, and that doesn't have to come
all on your shoulders. I've always loved the train, the trainer model. If you have a person or 2 on your team who's very strong in this area. They're already exemplifying those behaviors that you're after. They're often the ones that are eager to take on a bit more responsibility outside of their scope of work and want to be tapped. For, like these mentorship leadership opportunities, they are perfect candidates to build in partnership. This training, and also this coaching feedback. I am a big big advocate of the diamonds and spades feedback model learned that during my envision days and have never let it out of my sight. Since definitely worth Google, the key is the feedback with a level of specificity. It's not, hey? That was good.
It was, hey? When you said this, that was great, because and it gives a level of specificity to help the individual understand why what they did was great, why it aligns to that midfield mindset and the impact that you're looking for them to drive, or if they've fallen short.
Okay, great. Here's what you did. Here's what excellence would look like. Here's the impact that you can drive. Try it again. I'm here, I'm pretend I'm the customer, and, like, you know, have at it, and I think going back to like my perfect, you know, not shooting for perfection, just progress, incremental progress, that's great. And then I'll also call out like you as the leader. It's the crappy part of the job
like, do you have the right people? That sucks like that is not a fun, you know, question for us to have to ask ourselves, but we owe it to our teams to help them understand why we're making this shift. We owe it to our teams to help them understand what our expectations of them look like.
train, and enable them on how to achieve that, and if they are unable to bridge the gap. Then we have a responsibility to the business to make the call on whether they are right fit for the role itself, that you need them to be exemplifying those behaviors in
that help.
Yep.
Sydney. I I can ask a question. Thank you so much. This this session has been great. I have been in many roles where the marketing leader is like really disengaged with customer success. And this is like one of the first teams I've joined, where the marketing leader understands like customer success as a growth lover, and how to use customer referrals to help us close more new business.

So I'm wondering because our customer community is very close, like they call each other all the time, and are not competitive, and I would imagine it's the same at catalyst
as someone that was doing on a zoom call through.
Happy fraud.
Thanks at 1 point.
Gary.
But
yeah, but I'd love to learn like, how how do you think about like customer success role and supporting the referral motion like very tactically like, Comp, you know, any any
hidden gems, or you know programs that you lifted off the ground that like, we're really successful to make that connection.
Yeah. I've seen the kind of the spectrum, I think you know, when you put a target to it, and whether you do it in the spiff format. So I think sometimes with the variable comp, if you wanna include in the variable comp, but should be, from my experience, something a little bit more like concrete, and it's in there for repeatable quarters over quarters, over quarter, maybe for like the year, as an example at minimum but I find spiffs to be a great way
to look at it on a quarter by quarter basis. Build up that muscle and that kind of excitement, and the drive, and then, you know, you can ask yourself whether it's something you want to continue to maintain as part of a spiff, or whether that's just something that you include as a an expectation. But that is, that is definitely something I've seen. I've also seen it, not just from the hey? I've got a referenceable customer. But
hey, let's comp on the influence of that reference. So your goal is to get your team to build them up as an even stronger reference to the point where they're influencing deals that close. So that's another kind of revenue model that I've seen tied to referenceable customers, referrals.
Perfect. Thank you so much.
Yeah, no problem.
I've also seen that once you put that in place, references and referrals come out of nowhere. You're like Whoa.
I mean? Yeah.
Very impactful. But again, it's like, Where do you want the team focused? And have you tied some dollars to it? And oftentimes you get some pretty quick results. Which is nice to see.
Yeah, yeah, I mean, definitely, I, I'm definitely more the advocate of building the muscle and the culture and not having it be like a long term. Spiff like this is, you know, just part of being a good customer. Success employee at the company like you need to. Yes.
you know, connect our customers with other. You know, potential prospects like, that's just part of what you do in customer success. But I I definitely understand the spiff mentality that
you know they do come out of nowhere when you have a step.
Yeah, one of the framework. So I I built a framework in my past around like these are, you know.
To see it back.
This is what like excellence looks like as a Csm and a Senior Csm, and that could be something that if you have a framework. I'm happy to share the one that I've built in the past that you could incorporate right like my expectation is that you have, you know, 75% of your customer base is a referenceable customer. And that's just what an excellent Csm looks like. And if you're looking

to get to a senior Csm, well, my bare minimum expectation is one of the things you're exemplifying is that you've been able to build strong relationships
in your customer base and have our sales team leverage and marketing team leverage them as a referral or a reference. So that may be something, Veronica, that you could like include, incorporate as more of like a structural framework. That lasts like foundational versus the spiff kind of hot take of the quarter. Here's the muscle that we really wanna drive.
Yeah, yeah, no, that's great. I I'm rebuilding our levels right now. So good timing.
Sick.
Yeah. Thanks. Sydney.
Yeah, yeah, no problem. Good to see you
awesome. Alison, I know there's like 10 min left. You're the pro. I'll leave it to you, do we? Do breakout groups. Is that like, you know, not even worth going down the path of? Because we're too tight. We'll give everyone 10 min back. I'll follow up with Charlie Offline on his catalyst inquiry, and we'll call it a day. I'll take your guidance.
What I was thinking is, I have these amazing questions that Sydney prepped. If we were, gonna do a breakout. I wanted to gauge the room and see if we share them in the slack channel. You guys could have, you know, a little bit of an offline conversation in the slack channel, and if for those of you, maybe even bring it up, touch base on them. Even in your cohorts, it won't be a required discussion, prompt for your cohort, but we're gonna put them out there to you. Share them in slack, and I'm gonna go ahead and share them
and the zoom chat now and then, you all can, you know, connect and collaborate offline just due to the time constraint, I know. Luckily Sydney got through her content. So that was priority, and questions were answered. Does that sound fair to you, Sydney?
Alright awesome. Well, at this time we do have a few minutes left. Anyone else have any final thoughts or questions, I'm happy to open it back up
alrighty.
Well, then, with that being said, do you have any final words to me that I could pass it back to you.
No, I mean, I just super appreciative of everyone. Also, like I mentioned, I'm a big big fan of feedback. Would love diamonds and spades from all of you. So please feel free to add me on Linkedin. First of all, I'd love to be connected. And second of all, I would genuinely appreciate your feedback. All of you. I have a tremendous amount of respect, for I know is not easy shoes to be in as a Cs leader revenue.
I'm a new leader. Add that as we grow and take on these responsibilities, and I'm learning myself, including, you know, learning through delivering this content to all of you. So I would really really appreciate your diamonds and spades and feedback to help me continue to learn and grow as well.
Perfect. Well said, couldn't say it better than myself, and it was a true pleasure to be here with you today, and everyone as always. We love your engagement and questions. Thank you so very much.
I am shared the feedback link in the chat. I'm also gonna reshare Sydney's linkedin. If you scroll up a bit, you're gonna see the discussion, prompt questions that we were going to do in a breakout. You can take those questions and collaborate with your fellow Cco. School members

in the slack channel or offline. I'm gonna also share them in the slack channel. So this is not the last time you'll see them.
Other than that. I don't have any other important announcements. Most importantly. Be well, have a wonderful week ahead, and we'll see you next week. Tuesday at the same place again.
Thank you, Sydney. That was wonderful.
Thank you, take care!
On, and.
Alright, thanks. Sydney.

Class 7
text
Hello! Hello! Welcome, everyone!
Welcome back week 7. I'll give you all a moment to get connected to audio.
Thank you for joining us today. Wonderful to see your familiar faces
at this point. We're all old friends right? Week 7.
So I'm gonna keep it brief. Today, I don't have any major important announcements other than welcome back. We're happy to see you. If you're willing, enable please feel free to turn your cameras on. We'd love to see you today as always. My name is Allison, and I'm happy to help answer any questions related to Pavilion University or Cco. School. So please feel free to send me a message in the zoom chat if I could be of assistance.
All right, welcome, everyone for those of you that are just hopping on. I hope you're having a great week
now for the good stuff. I am thrilled to welcome our instructor today. Seth Seth is the director at of community at gainesight 6 years in. We were just speaking before we jumped on today. 6 years at Gainesight, with a lot of other amazing experiences that he's gonna dive deeper on. But today Seth will lead us in a discussion on scaling Cs nail. The basics, then lead the industry. So thank you, Seth, for being here. I'm happy to pass it over to you.
Thank you so much, Alison, and thank you for turning on the camera. Your tamers cameras, the folks of you who have done that love to see our faces and have this be a conversation. Today. Our focus is on customer success. I'm hoping to really leverage the fact that we have people with customer success, experience, but also services, experience, and support experience, and so on. To add some
richness to the conversation. Do we look at this from numerous angles, cause it's about nailing the basics, but it's also about what does it take to lead the industry in terms of what what scale looks like but before I get into any kind of content, let's start by helping you understand who on earth I am? So as Alison gave you a little bit of a preview. I've been at gainsight for about 6 years
before I joined Gainsight. I was actually a gain site, admin at a gainsight customer.
So that was when I first entered the ecosystem something like like 8 years ago, and then I became a Cs. Ops leader. Then I came to Gainesight as a Cs. Ops sort of senior individual contributor ended up leading the Cs. Ops team. At that point I switched over to running our Cs. Ops community as a sort of individual contributor, again ended up leading the community team. And now, most recently, I've transitioned into

what I'm broadly calling customer scale innovation. I'm still retaining the director of community title for the moment. But the type of work I'm doing now is sort of like a
a full stack. If you think about sort of like a full stack engineer, I'm like a full stack innovator for scale programs at gain site. So everything from what is the strategy of a program that we could stand up through actually running the pilot of the program.
So this is by way of giving you a broad introduction to who I am, but also to give you a sense of the different types of experience that I've been personally steeped in that I'm bringing to the conversation today. So you'll see the Cs Ops angle. You'll see the community angle. You'll see the innovation angle. That's all part of today's presentation.
But the goal I'm going for is actually less presentation, more sort of chatty vibes. Because, as I mentioned, you know, the different sets of experience that you bring from your different areas, but also even for those of you who work specifically in customer success. The different experiences you have for your own careers in your own companies. I would love to bring those out of the woodwork today. Because you have so much to teach each other as I'm sure you've discovered over your previous successions and in your in your cohort discussions and such.
so to help us ease into that, I wanted to start up with a war, start off with a warm up question and feel free to put your answer in chat, feel free to use, chat to vent, or just, or or just to be more factual. But either way, what's one thing in your life that you wish were about 50% less chaotic? So this is a thematic for today, but feel free to share something that's work related or not. I will. I will lead us off while you think, and maybe drop something into chat.
for me something in non work. Life that I wish was less chaotic was my right knee. I pulled it like 2 or 3 weeks ago. And I just turned 42, and I think the forties is when things start to take multiple weeks to heal. So that's going on. Something in my work life. I wish we're about 50% less chaotic is with these programs. I'm running. We haven't quite figured out the cadence of
how I sync up with my boss about the, you know, 15 different things that I'm poking out and working on, let alone how we sync up between sort of the vps of the on the team. What are the different innovations that we're that we're poking at? So
thank you, Don, for that little preview
I'm just going to. I'm going to put a PIN in that. The good news is that my husband will hit 50 before me, so I get that sort of preview. And I get to always be younger than him.
Darren, kids activities in sports. I understand that those can be
quite something to keep track. Of. How many, how many kids activity? How many kids are you wrangling activities in sports for
or
across what ages? Darren.
9 through 16 so
and don't get me wrong. It's great to have them in sports and activities, whatever it's better than the alternative. But that's the gong show on the when you mix your work and home calendar. It's just a blur of colors. From 7 Am. To 9 Pm.
I believe it, plus. There's some spicy years in there between 9 and 16. I'm sure that makes it even more entertaining.
Chris, I feel. Yeah.
although I tried to. I tried to balance my newspaper reading at the same time
play our house renovating.

Did you know how to rewire your house before, or are you only discovering that now.
I've learned to plum my house and rewire my house through Youtube. And somehow it's still standing. So.
Oh, wow! A plus I was, I was contemplating hanging a TV on the wall until I watched one Youtube video and was immediately petrified, and did not so good for you.
My advice is, don't go down the Tiktok route, because that is 100% chaotic.
I believe you. I haven't even gotten to install. I haven't gotten to the point of installing Tiktok on my phone. It just overwhelms me
my husband is has enough Tiktok for both of us. Okay, awesome. Thank you. All for participating in that agenda for today. Firstly, I want to talk about what is scaling even mean. I think there's some preconceptions there that I would love to sort of broaden the scope of how we think about it.
Then I do want to walk through the sort of bread and butter scaling techniques and make sure we're looking at the whole ecosystem of of what these techniques are.
And then, lastly, I want to talk about some of these new frontiers of scale. So community programs, cohort-based programs for customers and AI and chat. Gpt, how those can be part of scaling a Cs motion.
So back to back to chatty vibes.
Let's get the sort of read of the room here. Please use the raise hand functionality. If you if you did the Zoom update, you might have trouble finding it. But you know we can hope
for what his scaling looked like in your experience. This could be just like a simple statement or a little vignette of what it's looked like to bring scale to an organization. But basically, when we say this word, what experience comes to mind for you.
Anna, I think you were trying to raise your hand. There we go. Thank you.
Yeah. What comes to mind for you, Anna.
It's a technology always fails us. It's supposed to recognize hand movements. But early does. And for me, scale is automation.
So kind of, because I'm coming from the technology world.
So for scaling as a company, you want to scale revenue, want to scale revenue either by having more clients or by having same amount of clients paying more.
And I think that the main component that enable that usually is automation, because with automation you can do more, with less.
Watch it.
Thank you, Anna
Charlie. I think you were the next hand that went up. What? What, what does scaling look like from your experience.
Well similar to Anna. So scaling. When I think of scaling, I think about scaling your process, and usually the process is
begins this manual. And then you have to say, Okay, well, we need to add people to this process. We need to be able to do this across
multiple times or more frequently, and and that usually involves some form of automation or some you know, it could even get into.
you know, quote unquote transformation. But so the scaling process, no scaling or scaling people when you're just adding people, you know. So

I started an organization of 600 people. And then, you know, it was a few years later it was 1,600 and you know. So both of those are people and process. But that's that's what's what comes
up for me when you when you ask question.
Thank you, Charlie.
and Rob. What about you?
Yeah, I think I mean, in general, I just thinking about, how do I do?
How do I do more with
the same resources. I don't want to say more with less I'd be, but but more with without automatically, you know, trying, spending at the same rate that you're
that you're engaging so is some of it is is is automation, as other folks had mentioned.
But also, just how do you
engage? How do I engage with customers
in groups of customers as opposed to one on one. So things like
like an office hour, where you can address multiple customers at once or
yeah, or case deflection, where you can point customers to the knowledge base as opposed to having engage with your high touch resources.
thank you, Rob, and I think that
1 one thing I've noticed from those from those
3
contributions
was that it's basically like, what what does more look like? And there are a lot of creative ways that that can
be that can manifest like an office hours. More could be more people. To Charlie's point, it could be more
technical infrastructure. It could be more
clarity and organization around. What is what is the process that we're doing. What are the actual steps we're taking? What does that codification look like? But there are just so many different answers to the more question that I think that's why scaling can manifest in so many different ways.
So
one thing I wanted to also bring to mind is that when we think about scaling. We're often talking about scale in a large team type context. But these scale sort of tactics about what does more look like? I wanted to point out that those also have some resonance even for small teams.
So if you just sort of take the little mental experiment now of if you imagine, like a team of one to 5 Csms who were wave a magic wand. Gifted risk playbooks gifted an automated customer. Welcome email. Things like that.
What kind of impact does that have on those one to 5 Csms, you know, it's just a little bit of codification, a little bit of automation. But those Csms are probably living in a world of chaos already. Speaking of the 50% chaos point earlier, they are
dealing with. You know, a product team that's probably rapidly evolving the product. They're dealing with new, different types of customers. They're trying to figure out what are our risks, even like, let alone what the playbook should look like.

what? What do? What do customers want to hear from us? Let alone what an automated email should look like? So even in a small team being able to implement some of these tactics about what does more look like can be really impactful. And so I think that is a
It is a clue that we need to think about scale, not just as a way to make a large team larger, whether that direction of expansion is with people or with software, or what have you? But think about it in terms of operational quality.
and the one of the main points I wanted to leave everyone with today is, you know, put in a right up front here. That operational quality matters.
So any time any size team should consider whether there are scale tactics that are right for them.
And something we very much notice is that leaders typically invest too late. They have a sort of pain driven investment. This, in this, as opposed to a benefit driven investment, it is much easier to recognize the things that are on fire than it is to realize the opportunity that's sitting there on the table by
automating something that would increase customer retention or expansion, or what have you?
And overall? I would say that scaling is essentially anything that brings structure and calm to chaos. So that means better lives for your Csms. So better teammate, retention, etc. Better better skill, growth for those Csms. If they're not
mired in chaos, they'd be able to spend more of their brain power and actually becoming better Csms.
better customer experience and outcomes. If there's less chaos. If your customers are dealing, not with a team that's constantly running around from risk to risk and putting out fires. But they're dealing with a team that's being thoughtful about how to usher them to outcomes and has this sort of brain space to do that. That's incredibly impactful, regardless of the size of the team.
and it makes your team more resilient to the financial storerooms, as previously mentioned in the chat to product, stumbles, outages and bugs, and so on. And other things that go on this list of the unexpected problems that we can expect to happen so you can build your resilience upfront with these, with all of the tactics that we would put under the scale header.
So let's talk about the sort of bread and butter, scaling techniques.
we spent a lot of time at gainsight thinking about
how do you describe customer success to?
To customer success leaders. So these next few slides are an adaptation of the best practices that we've compiled around what to scale look like
category. One is helping Csms to self, manage their like path through their through their own day, their own week, their own quarter.
So this can look like a number of different things that will help Csms out.
So for first of all, anything that helps a Csm to standardize what their workflow is, so that could be playbooks. But it could also just be having the place where they're expected to take call notes.
It could be standardizing their their decks for an ebr, at least like a sort of a broad deck template. Whatever those things look like to help the Csms. Not not feel like they have to invent the wheel every time.

Number 2 a single source of truth and insights, truth and insights like very close concepts. When I say what what I want to distinguish here is the difference between. This is the place I know, defined.
Who are like? Who are the customers that I am managing? There are a lot of companies where that is in a spreadsheet somewhere, if it's even, you know, in a reliable spot anywhere, especially very small companies, and even large companies can have trouble wrangling that because of.
Well, if they are a product, if they if they're a customer of this product. But that product is sun setting, and they're like a prospect for this other product?
Are they a customer? Are they churning? Are they a prospect like? So, anyways, what is that single source of truth?
And single source of insights, so that could be things like, where do I go? Do I to decide if Mike, this customer is using the product? Do I log into some sort of product dashboard. Is it in a product like gainsight? What are these these key insights that I need for doing my job and having that place where they're expected to go.
Number 3. I'm borrowing this from this statement from a friend who uses it all the time in his role as a Csm. Measure what you treasure, and also measure only what you treasure. The more things, the more measurements that you expose Csms to like. Here's the nps of your customers. Here's the average, you know acv of your customers. Here's the the tenure, and and if you stack the more metrics that you stack on the
less clear it becomes for the Csms. What they should be optimizing for I think that there's a difference between
there's like 3 levels to this. There's the number of metrics that's so overwhelming that Csms don't know where to go.
Then there's the metrics that are manageable, so they can.
You know kind of keep track of the things that are most important. But if you get even more focus than that, then it helps the Csms truly manage their path and focus on optimizing what those metrics are.
Those will be different for every company. But that clarity helps Csms.
And then, lastly, automatically, collect customer info. So this would could look like product usage data. It could look like surveys. It could look like now that we're in the world of AI scraping documents from the sales process to determine who are the key contacts. Whatever this might be. Take the burden off of the Csms. To have it basically give the Csms a shorter list of things that they're expected to notice and then record.
So first of the of the 3 categories I wanted to mention help Csms to self manage. And you're going to help your team scale by reducing the chaos that they're exposed to
Number 2 treat customers the same.
And what I mean by this is actually
treat similar customers the same. Of course every customer is its own snowflake.
or in this AI generated graphic that its own garden plot, but at the same time
those customers that are largely the same in some respect
can have some kind of standardization that's brought to them. So rules of the road for similar customers, whether that's customers who are an onboarding sort of like a journey based similarity, or it could be customers in the same industry, customers of the same tenure. We

could be talking about customer contact. So people who are the same persona, whatever those you're unlikely to want to codify
different rules of the road for every single one of those possible ways dividing up your customers. But knowing what are the most important similarities to look for and develop the rules of the road. That's item number one
and number 2, a repeatable process for persona engagement. So when you identify who those personas on it. Personas are that you are. You want to make sure that your Csms are in contact with
have a process that runs like clockwork.
So if the Csms aren't just sort of running around using post-it notes to keep track of. When was the last time they talked with Customer X.
And then, lastly, develop a standard standardized set of customer outcomes
so commonly referred to as a value realization, framework or value realization process. What are the typical outcomes that your customers can get from your product.
and that gives you, by by codifying that another set of similarities between customers, that you can develop roles of the road for and treat customers the same. So this is all about taking your customers out of every single customer as a snowflake zone.
Hey, Seth, can you just expand upon that last one?
The. I'm not sure.
Yeah. I'm not sure that I totally understand that label, and what you're describing.
Absolutely
Let me talk in terms of gainsight, because that is what I live and breathe. The best standard customer outcomes from people who are customers of gain site are things like improve retention, improve expansion, or.
Things like him.
Nps. Then there's community metrics like, what are those? Are? The lagging outcomes
the the. If you were to drill into those you could say things like one way that we would improve at retention is by standardizing a renewal process.
So you can sort of get down layers and layers like, what are the
workflows? So a customer would have put in place? Or what are the main goals that they are striving for? I don't think that that there's evolved a like specific framework for how to create a a standardized set of customer outcomes. Going pretty meta there. But that is a that's what I'm getting at. Does that
does that help demystify it?
Yeah, I mean, could you say this is a standard set of customer measures and metrics that you're trying to drive
towards that potentially are are lagging. But I mean, is that an incorrect statement.
It is. Let me make. Let me
clarify that, just to make sure that
there are a couple things that that I could interpret what you just said to me, and let me just clarify which one it is.
It is the metrics that your customers are trying to optimize for
so Gainesville.
Your customer.

Trying to optimize their retention rate.
And so we have recommended workflows that they would put in place in order to improve their retention rate, or their expansion rate, or the percentage of their support tickets that are deflected by their community. Or what have you? So knowing what those outcomes are from your customers. Perspective helps you to build
programs that usher those customers to those outcomes as opposed to thinking about every single customer's outcome as a completely different and unrelated from every other customer's outcome that they're going for.
Okay, thank you. That's clear.
Absolutely looks like there's some thoughts also dropping in the chat about that. And we'll have a a minute to talk about this at the end, too. Of this little wee section. So curious for other people's thoughts, too.
Last thing I wanted to wanted to blast at you before we pause, for a little bit of reflection is standardizing your communications.
So when you have
a bunch of different ways, you can communicate with customers. Email in app,
webinars, etc, standardizing the what these channels are. So first of all.
automate your getting started content
that could look like getting started for A, if you're A B 2 B company getting started for the entire company. So automating some of those onboarding type resources. But it could also be user based getting started content. But whatever it is, don't just
put it somewhere that someone could theoretically download, but automate the delivery of it. Whether that's in app or through emails or sort of like coin operated through certain slide decks that your onboarding team uses with every single new customer. Or what have you? But make sure that's getting started. Content gets under the right hand. So it actually gets used.
Number 2 templates for your customer moments. So I alluded to this earlier with a like a slide deck template for Ebrs, for example. But whatever that new customer welcome email is, don't make your even if it's not automated yet. Don't make your Csms. Write it from scratch.
Thank you.
Provide the template.
Similarity. Similarly, for the renewal process, what does that email look like? That kicks off the renewal, etc, etc. Make sure that there are templates for those for those moments that you want to make sure every customer experience is the same.
codify your mass communication channels. So, as I mentioned, there are all these different possible ones. What are they best suited towards? You know, an email is not gonna be best suited towards
instructing someone how to how to navigate through a piece of software. You click here, then you click there. That might be something better in a in a set of sort of like a video library you have of walkthroughs that might go in an education Academy, or it might work best with a sort of in App Walkthrough engagement. Created with something like gainsight. Px. For example. So what are these different communication channels, or what are they best suited for
know which ones you go to for what and which ones are established. Some of them are easy to stand up like emails. Some of them are extremely powerful, but take longer to stand up like communities. So

know what your ecosystem of them is, and know which ones you're trying to nurture next.
And then, fourthly.
have these central locations of knowledge, wisdom, and advice.
Another thing where there's like subtle differences between these things. But knowledge is what I. What I mean by that is support, documentation.
Customer education, sort of factual stuff about your
products and services. Where is the one place that people can go for that.
What I mean by wisdom is.
if you're getting started, we recommend that you start here.
Or here are customers. Here are case studies of customers that have been particularly successful.
So
whether they are your wisdom or cut other customers, wisdom having those sort of codified place where this is. These are the wise choices to make. And then advice is, where does a customer go when they want to talk to someone who's not their Csm.
that could be a community. It could be a number of other number of other things. It could be a conference. Where those places that someone can go. That's not necessarily just, you know, searching Twitter for people who are posting about your product.
But having those centralized locations give people access to more advice that they than they realized was even out there.
So that was a lot of content. So I wanted to take a moment to step back. These bullets are copy pasted from the previous slides, and I wanted to kick up a poll here. Thank you, Allison, for what's your personal like must start here. So amongst all of these different things that we talked about, if you were stepping into a new role, leading a Cs team, which of these feels like
if I'm gonna start anywhere, you know, every situation is different. But if I'm gonna start anywhere, it's gonna be with this thing. And as we heard about earlier, no right answer here. So I'm trying to get a sense of what is the spectrum of perspectives in the room about where you'd really want to start as the first thing to put in place to get this operational excellence.
Perfect. I'll give everyone a couple of moments. We have about half
participation so far about 50, so I'll give everyone another few seconds. Thank you for your answers
still got answers coming in. I'll give you another moment.
A lot to read. I can.
Yeah, and we've got some great responses across the board, so please take them all in. There's no no Major Rush here.
Alright took a pause. Let's go ahead and see the results. Thank you. Everyone.
Thank you. Allison.
Course.
Alright super. Oh.
I don't know about you all, but I had to extend. Extend my window to get all the different options to show up.
yeah, some real spread across the board here. What I would love to do is actually.
I mean, if these aren't sorted by by popularity. But I would love to effectively start at the bottom of the list and hear from people where your perspective is more unusual in the room. I think that

it would be really interesting to explore. What is the thing that you saw in that bullet that really speaks to you? Because again, no right answer. And so, but would love to hear what
what it looks like for a person to be drawn to these things that you know, according to this, are just less common as the first thing that someone would go to so we're looking at the folks who answered rules of the road for similar customers.
Automatic getting started content.
and then repeatable process. If we go to the 8% ones like maybe throw in some of those, too. But like if if someone responded, one of those I would love for you to hop off mute and and share your perspective.
Yes, Seth, I I answered, the templates for customer moments, and I think
and I think I kind of ended up there. Just you said first thing. And I typically think of what is kind of low hang fruit, and that
that seems to me to be a a low effort, one that's
with the small team we could. We could probably bang out a few templates and put them in place in the course of a day or 2 and just get it get something going. So that was kind of I was kind of leaning towards what's something that could get in place that could help us really quickly.
Hmm!
So in the the cost benefit like really zeroing in on the cost and optimizing for that side of things.
Tala time to time to value for the for the team was that whereas some of these are hugely beneficial, but could be
weeks or longer to or months, even to actually get the impact up.
Gotcha.
That was my take, anyway.
Absolutely. Thank you, Rob. It also occurs to me that a template is something that doesn't require a huge team effort to create.
And it's something that's easy to iterate.
So it might be, you know, not too disturbing to to try to put in place. So anyways, thank you, rob other reflections from those sort of less popular
responses.
That I
Go, back, ignore.
I'll finish my thought really quick, Lisa. Thank you. I chose. Measure what you treasure in my experience. When you talk about scale. You talk about a fair bit of effort and things that you're going to stick with for a bit, even if you're gonna iterate them. And when you aren't data driven. There's a risk that you you get really bought into things that take you in directions that
you know, may not create value, or, in the worst case, actually dilute value. And so making sure that you're keeping track of results, you're delivering to the business and tech customers as you take undertake. Some of these other operating activities have always been really key for me. So measure what you treasure, even if it's not perfect, even if it's not your complete dash in the end, you've gotta gotta keep an eye on true North as you start building some of these things, implementing them and making sure they're actually working for you and for customers.
Hmm.
thank you, Andrew.

and something I very much heard in there is measurements can be imperfect. So what's the good enough
that you can get started with.
Thank you, Andrew.
Set. So I had I picked automatic getting started. I actually expected that more of us would have picked that because for me
actually, onboarding a scale
is something so automatically automatic onboarding enough tutorials and walk through.
It's it's a topic for scale.
and
which would definitely add value to the day to day of my Csm, so automatic get this stuff that I understand is is automatic. On boarding a boarding a scale or
through whatever time move.
But definitely, that is something that would help me scaling in my case, specifically.
Gotcha. Thank you, Eliza.
And one thing I very much heard, and what you're describing is
looking for what is the real time suck that's currently happening for your Csms that can very much change the focus of of where.
Achieving it.
Like. In Rob's case, for example, he probably wouldn't just pick a random thing to create the template, for you would look for what is the what is the customer? Interaction that is most
that feels most burdensome to put together that content and focus with that template. So awesome. Thank you all, and sorry I should have done the raise hand thing to to prevent the the talking over each other thing. I think that one take away. Here is the degree to which taking us really assessing your situation is important to figuring out what to pick first. And it reinforces the degree to which this is a thing that changes from company to company, from situation to situation.
and even potentially from like Cs sub team to other Cs sub team within the same company.
Okay, super. So that's the bread and butter stuff. Let's talk about new frontiers.
And one thing that ties. These all together.
I would say, is decentralizing advice making the Csm. Not the only place that a customer can go to for advice, for wisdom, for knowledge.
So the 3 I wanted to talk about here were community cohorts, which is very vague. I'll describe that in more detail, and AI and Chat Gpt. For Cs.
So when we talk about community
on the left, we have a screenshot of a slack channel that gainsight Admins started on their own. This isn't owned by gainsight, the Admins of of gain site, Cs. Started on their own, and on the right we have bubbles
at a executive. Get together at a at at the gain site. Cxo. Summit. And so the question is, if these are both community like, how on earth are these the same things like. What is it that? How? What, what is it? What is the thread that ties them together?
And I want to refer you to it to this model called Spaces, which I cannot take credit for. I believe that Cmx developed it. You can google it if you want the spaces model of community. If you wanted sort of dive into more detail here. But there are these different

purposes for community in A B 2 B context that can be swirled together in this sort of alchemical kind of way in order to create a a beneficial community. So just to quickly whip through these, a support focus community is like that slack channel that we just saw. QA focused
typically very product feature functionality type, focused
product means product ideation, product feedback. So voting on new ideas announcing product roadmap and product updates those kinds of things having conversations around the product in a way that informs the creation of better product
acquisition are communities that are are typically owned by the marketing team. It's like, let's get our. Let's get the whole industry together. And because we are the ones that own this community. You know, it's sort of like a content marketing type play. This is like the gainsight pulse conference is the quintessential example of a acquisition based community. So that, like metrics, here are things like,
pipeline influenced by people attending or participating in the community
contribution. This is communities that are things like.
Imagine a community of air B+B hosts who want to talk about like
thread count on linens and things, or Etsy creators like a a community of people that are creating something. And it's not only examples like that. I think that there are also examples in the B 2 B space. If you could imagine, like a community of people who are building add-ons that have Api connections to your product, that would be a contribution community
engagement.
These are communities that are just simply for your customers to have somewhere else to be more engaged with you and your environment and your industry that you are a part of. So just giving them something other than using the tool and talking to your team members in order to really feel like they are engaged, part of the of the ecosystem.
and then, lastly, success. This is, you know, whereas the support community is very focused on feature, functionality, a success. Community is very focused on
what are, what's the whys
choice to make, or what is even the spectrum of choices? This community that we are a part of on this call today. This is quintessentially a success community.
We're not talking about feature functionality. We are talking about what is the spectrum of strategies that that can exist.
So these are all the different threads that can be woven together in order to create a community. And so, in a way, it's helpful to think about a community as a product that you are creating. So we can steal the product management canvas from the product management world. And you could essentially fill this out to say what is the most important thing that we want our community to do.
By way of an example.
Let's say you're building a support community.
What the customer needs or wants is fast answers
our solution for that with this community is experts from our community. Answering those questions.
The value prop here is that it's not just information, it is reliable and trustworthy information.
the engagement channels like, how are you?

How you actually getting people to participate here in the context of a community and engagement channel sort of comes with the package. But you have to pick whether it's going to be slack or an online forum? If so, how is that going to be structured? etc? So 1 one example here would be a like forum website that has sections that are based on features of the product.
What is the competition or alternative? So for
answers to questions, your competition is your support reps
your product documentation, people, googling things, etc, etc. So therefore, what's your competitive advantage? And for a support community that would typically be something like rapid back and forth, in order to get exactly the right info for the exact situation that I am struggling with in bringing this question to the community.
So
that is a
general way to think about. What is it that a community can do for you in the context of scale cohorts? So I I mentioned that I've been, you know, in this sort of scale innovation role.
The way that I essentially transitioned into this role was that we detected some signals of successes that were out there, and they got woven together into my role or into my first initiative in the new role. So the first was that that Admin slack channel started, and it started of its own volition, and it went like gangbusters, which is not normal for a new community to just start and go on its own power. So that was very curious.
Number 2, when we host our pulse conference, we host a set of roundtables at lunchtime called circles of success that I help organize, and frequently those are considered one of the top experiences
at a pulse.
at at a pulse so really interesting that just getting people to talk to each other is very impactful. Same thing with the executive roundtables at that summit where the bubble photo was from, like, those are commonly the top things that people say that they like about that Cxo summit. And then, lastly, we started a program where new customers were lumped into a cohort and went through the sort of first steps together. And people really loved that. So what do we do with these signals. And what I did is I put together this program called the value Accelerator focus on a particular use case.
and the value accelerator was composed of 5 different components. First, one, inspiring executives about why they might want to implement this use. Case number 2, getting the Ops people from our customers to apply because they're the ones that are actually going to be building the thing.
Number 3, giving those Ops people self-directed on-demand learning for exactly what they would need in order to implement that use. Case number 4,
facilitating live discussion and problem solving between those Ops people. Because there are a lot of questions that come up that are not feature, functionality related that are more strategy. And how do I talk about this challenge to my boss or to my boss's peer? You know things that are not related to the product at all. Those things come up. You need to provide that. And those live discussions for people to problem solve those together.

And then, lastly, the scope of the content in these conversations was providing hand holding to these customers all the way from the sort of conceptualization. Of what could this use case look like
through culture, change in the organization? So just to make this just slightly more tactical and and understandable, the
first use case that I focused on was a basic risk management program. So you want to create a record of when there's a customer risk and have a playbook to apply against that and have a report that shows you what are the set of customer risks. So you can imagine there's sort of conceptualization about like, okay, what are our risk types, etc. But there's also the culture change and change management of how do I get my Csms to actually start recording these risks. So this was the full scope of value accelerator program.
and what I found is that the real value in it was having a sense of a brain trust much like you all have through with your with your conversations here, and probably especially in your smaller groups, the real
a stew that came together that made it feel like a brain trust was 3 things. Firstly, these are people who had the same
active initiative. They weren't just people who were sort of curious about in this example. Standing up a risk program. They all had decided that their initiative, this quarter, or one of their key initiatives was to
formalize or revamp their risk process, and that gave them more to connect over and to talk about and to the sense of. I am in a room of people who are like me and working on the same thing, so I can talk more freely.
Number 2 on the bottom left. They had this sense of membership across a small set of sessions so essentially that make sure that they that they show up because there's a fomo of the sessions ending but also they have the sense of membership like. And I'm you. You are, I'm sure, feeling this, too, that you show up at these sessions because you are, you decided to join this thing and be a part of this thing. So that is something you need to manufacture in something that could very easily just feel like a sort of casual office hours.
And then, lastly.
warm facilitation, adaptive facilitation, strong facilitation, so warm and welcoming space for these people. You have to create, that you have to adapt to whatever their questions and needs are, and you have to have a point of view about what good facilitation looks like in order to be able to bring that space and create that space for people
just briefly doing a time. Check. Okay, cool
and so poll number 2
again, I just taught. I just added a whole bunch of stuff to the bullets that we talked about before. So those top level bullets from those previous sets of slides making Csm self management easy, treating similar customers the same standardizing your comms. But now I've added 2 high level things, community and cohorts. And so
I want to ask a slightly different question than we asked before, which is
in your business right. Now, if you were to start an initiative tomorrow, which do you think is the one that you would focus on.
which is going to make that which would make the biggest difference in your business.
Okay, we have a steady stream of answers coming in. I'll give you all a moment.

Looks like we have a clear winner this time.
I can't see, so I'm I am.
I know the anticipation.
Faded breath. Here.
We. I know we always joke. Usually like we need some type of music right in the background while the results are coming in some jeopardy.
Totally.
Okay, everyone. Thank you for participating. I'll go ahead and share the results.
Thanks. Alison.
My pleasure here.
Yeah, clear winter, but just barely a majority. Right on the line.
And some people would even, you know, there's some. And like before. There's some folks where in their business right now, the right thing is something more like community and cohorts so
really interesting to see.
I want to make sure that we leave a good chunk of time to talk about AI. So
I'm not going to pause for
conversation here, but if much like before. You wanna sort of make your case in the chat about like this is what you spoke to me about this particular point. I would love to invite you to drop that into the chat, because I'm sure that other people would be really interested about why someone chose something different than what they chose.
Okay, AI for scale.
I've been deep in the AI world at gainsight. I've like poured myself into it. I am all about it. So first thing I want to point out is that there are 3 different ways to implement AI and 3 ways to think about it in your business. Firstly, incorporated into your product. Some of your engineers do to add it to a piece of software
number 2, a customer facing flavor of AI, so that'd be something like a chat bot, or a smart search of your documentation and community, and so on.
And then there's sort of the At home for your team. How you make your team work better and smarter and faster.
So each of these could lead to a scaling effect. Make your product easier, more impactful, help customers get answers on their own and and help your team work better, faster, etc. I want to focus in particular on that third bucket. What does it look like to use.
Use AI at home with your team.
There are a few different ways to think about using Chat Gpt. I'm a very much a systems thinker. So this might be a little conceptual. But one of the prompts I have for you and your cohorts is to start to dig into what does this look like? Tactically? So I hope that this is a useful starting point, that then you can start to figure out how it maps to actual day-to-day stuff.
So first way to use to chat Gpt is as an oracle. So discovering information to solve a challenge, basically giving it a lot more context and nuance about what you are trying to do, so that it acts as a much better Google. Of course, it also hallucinates things and invents knowledge where it doesn't have the knowledge. So you have to be conscientious about it. One something that I've discovered, that sort of

threads that that that splits the difference. There. I'm gonna drop into chat. It's a tool called exa.ai, and if you click on the like, try search@exa.ai, basically, you can describe. This is the kind of page I want, and it goes out and and tries to find a page that match that matches that description. So I just did it when I was trying to research
places that are not touristy to visit in Croatia. So anyways, the oracle sort of use. Case number 2 writer. So you have a set of thoughts and ideas
that could be a call transcript. It could be your core use cases. It could be a webinar recording or webinar transcript, whatever it might be. You have thoughts and ideas.
You and you have a context or format that you want to put it into. That format could be, you know, early AI like Chat Gbt. Use case like it could be a poem. It could be a C shanty. But the format is more often in our context, like an email to this particular persona or a outline for an Ebr or something. So you define the the audience like, what does good look like for the thing you're trying to create and chat. Gbt is really good at
basically like cross pollinating those 2 things and showing you what that looks like
in the end. That kind of looks like it's writing something for you. But what's really powerful is that merger of concepts, thoughts, ideas, best practices, whatever it is with a particular context or format
inventive thinker. So there are ways that are hard for a human to think. If I give you a list of 35 colors. And I said Which one is missing, it is very unlikely that you would immediately say it's green you left off Green, and it's much less likely that you would be like you left off shartruce. So that's an example of something that's very hard for human to do, but extremely easy for Chat gpt.
There are other things that are also on that list like forecasting second order effects like, if this thing happened, what might happen next? What are the 5 different things of options, of things that might happen after this thing happened.
So that's second order effects red teaming. So if I did this, what
What would be all the terrible things that might happen, looking for blind spots and assumptions you're making. Those are all types of ways that Chachd can be a really helpful, inventive thinker.
concept calculator. So think about this as treating it much like a you use a spreadsheet, but instead of doing quantitative calculations, you're doing qualitative ones. So you put a huge amount of info in there and then you ask it for a swat analysis, or a list of trends, or, conversely, from trends, a set of outliers, and whether you're giving it text or images or code eventually, video, etc, you get to
basically use that thing I talked about at the writing line and say, here's a bunch of info. Help me do some calculations, some conceptual calculations on it, to turn it into something that's a more useful sort of way for me to understand it.
And then, lastly, interviewer.
I think it's very hard to just sit down and like, tell someone everything about your job
or about who you are, or about an initiative. So if you ask Chat Gbt to ask you questions about your experiences, your feelings, your goals, your initiative, your your boss, your team that you manage whatever it is
by having it produce questions for you to answer. It helps you put words to those experiences, and then you can take the chat in whatever direction you want, but that role of interviewer can even be like valuable on its own. Sometimes having a friend or a spouse or something. Just ask

you the right question helps you realize something, and it's nothing more than that. It's just about someone asking you a question that gets you to think about it in a new way. So those are 5 different ways to think about bringing Chat Gpt in to help your team be more creative and and empowered.
Bring people in, bring people into using chat. Gpt is not an easy process, though we've been doing that at gainsight.
We've been running sessions
to help our Csm. Team, and others get familiar with Chat Gbt. So some quick lessons learned from that experience.
Firstly, these sessions have to be at least weekly.
You need to get people to that point where they think, oh, right, I could use chat, gpt for this, and they won't do that unless you've instilled a habit. So you need at least weekly sessions to get that habit going, so that then that that flywheel keeps spinning.
Number 2, make sure to cover the simple basics. A lot of the questions that we got are things like, What's a chat? Gpt chat like, can anyone read my chats? Why won't it make me an image? And that's a question of which licenses you've purchased or not purchased. People won't trust their intuition about how this thing is supposed to work. Many other pieces of software. We're used to trusting our into intuition. But this is one where they don't. So you have to be clear about those basics.
Number 3 make it experiential.
It's really easy to demonstrate. And people are
happily watching. They are. They are. They feel like they're absorbing. But if they're not doing it, they're not learning anything. So we force that with giving them exercises to do in breakout rooms
explorational in the world of Chacht like. Ultimately I go to these Cs, these virtual AI and Cs conferences.
A lot of people have good ideas, but like no one actually knows how to do anything, or even what to do like. We're still at the stage where all that's being discovered. So because of that, you're not enabling people to do certain things with Chachb. You want to empower them to invent
use cases.
So think about how do you make someone into an inventor? That is a like really interesting topic. And if that's something that makes your brain explode, then maybe there's the person on your team who's more than like my kind of person who wants to wrestle with a really fuzzy question like that. But you need inventors to figure out how Chachd works well for your team.
And then, lastly, collaborative
experimentation with a new tool that is uncomfortable. And if that experimentation is optional, that is a terrible mix of things to do solo for your the people on your team to do solo. But it's incredible if they are doing it in a group where they have a sense of psychological safety where they can say things like.
Oh, what if we did this or like, have have you tried? Have you tried doing it this way, or instead of asking that, let's ask it this to be in a group where you feel that sense of collaboration and sort of free openness. Makes. It makes all the difference in helping people to chew on something

that is so novel, and build their literacy and familiarity with a tool that really operates very differently from any other type of software that people are used to.
So that was a whole bunch of information to process. But that's a quick overview of the things that have been on my mind as we've been thinking about chat gpt at gainsight.
Sorry. Just just a quick question when you're referring to chat. Gpt here. You're talking more generally about generative AI, right? Not necessarily. Just chat. Gpt.
Hmm.
yes, Chacht, I think, is the kind of kleenex here of the large language models that have a chat interface. So you could also think about anthropic has perplexity. Google has gemini, etc. Microsoft has copilot, which I think is using. Chach is using Gpt in the back end. But in any case, the
there are these chat interfaces. Then there are also these other types of dendritic AI around imagery and.
Sit up.
Video and so on. Sounds, you know, creating a a virtual persona for yourself. So you could just like feed it. A support documentation that would like create a video of someone reading that support documentation. That's stuff that I haven't played as much with. To be honest, I've been like exposing myself to it. But I think that the
opportunity for knowledge
use of these chat interfaces, like Chat Gbt is where the greatest sort of short to midterm opportunity is for for Cs team specifically.
But the persona and the enablement that you have here is is conducive to to sort of all those technologies you mentioned. Right?
Hmm! I think that's a great point. Yes, absolutely.
Becky.
Absolutely thank you for your speaking out.
The one thing I've noticed from talking with Cs leaders about this is that lots of people have a ton of interest, and they're invested in. This is going to be the way of the future.
But they haven't taken action yet.
So another thing where please feel free to drop in the chat. Maybe we can capture these names if you're using AI to help scale your team, please like drop a brief description in the chat of what you're using it for.
So, by way of helping us wrap up here today, I cannot believe we've been going for 90 min to to by.
To help you.
Just wrap up today.
And.
The main thing that matters is the question of why scale matters, and that is to expect the unexpected storms. So get your ship in order. Now get all your like ropes coiled and everything stowed, and it's locker, etc. Because a lost customer hurts you for years.
So, having this operational
excellence
helps you to hire fewer Csms and so on. It helps you with a number of things, but overall it helps with

resiliency.
Against the storms. Whether that is an extra customer that got signed on, that you don't have the Csm to assign to, or whether that is something like financial instability or a product bug, or whatever that is.
So, some key takeaways
get proactive to reduce chaos before it becomes a problem.
Standardize the work. So snowflakes are expensive, whether that's every customer is a snowflake or every employee's individual workflow is its own snowflake, like standardize those things because that makes it less expensive.
Decentralize the advice that your customers get. So use communities and cohorts to unlock wisdom that's out there in the ecosystem.
And lastly, AI starts. Now.
a lot of these tools might take a little time before they get
really super powerful and easy for a team to use. But experience is the only preparation, and people who start now are going to be better prepared to adopt them.
And that's my dismount.
Fantastic. Well, thank you, everyone. We have time to open up the floor. Let's have some conversation, some questions, some takeaways. There was some great conversation going on in the chat. We don't have any direct questions that I have come across yet, but I'd love to open up the floor, please. Anyone at this time that would like to come off of mute. You're welcome to.
Thanks, Charlie Claire, I'd love to invite you off of mute to say more about Scribe, how and how. That's how they're using that in the business.
Yeah, sure. We're a small
companies sort of scale up. And we. When I joined about 9 months ago, there was no process in the Cs team. They'd only been kind of processing the larger by the commercial team for about 6 months prior to me joining. So nothing was documented and everything was changing really fast. And I guess when you're going through that change management process with few people to then turn around and go. Let's actually now document all of this and make sure that we're using it. It's like
just a
more stuff to do. So we use Scribe, how just kind of basically turned it on as people went about their normal process when they were doing something that might be something like closing a renewal opportunity. It might be like updating data and plan hat, and then it just creates a document for you. So we then made that kind of pretty, put it in a sharepoint. And now, we have that kind of internal knowledge Hub, where we've got all of those processes documented, and it took literally
moments rather than days.
Wonderful. Is there anything you would do differently if you had to do it all over again?
Probably like a ton of things. Seth.
No.
I don't know. Actually, I'm not sure right now. It's kind of done what we need it to do like, we just needed that initial documentation of those those processes.
so yeah, I'm not sure at the moment.
Sure.

I'll get back to you. Yeah.
So wonderful. Thank you, Claire.
and I apologize. I did get turned around and made sure that we rushed to the end because I got I was. I was aiming for 4 Pm. Eastern, not 4, 30. So we have ended up with tons of conversation time which I am so pleased about because of those slides that I rushed through without getting a chance to, without getting a chance to really dwell on them and have conversation about them. So let's start with this topic here. You know.
The one of the slides I rushed through was.
who is using AI so far, Veronica, would you also be game to share about what you're doing on your team.
Sure. Yeah, thank you. Seth. This has been a great session so far.
So I
oversee the account management, support, engineering and customer success engineering functions.
We're a fast-growing startup called Fresh paint.
and one of our support engineers was looking at ways to optimize
not only tier one support questions that we get so like, very, you know, common questions that could just be
indexed off of our docs. But also
internal questions that they're getting from a lot of new teammates that we're hiring for growing quickly.
And frankly, questions that don't really weren't like a human conversation like can just be answered through like an I AI bot. So I give him a lot of props for building this essentially on top of chat. Ubt so it's a fairly cheap
model, too. We only have to pay for the license, for, like every you know, we're small. But just for our team it's like couple of $1,000 a year or something.
And it's that are just a great way to get
our teams on boarded faster. And then, as we like, add new products like it continues to index on our docs. So it like just gets smarter and smarter. We're kind of thinking about
in app, also
potentially having it like by instance. So if a customer is asking a questions, and then it starts to learn about like their specific implementation, then it could be even more helpful and customized to the customer. So that's kind of like a V 2 that he wants to build. But yeah, it's it's honestly been just like game changing for us to help us scale faster.
That's awesome. That reminds me of something I just saw on a hubspot
presentation today that they are feeding
product usage information into it. And so, if you combine that with knowledge about the customer, you can say, Here is a great like small Win, that the Csm. Could highlight for this customer, so that, like super power of combining knowledge with data with information about the about the customer at hand.
Ye, yeah, that's yeah. That's really interesting. And another use case that we have gotten to work.

So we have like a lot of integrations. So if the customer is like interested in turning on an integration, they can say like, Please turn on this integration, and then it will still Ping, you know, an internal team here to help them set it up. But
we could eventually like automate that. So if they
wanna just turn it on all just happen through the chat bot, which is pretty cool.
Nice.
One thing I'd love to double click on, and some other folks might have perspective on. This, too, is like
how to find that special unicorn support engineer, whether the support engineer, like whoever they are, who's going to build the first thing
and not just, you know.
drawn to tinker with it, but also
able to bring it up in the right way to leadership, or, you know, feel confident enough to bring it up. Anyways, I'm I'm curious, you know, thinking about that engineer or anyone else who maybe has now like raised their hand and like gotten more involved.
Veronica, do you have a sense of
who
who is that quintessential person? What would you look for to find if you didn't know who that person was on your team? Now, knowing what you know. What would you be scanning for? To find the right person for that kind of work?
Yeah, it's a good question. So I mean, in our business, like, our our product is fairly technical. So our initial support engineers are almost like software engineers. So both we only have 2 support engineers today. But they both were software engineers, not in this space. One worked like in government and the other one worked at a
a very like large car in yeah car manufacturer. And he built the like navigation system in cars. And so he just like really enjoys tinkering. And he shared in his interview process like how excited he was about one of the projects he worked on when he built this software
within like a vehicle. And so you know, he's like, obviously technically very curious. Then on the flip side of that, we do
a lot of like dog fooding in our interview process to make sure that they can really learn the product on their own. Since we're a startup, we don't have big enablement teams?
And have them like install. You know, our product and
show insights like through. You know, a website that they spin up. So this is a very like technical interview, that test for slope and just like motivation for
like taking that that initiative.
Interesting.
So, however, to tease out a few things from what you said there, this like special mix of tinkerer
is. Maybe that's the same thing as self motivated
but like like a like a drive to understand. Maybe they are like 2 sides of the same coin. But I'm curious if anyone else would add something to that about, you know, for those people who who might be
your
quintessential first tinker's with AI in your business.

What would you be looking for, or does someone immediately come to mind who you already know is tinkering with it? Or who, you know like this would absolutely be their jam. What are those other things to look for? Because I think that it can be hard to find those find those folks if there isn't like an official program that's, you know, been built around AI enablement. So I'm curious. If anyone has that other things to add, there.
okay, super.
Stop the group.
Oh, good! It's it's
you know. This is all
fresh stuff to wrap ones wrap ones around. So it's not.
Yeah, you know.
And you're tons of experience with it, you know.
Yeah, I mean, the the last thing I'll say is like, I mean, I I think a lot of software engineers just like, see immediately how much time savings they get from using AI like probably more than a go to market
individual does so
from like everything I know about AI and and engineers they're they just are figuring out ways to make their day more efficient, not have to write code that waste their time. So any like activity that's getting in their way of doing something like more technically hard. They're gonna find a way to automate it. And that's
what happened here. After making this hire like he just saw an opportunity to automate, and he went for it. And great like we, we
enable that to happen, something that we do here we do like hack weeks, which also is interesting. So it's a like a week where we allow our engineers to just
build projects that solve customer problems. And then we encourage.
go to market teammates to pair with engineers in those groups.
And so he like spun up this initiative around building an AI Chatbot for our customers. So that kind of gave him like the
innovation Center, I guess to, you know, have the liberty of bringing that kind of an idea to leadership.
Gotcha.
That's a great way to sort of have the catch all
open door
policy there.
Yeah.
Totally.
Imagine just stating like this is the thing that I'm interested in. If someone is working on this like reaching out like offering offering the hand would help bring out the people from the woodwork.
Thank you, Veronica, for sharing.
Yeah.
Just to dwell a little. Another moment on AI, because it is, I know, so novel in so many different ways for folks.
I wanted to pop this slide back up.

because again, this is all very conceptual and not thinking about it specifically from a Cs perspective. But I wanted to ask if anyone saw that one of these things feels like they. It particularly suits
the Csm role. Is there something that they saw where, like, Hmm, that feels like that'd be useful for a Csm.
We do actually use chat Gpt, for that. We have a kind of standard success plan
and we do use it for that. So you know.
bullet point things in a kickoff call and a discovery call, and then put it into the format that we've put into
Chat Gpt, and just to kind of get that standardized success plan that we can then play back to customers. So I guess that's the writer part, right? So that's quite useful. It's pretty basic, but it takes away that kind of
and lift for repetitive tasks.
thank you. Claire, that makes me
makes me think of something you would think about recently where there's 2 types of information, you can give Chat, Gpt.
It's one of those things that's probably much longer list than 2. But what I've been thinking about is there's the information for it to process and.
It's like.
Draws conclusions from. And then there's the information that is a example of what good looks like.
So you could have your sort of canonical best success plan, template, or you could just feed it 5 to 10. Pretty good success plans and say.
Figure out, you know, like, make a success plan based on these examples, and that would be enough. You don't have to do that generalization on your own.
So sorry, Seth. I was gonna mention that the the innovative thinker was is definitely one that for me is resonated. Particularly on the value engineering perspective. We, you know, we spend a lot of time trying to do value selling upskilling.
help devalue positioning in a sales engineer Csms, but obviously to to know an industry deep enough to
understand additional use cases, complexity, right stakeholders inside of a business, to involve to to achieve that solution. Is really tough and takes a lot of time.
So one of the recent uses of of generative AI is to essentially augment people's understanding of a, of a of an industry, a department, a business process, to allow them to identify blind spots, additional use cases, map that to product functionality to help cross sell up. So it's been a really effective.
Wonderful. Thank you, Jordan.
It also gets me thinking about.
One thing we're working with in one of our enablement sessions the other day was.
here is a standard use case.
How would that play out in such and such industry?
And even just providing some of the particular having it provide to some of the particular terminology.
was

like the the example industry we use was cyber security. And so to start talking in the terms of incident response, for example,
makes the Csm like come across as though they have a real understanding of the customers industry. So there's something there, too, about helping to translate from one industry or context to the next that I feel like can be very helpful, something about what you just said. Think of that.
Anything else here that people wanted to explore
or or have a comment on.
Okay, Super, let's go back to
let me adjust things here. Another one of the slides that I rest through.
Which was the where? Where would you start? Slide.
get my screen, share back up.
so I would love to hear again. Let's do. Let's do the same thing. Let's do. Hmm, yeah, let's do the same thing and see what comes out.
I would love to hear from folks who answered community or cohorts as the thing that really spoke to them.
As the type of scale that they are most hungry for in their business. I would love to learn what it is about your you know your business, your customers, your industry, etc, that make those, the those, the play that rose to the top of the heap for you.
If you remember what you answered to the poll.
On my set on my side, I'm again one of those that press on community. And in the same trend that I press on the automated.
Like on boarding, and on my side, community could be a very good channel to
train peer to peer, and also my side. Customers have this willingness to talk to each other that we are unable to meet. Yet so we like the fact that they meet with each other. We create webinar. So we create the on site events. But we are not able every day to have them meeting each other. So community is something that would be very high value
in my case, to have this peer to peer kind of talk that's obviously announced
training, but also brain reputation. And
I guess that is, there are all the challenges there. But community for me is something that it could be very powerful, and could, as you say, decentralize all the store for the Csm to customer that wants to hear from another customer how they handle the same type of problematic or challenges.
thank you, Eliza. The it makes me think about how.
Yep.
One thing I'm picking up from what you're describing is that there's sort of it sounds. It feels like there's
there's there's like a pooling of water behind the dam like there is a there is a
a
huge amount of enthusiasm, just sort of like built up out there, whereas like want to connect the other, and they just want you to
put the plugs together to to give them access to each other. Yeah.
Yeah, sometimes we feel like we are a bit of the bottleneck where? Because we are not able to handle all these

comments and requests where else they could very much speak each other, and that would work.
So we are kind of bottle bottle knackling, knackling all this
while. Top
comments and reactions and engagement really.
And so peer to peer is something that definitely is on my radar. And we have now passed the moment when we wanted to implement nurturing caverns, and I think it's no, it's no longer effective. We we didn't even make it to
to make that happen when I think is not really effective, like sending automated content throughout the description, whereas community could be something.
Yeah. So for me, that was my choice. For, like in this, in this sense, it would help us to decentralize a lot.
Awesome. Thank you, Eliza.
Anyone else have a reflection to offer on why community or cohorts stuck out to them as the thing that they decided to pick from that poll.
One thing I would just love to offer before we move on to the next slide I wanted to throw up was,
that a
program that I've been piloting recently really focuses on
creating those
intimate environments for customers to interact with each other.
So
let's see if I can figure out where I put this slide. This one.
the creating sessions that are don't have any kind of curriculum like that value accelerator I was speaking about had a curriculum. This is a particular use case we're implementing.
But a brain brain trust doesn't need that. It could just be customers who are using the same feature, or in the same industry, or or a similar spot in the customer journey, and you can still establish
all 3 of these different things.
and give those customers access to each other and host, say 4 sessions across 2 months, and give those customers the unlock their ability to connect to each other, and then all you need is a facilitator. You don't need elaborate slide decks and so on. You just need someone to provide that sort of warm, adaptive, strong facilitation to help them. Not just show up, and, you know, stare, blanket each other in an awkward way.
But that's the thing that I've been experimenting with, and has been quite successful and feels highly replicable across different types of customers that could be connected.
So I wanted to offer that as well, which came to mind based on what you were saying, Eliza, that that could be sort of a
low effort way to start a little bit of community connection.
Asha. I see you raised hands. What's on your mind?
So my apologies, I am getting over the flu. So on camera is not.
I'm gonna save you but it going back to the other slide that you had had up. I was a little torn between standardizing communication and community, just because in my last few roles, I would say,

I've and and I've
I'm coming at this from a sort of a.
A digital
digital Cs slash customer marketing, perspective,
standardizing communications by way of helping the Cs team with something as simple as a newsletter for customers
has always been really warmly received because it it's it's 1 one thing that helps alleviate some of the tactical pieces of information that I think often gets dumped on the Csm's laps to continually inform and ensure that customers are aware of, and rather than having them go through the tactical
parts of having to serve as that, you know, messenger it now, you providing Csms with a some form of standard communication as a tool
become, I've noticed.
becomes a lot more valuable to the Csms. And also appreciative of the customers, because now
you you have a an expectation of as a customer when and where they know they can get certain pieces of information and it and if you are so lucky to have a community where I have had that in the past. It is a great one to punch to work together and again help alleviate some of the tactical things that Csms are required to do. And now you start streamlining some of that information.
there are a number of things I could pick out of what you just said. But one thing that's sticking out to me is
using a lens on this list. Of
which of these most gives Csms a thing that they can point to, or point a customer to.
that is that things that can be more automatic. So, for example, with that with a gain site community, when a customer has a product request because we have a whole product ideation set up in our community. It's really easy for the Csms just point them there. So it doesn't become this whole conversation on its own. It's like, Oh, you have a product idea like this is where that goes. Say, I love the the point about a newsletter is not
only beneficial for
the first time that it lands in an inbox, but also especially if you post those somewhere, it becomes sort of a corpus of
reference information, and something that a Csm can.
You know, go back to and say, Oh, you! This is really interesting question that was actually in the newsletter 2 months ago. Let me let me forward that to you, to make sure you have it, or whatever, and and short circuits the conversation. Am I?
Am I reading you right. Is that how you is that how you were thinking about it?
Absolutely. And I love your I, your your example of product ideation as well. I've also seen how that we actually in one role. We we quantified the time
that Csms were spending just on the follow up and leg work around requests for enhancements, and we ended up quantifying that to 20% of their time.
Not just not, yeah, exactly, not just capturing the intake. But before status calls before Qbrs, doing the legwork to follow up with product on where those requests stood. It really takes so much time. And so I love the product ideation example. You provided as well because

it it in, in, in. It helps in so many ways, cause it also creates that transparency for the customer, and opens up the conversation with product, and I think it can be done in
in
in a less intrusive way than how product leadership typically sees it.
Hmm,
What?
What do you feel? Are the
this is going to be a little bit of fuzzy question, what do you feel are the hallmarks of a less intrusive
product. Ideation.
is culture too broad a word. But like the way that you work on product, you know, product requests. What do you feel like? Are the the.
the things you would like to say about how that works in your business?
I mean, I think that the typical push back right out of the gate is usually that customers will expect that everything that they post is
going to happen.
And and I think there is a a an elegant way of setting the tone
with both customers and product
in terms of what the spirit of that function is meant to be. It's meant to simplify the intake process. It's meant to demonstrate to customers that E. Maybe their request is not as important to the broader customer base.
And maybe they are the only one but it also help it. It really does. I think, help product.
Give them a way to communicate with customers in
in a positive way.
it is. It strikes me that it is such an art to
architect
a way of 2 people to interact.
Of course, it actually ends up being like more than 2 people, because it's like multiple people on your side, multiple people on the customer side. But to architect a way of interacting where someone wants something from someone else, and it is still a like elegant and positive interaction.
but it's possible.
But it has a lot to do with, as you said, setting the tone.
And then you have to figure out like, Okay, it's like, what is the tone that I want to set. And how do I want to set it? I'm gonna let my Cs Ops nerdiness shine through for a second as I flip back to the slide. That was basically a double click on those first, like bread and butter scaling techniques.
Each one of these is an opportunity for a Cs leader to say.
this is how our Cs team should.
This is how our Cs
practice should work.
I think that that that's what always motivated me about being in Cs. Ops is, I felt like I was architecting the perspective on what good looks like.
and I think a lot of things that are part of

Cs management
don't feel like that because they feel like they are the problem of the day.
the risk of the week, whatever it is, or architecting things like, what's the
What is the right way to structure our comp plan, or or what is the you know? Should I should I open a junior Csm role, etc, etc. But these feel like things where it. These are the quintessential spots where you get to bring your perspective as a Cs leader and say, this is what matters like. This is what's important to me. This is what I feel like should be the way that we do things of the business, and so that, like
Asha, when you said, setting the tone that just like really unlocked that part of my brain around these things, but but in essence those are the
those are the. Those are the things that are
when you are.
when you are standardizing things that are otherwise considered a sort of handle. It is a like special snowflake situation.
You are picking a rule of the road you are picking the way that something should operate, and that is something where, like you've been hired as a Cs leader in order to make those choices. So this in some ways could be taken as the menu of things, the menu of areas where, when thinking about how your Cs
team, how your Cs practice should operate just different than how a team should operate. But this is the menu of of decisions that you could or should be making in order to, in order to see what that looks like.
And then what that looks like.
That was all very high-minded. We have a couple more minutes left. I wanted partly to pop back to this slide. Because and I appreciate the thumbs up there. Asha I,
because, you know, we had a chance to double click on one of these that was not totally clear off the cuff to people. Is there anything else that people wanted to double? Click on in here here more, and where I can answer any questions about exactly what it looks like, exactly what it means. Exactly. If I've seen it operate before
any other questions, anything else that's bumping around the back of your mind.
That you would love to ask me about or just share with, the group that you feel like is really relevant to what you're taking away in terms of what scale looks like in
your job in the coming months.
Some.
Well, thank you all so much for the for the attention and the time, and the thoughtful, the thoughtful conversation.
I really genuinely enjoy getting to geek out about this stuff with you all so, and to do all the work of of putting this together. It was interesting and helpful for me, too, so thank you for the thank you for the stage, and for all of your thoughts, and have a great rest of your Tuesday afternoon.
Yes, listen.
Thank you and thank you, Seth, for being here. We appreciate you taking the time to put together such a thoughtful presentation, and for all of you for the engagement. You really made that a wonderful session. Thank you all for taking your time to be here with us today. Please feel free to take a moment, share your thoughts in the feedback link that I did just drop in the chat

we look forward to seeing you next week. I hope you all take care and have a wonderful week ahead. Thanks again, Seth. That was fantastic. We appreciate your time.
Thanks. Alison.
Thank you. Bye, everyone, take care.
See you next time.

Class 8
text
Hello! Hello! Welcome, everyone!
I will give you all a moment to get connected to audio.
Welcome back for our final Cco. School class. We are thrilled to be here with you as always. Thank you all for taking time out of your very busy schedules to join us for our live session. We have a special treat in store for everyone today.
As members continue to join. I'd like to just share a brief announcement. Since this is our final class. Our final exam will be available indoche. By the end of today you will have 3 weeks to complete it, and it is open book open note you'll have up until May fifteenth.
If you do have specific questions about the exam or this class in general, please feel free to reach out to me directly in the Zoom chat, or you can message me in slack, and I'm happy to help. The final exam will consist of 20 questions, and you must earn at least an 80% to pass. However, you can take it as many times as needed to earn your certificate. So that is all I have other than congratulations on completing this Cco. School, and welcome
Carly Emmanuel and Alison. I'm thrilled to have you today for our fireside chat. I'll pass it over to you, Carly.
Thank you so much, Alison. Hi, everyone! It's great to see you definitely some familiar faces on here. So nice to nice to see some of those, and if we haven't met before, my name is Carly, I'm chief of staff here at Pavilion. I will be leading what I am certain, is gonna be a very, very wonderful and insightful conversation today between Emmanuel and Alison.
We are. We are at the end, as as Alison said, we are. We're at the finish line. And I know it's been a really intense 7 weeks of lots of learning, lots of content, lots of lecture. So we're gonna change things up a bit today for the last class.
certainly. We'll get just as much learning, I'm sure. But we're gonna we're gonna this can be a conversation between Alison and Emmanuel. Kind of a fireside chat setup
will be like, I said, very conversational. I'm sure that there will be lots of questions throughout, so please feel free to drop them in the chat. I will make sure to weave those in. But also noting that we're gonna save about 30 min at the end of class to do an open QA. So we will make sure that there's lots of time at the end to get any questions you have about today's conversation or about content from earlier in Cco school, answered.
and yeah, I think that's I think that's it for for today. So what we're gonna cover today, we're gonna talk about
the role of the Cco and and how the Cco can drive our overall customer experience. We're gonna be talking about what boards and investors are looking for from a Cco. And how to land your Cco job, whether it's your first Cco. Job or a a new Cco job, and the important attributes that go into to landing that role.

And so with me. I'm happy to have Emanuel and Alison, and so, before we dive in, it would be great to do some quick intros. So, Emmanuel, I will pass it over to you.
Great. Hello, everybody good to see everyone again. I think you guys all know my background. I introduce myself
on the first class or the second class. But just in case you weren't there. As as it goes for pavilion. I'm the dean of the Cco. School, so put together. All the content that you saw and the presenters that you saw over the last 8 weeks. I'm gonna say some words to, you know kind of wrap up at the very end. But my from a career standpoint I've been in go to market my whole career. I've been in tech my whole career. Started off in sales.
Mostly high growth early stage companies have had a couple I've had a couple great exits and 3 ipos 2 or right after I left, so not sure I can count those, but I think I can say I
helped benefit the company cause. They were shortly after I left and one was at toast which I was there for, which is very exciting. and so as it relates to cs, I started. I pivoted from sales to Cs when I was at a company called digital ocean where? It was really one integrated. Go to market strategy and and and I led that end to end strategy. And then at toast, where
I spent about 7 years growing from 20 million
to over about 1.2 billion and an Ipo in there. I led the all the post sale function functions from onboarding through Cs team.
All the operations again, and support, and customer experience, and a bunch of other stuff from Boston. So I am now on a one year, maybe 2 year, maybe 3 year, maybe 5 year, maybe 10 year haven't decided but definitely one year. Minimum sabbatical from full time.
being a full time operator, and and and
it's in addition to this, right now I sit on some boards, I sit on 3 different boards, one public company, one series, E company, and one series a company so very different stages. And I am currently in the middle of teacher training, getting my teacher. Certification my Yoga teacher certification, which is
super intense. But very different from my other life. And people always ask me, Am I gonna teach? Maybe maybe not. I didn't go into it for teaching. I went into it for something to do to fill up my schedule. To be honest, because I'm not used to not having anything to do but maybe I'll teach. We'll see.
That's me, Alison.
Awesome. Well, first of all, I wanna say to the audience, y'all are very lucky to have Emmanuel as Dean of the Cco. School. She's super well regarded in the industry among execs, and you're lucky to have caught her. And during a time when she's like not full time operator. So so I just wanted to start with that. But I've also known Emmanuel for on time. I can't remember if we met when you were at digital ocean. But I remember when you were early at toast
and had had come from the sales role, which was, you know, great background to have, I think, like for for any customer success, leadership role. But you know also, probably in particular for toast for a lot of reasons. So it's an exciting to kind of like. Watch your journey and
and see you take toast public into big heights. So I I'm Alison pickins I think people mostly know me because I was a coo and previously Cco. And game site, which is a customer Success Company. I joined. We had about 1 million in AR scaled it to 85 million in AR while I was there. So we went through like a lot of different stages, and

in the process with the community sort of created the category of customer success software, which, like shockingly, didn't really exist before. Like 2014 there was sales software and marketing software, but like nothing for the customer success profession. So
you know, in order to basically facilitate our software sale, and help people create budgets. For this, we thought, well, I think we need to like create more legitimacy for the customer success function. And you know, ended up creating a lot of like thought, leadership and community building around that. I played spent a lot of my time like creating content. You know.
Po, like blog, post, podcast book, in the spirit of, you know, helping get together with a community to find like what this profession looks like. And you know, term skipping ahead to like where I am now. We sold gainsight to vista private equity in 2020 for a little over a billion.
and because I had advised a lot of Saas founders who were building customer success teams. You know, along the way gain site, I basically like parlayed a lot of that advising into creating a venture fund of which I am the sole general partner. So back in 2020 around the time when we exited. I created this venture fund. So I've been running it about 3 and a half years now, investing primarily in AI companies.
at all stages, but mostly seed and series. A also in the spirit of a portfolio, approach to life. At this point I have served on a few boards. And currently, I'm on the Board of Convales, which is a public cyber resilience and Data Protection company that's transitioning to Sas. And so interestingly like being. You know, there's a funny overlap between like customer success as an emerging profession and the transition from perpetual license to subscription business models. And so you know a lot of our clients that gain site. We're actually going through that transition. And I ended up joining conval to sort of like help help with that.
So yeah, that's bit about me.
And we are really fortunate to have you. I begged Alison to come on. This sounds like, if we're gonna have anyone represent Cco school. It needs to be Alison, with her experience, both as an Investor board member being an operator, being, you know, at the early days of customer success. You know that being able to work with Nick, who's famous? You know, writing a book on customer success. We're just rolled to have you.
Awesome. Thank you.
Yeah. Couldn't echo that. What 2 powerhouses I'm this is. This is wonderful. I'm so excited for this conversation. So let's let's dive right in. We're Emmanuel. Let's start with you. We've been learning throughout Cco. School that the customer experience is a company wide effort. Yet, as we know so many Ccos are the sole ones responsible for it. So
as a Cco. How can you effectively own the the customer experience when you can't really control it?
Yeah. So we did talk about this a lot. And I thought, this is an important topic to go a little bit deeper on and so it's a great, it's a great question, and there's no easy answer. I I think the easiest. The first answer I'm gonna give you is.
I understand that you can't control the customer experience. I understand the customer experience can be, yeah. Influenced by the sales process, by the product. You know, by a lot of things that are out of your control, pricing other things that are, miss, you know, potentially out of your control. That being said, I think it's time to just
Yeah, sort of ignore it so that throw away the excuses. And take the bull by the horn and be the champion for the customer, because no one else is going to be. That's just the reality, right

unless you happen to have and be. And lucky, you know, like Alison was with Nick, as the, as you know, a champion for customer, I'm sure. I was really lucky that Chris Colorado the CEO of toast is a very big champion for
customer. So, but the reality is, it's gonna have to be you as the most senior Cs leader. And so that being said right and you know, the question then, is like is, How do you do it? Right? You know, when when part of your job. I I used to talk about that, you know, half my job was just like the day to day function of running Cs right? And that. And frankly, that's more than half a job. There's that's a lot right. and then the other half is being the champion for the customer experience across the entire company. And it's
it's hard to do, both and I. What I learned was the way I was able to successfully do both is hire incredible leaders for the first right? So that I could personally spend my time on the second. So that's the first thing you're really not going to be able to do a good job unless you have solid leaders, whether those are directors or vps underneath you to handle most of the day to day, so that you can focus on the broad.
But our customer experience.
And then, you know, more specifically, I break it down into sort of like 3 components. The first, you know, in order to drive customer experience across the company. The first is a V, some kind of voc program and we'll talk a little bit more about. I'll break that down later. But some kind of voc program. The second is a aligning incentives across the organization. And then the third is measurement and how do you measure the customer? Experience?
All 3 of them right and you know, have to be.
It's like, sort of frequent blu
often reach. You know, you need to get the data you need to get whatever's coming out of your voc program right in front of the right people at all levels of the organization on a very consistent basis. This is not something that can be like a once a quarter. Hey? Let's talk about voice to customer once a quarter now, like, you know, we're talking every week, every day, if you can if you can do it right.
And I'll dive into voice a customer a little bit more. There's a lot of ways to create a voice, a customer program so that you can make sure that that that customer voice is getting represented inside your organization. But it's your job to champion it. It's your job to architect it. It's your job to figure out. What's it gonna look like? How you know? Where am I? Gonna you know? How am I? Gonna get these insights?
Who am I gonna present them to? How often am I gonna present them? You have to be the champion you have to kinda drive the the voc program and the second is is aligning incentives right? And and this is really critical, because if the incentives in the company aren't aligned towards providing a good customer experience
and everyone's just talking about revenue or something else, and that's how where the incentives are aligned. You'll be fighting an uphill battle the entire time. So a couple of things that I recommend here are, you know, I believe, that every leader in the organization Vp, and above, or whoever reports to the CEO at a minimum should have 10% of their bonus at a minimum tied to some customer sentiment, whatever that is that you guys use, whether it's a score card or whether it's nps or something else.
you gotta put. You know you have to.

Yeah, you have to kinda make sure it hurts if we don't have a good customer experience. When we when we did that thankfully. I didn't get a lot of pushback when I came in. It didn't ha! We wasn't in place, but when I suggested it I did not get a lot of pushback. The! But the thing that instantly happened was, I was getting calls from
product managers, and you know, people in marketing and other places like, what can I do? How can I help like what? What can I do to drive, you know, to improve Mps in our case?
and some of them were like, Oh, this is, it's not. It's not in our control. They didn't like it. But again, we all have to be measured on something, and then
one layer down from like a Vp or a leader.
find whatever metric it is in your organization that they do control. That is the most tied to customer experience. So for for instance, we we bonus every director in engineering
on on reliability and stability, right? You know, because that we knew that would influence customer experience, and it was in their control. We measured the sales team on if on we we one of the metrics that they had was number of customers that had an escalation, or
or or churned in the first 30 days right? Because they had influence on that right and and so there are. There are metrics like OP, more operating metrics
that tie to the customer experience that you can apply to pretty much anyone in the organization is is my belief, and then the last is is, have a dashboard like I, if you don't have one now, just start with something. It doesn't really matter what it is, but have a customer experience dashboard. I'll get more into like what was on our dashboard. And a little bit, but
having a customer experience dashboard, publishing it frequently. A evolving it over time, and you know, if you don't have one, you know I would definitely put one into place as soon as possible, and that won't have just like the, you know sort of the sentiment metrics and the top line like Csat or Mps or other things right on that could be any of those metrics that you think would influence the customer experience right? So we would put in there.
We would put uptime because we knew that that influenced the customer. Experience. We would put number of bugs identified by by the customer. We would put you know, percentage of features that were requested that actually got delivered right? Anything that we think would impact the customer experience.
Was on this dashboard. Some are more engineering centric, some are more classic Cs centric or support centric. Some of them were go to Market centric. But it was on the dashboard red, yellow, green, and that cup published frequently, and again.
The key is you own it. Whether you know I I you know I don't know how to sugar code it like somebody has to be the champion for the customer internally, and you're the best person to do it. So you own it. And you can drive and improve customer experience through a voc program through metrics and measurement and through aligning incentives.
I love that something we say internally. A lot here at Pavilion is when everyone's an owner, no one's an owner, and and the message there is really like. If something, if you know, if you see something that you know needs to be owned, go own it, and if you're not gonna do it. There's a good chance no one else will. So that's a great message, a follow up question I actually have on that one is you know I as you mentioned when you brought when when you look to bring
look to align incentives across the org, I would imagine that there are probably some folks here who might not be as lucky, and you as you were in that. The team was very open to it, and it

was kind of easy to. So how might you think about or approach teams or leadership, who are kind of opposed to aligning those incentives and and kind of challenging the status quo.
Yeah, it's a good question. I I I wouldn't say everybody was supportive of it. I would say Chris was supportive of it, and it kinda ended up being a toss down thing and so my first advice would be.
see if you can get your CEO to support it. If you can get your CEO C. CEO to support, you can make it tops down. And
we had. We definitely had times when you know that part of the bonus was 0, and people were frustrated and annoyed. And you know, like, why should I have 0 on this part of the bonus? But here's my analogy is pretty much. Everybody on a leadership team is measured on revenue. Just just like you just are right like I. I don't think I know any leadership team or some of your whether you're an engineering or finance or marketing, you know, or operations
probably have some part of your bonus tied to revenue.
If you do, why wouldn't you have it on customer experience, too, like that's the other side of the coin. And so that's been my argument all along is like, how can we look our customers in the face or investors in the face and say that the entire leadership team is measured on revenue, but not on customer or not, something tied to customer experience it. Just it's illogical. And then, when you say it that way, there's really not much of an argument back.
M-
I I love to chime in on this topic, too. I I agree with everything that's been said. I think fundamentally it's very difficult and risky to be a change agent in companies. Mainly because most people don't like change, even if they're working at startups. And they say they like love. The thrill of it. They probably don't like change, especially if it's coming from another direction and not something that they're driving.
So you know, I just frankly, I have seen a lot of change. Agents fail, many of them. Cos, who are talented people, and you know they there, there's actually this period, maybe like 3 to 4 years into our journey at game site, where finally the Cco role was becoming normalized, there were, like many Ccos. It's actually shocking that like before 2016, there were almost none but
There were a number of people who were like in Cco. Roles for a period of time, and what we would find is that after 18 months many of them would leave their companies, and you know, I think many of them frankly, were probably fired. I think others were just like super discouraged. And you know, often with the conversation went something like, I need to go find another company that, like actually values the customer experience. And you could tell, just like the evangelism internally, that they were doing was really difficult. I've also found that, you know, the same difficulty and change agency exists in like other types of internal entrepreneurs, people who are launching new product lines or like running, you know, an acquired business within a company. Or you know, I mentioned this
common transition from perpetual licenses, subscription in larger companies. The people who are like spearheading that new like Sas or subscription initiative. They're in a position of change agency and like often fail, even though they're really talented. So I I think this is is just as a manual started with, I think this is just, you know, really hard. I think that one of the the sort of like key to all of it is.
First of all, I mean, you do have to own the change, because that's probably why you were put in that role so like to Carly's point, you know, if no one owns it there, everyone knows it. No one

knows it. Someone someone has to own it. And there's something like wonderful about being like the tip of the spear. But then you have to figure out how to like.
get everyone else to own it as quickly as possible. So it's almost like you gotta be the change agent. But remove yourself from that role as soon as you can, and the sooner that you can do that the more you sort of guarantee your own longevity within that organization. And it's almost like, you know, when you're a leader, they say
work so that you become replaceable, because, like, if you're not needed, probably your direct reports are stepping up, as the Manual said, you know, and you can move on to take on other like Brander, more exciting things. I think it's the same thing, the change agent you gotta like make yourself
replaceable. And I think you do that by, you know.
helping people understand why it's exciting for them to own some piece of it.
And you know that for for the the change. Agents that I've seen have been successful. You know that that's what they do.
Love it.
Yeah, that's great. That's a great, great way to think about yourself and your impact as being a change agent driving that change. And then, yeah, a great, great point of like, once you once you feel the momentum and kind of the wind at your back. So that's your that's your time to kind of hand off
the responsibility and and go focus on whatever the next change is. Gonna be so, Alison, I think you have a a really unique perspective. I know you were talking about how difficult it can be for for folks to be change agents in organizations where there's that there's a lack of customer centricity, or or there's there's just resistance to that change. So how do you look at or evaluate a company's customer centricity.
So. I am mostly investing at the early stages, although I can speak a bit to the later stages as well. In the early stages. Often there isn't someone in customer success, and that could be okay. There. There can still be like the kernels of
customer centricity early on, and important to look at. And there's there are few that I tend to focus on especially for preced and seed investments I'm looking at. Does the founder deeply understand the customer pain point and usually what I'm looking for is someone who has experience that pain point themselves. So people call this like authenticity to the problem, like the founder, has
experience this problem authentically first hand, and therefore they like, have really felt the pain that their customers are going to feel so empathy is sort of an essential part of like the DNA and the mission of the company. And there's an intuition that comes from that feeling of pain. As to what product to build.
how to shape the go to market, how to run customer programs and things like that. So that's that's one. I also look for founders who do sales themselves. And also know the detailed history of customer relationships. You know their number I I invest in a lot of technical businesses. So I've seen a lot of examples of.
you know, founders who are, for example, engineers who are looking to like. Hire someone to do sales for them or do marketing for them. That to me, signals that they it's possible they're just terrible at like communicating with people. But it's also possible that they don't really understand the problem that they're solving. Because I I find it, people really get the problem that they're

solving are the best people to communicate and sell how to solve that problem, even if they're not.
you know, an incredibly, you know, naturally born communicator. So that's 2.
I also look for founders who learn from customers and iterate really quickly, based on that feedback. You can tell they have, like a deep sensitivity to almost trigger happiness to customer feedback like they hear customer feedback. And it's like immediately they build that thing overnight which is not sustainable. I I imagine I'm here, you know. A lot of people on the call are like, Oh, my God! Like that!
Customers are not always right. But but I think in the early days it's it's very important to like kind of.
you know, lean in that direction I look for certainly in very enthusiastic customer testimonials, I look for strong retention in cases where there's like enough traction for that kind of data.
And I look for a really strong feedback loop between customer facing people and the product team. Because that feedback loop, if it's systematized, is what's gonna create like very fast and deep product market fit.
Which is really like, I think any chief customer officer would tell you, like the best kind of company that you can work at is one word of the product just works really well because it just eliminates. You know, a lot of a lot of banks for customer facing people.
Yeah, that's great.
speaking of of some of these, I think. That you know.
as a early stage investor working with founders. Obviously you would hope, as you said, that they have a really good idea of what the customer is looking for their
selling to them. They're marketing to them. They're hearing their feedback. But as we know as we scale you lose some of that direct connectedness. So, Emmanuel, I'd wanna circle back to what we were talking about before, as it relates to voice of customer program. So what? What are some of those tips? Around getting started on a voice, a customer program, driving empathy for that customer experience. And then.
you know, rolling that out and enabling within the organization
great.
Thanks. So if you don't have one, the great thing is that these programs can evolve. You can start really small. They don't have to be
you don't have to have a full time person driving it, you can. It can be a project of someone part time at the early days. Who's doing it as a side project? You know, over. Eventually we did have a full time person running like our for customer experience and voice to customer programs, but not not on day one
so I think the first
tip I have is a V. The purpose of a voc program is to distill all the signals that you're getting through so many different sources down into a couple of themes. Right? And those things may change over time. But to distill down into those themes, and the reality is, if you don't do that you don't sort of distill all that insight. There's a really large chance that you could be chasing you know, chasing ghosts right based on like the last person you talked to, or the loudest customer, or the biggest customer, or whoever the CEO or founder just happened to bump into. I mean the number of times that I would get calls from one of our founders or CEO that says, Oh, I just talked to a customer. And we really need to solve this problem.

and maybe but actually, maybe not. Maybe that was just that one customers problem. And we've all seen that happen before where the loudest voice, you know, or the loudest dollars, or whatever can can speak. So the purpose is to try to
get insight. That is representative of your entire customer base. So we started. I started with support tickets, as like the the very first place I started just because that was where there was the most data, and that was what was the most representative of every customer.
And so we just started analyzing support tickets. And seeing what kind of trends that we saw. We you know, we also implemented, you know, more transactional
customer surveys both csat and Nps where we can get them on a more of like versus Nps, being something that we got
annually. We implemented a way to get Nps more regularly. And so that was just kind of how we started. We just said, Alright, what's what's a set sentiment metric that we can use to get started? And where do we have a lot of? Where do we have currently the the most data, and then we just started sharing that data. And we started sharing the insights. And we started, you know, boiling it down into a couple of themes. And then what we quickly realized is we needed to share that data, both
at the most senior levels in the organization. But we also needed to share that data all the way down into the organization, and so then over time, we just started formalizing how that data got shared with multiple audiences. And we created
I don't. I guess you can call them like affinity groups or things like that where you know lower in the organization we would share. We would have teams and Cs meeting with teams, mostly in R&D, and also in in in go to market? And you know that. And they would talk about a particular product or a particular topic. And you would get the people who are like closest to
the ground. To talk directly. To folks in, you know, who don't always get the voice of the customer first hand because they're not always talking to customers. We implemented what we called a customer Empathy program, where we worked with the heads of engineering and R&D to have to find opportunities for every product manager, every engineer
to spend a half a day with a customer. Shadow them, etc. We, you know, brought in, you know, every week we had like a lunch and learn type of stuff where we would have a customer come in and just talk about. Not, you know, their experience with toast, necessarily, but like just like, what's a day in a life? What's you know? Like anything to build that empathy anything to get whatever data that we had out. And then over time.
right? That you know, the the dashboard got richer. The insights got richer, because we added more signals like we put together. 2 different
customer advisory boards, and I would definitely recommend, if your customers are all like pretty homogeneous. They all kind of look the same. You probably don't need to. We needed to, because there was a really pretty big difference in how our Smb customers versus our enterprise customers. Looked at toast, and I didn't want one or the other to get too much weight. And so we had an Smb Advisory Board, and we had a
an Enterprise Advisory Board, and we picked customers on purpose on the Advisory board who weren't all uber fans of toast some of them were we had. We even had a guy who tattooed toast on actually got a tattoo with toast. Some of them were uber fans.
others were really critical. And not not uber fans at all. And actually, we even you know, we wanted to. We wanted to pick people who had had escalations, who had threatened to churn in

the past, etc. On the Advisory board, but we looked really far and wide for data. So not only operational data like your all your support data, you know. Yeah, all your Cs data, but also sentiment on social media sentiment in your community. And we just aggregated all that. And every month we're like, okay, this is the theme this month. This is what you know customers are talking about.

And the most important thing about a voc program is that you don't just push all the data and say, Okay, here's what our customers are talking about. This is the voice of the customer. They have to have an action item at the end of it. This is what the voice of the customer saying. So, therefore we are gonna work as an organization on these 2 things this quarter this month, whatever it is right, get commitment, that those are the right 2 things. Everyone agrees. These are the right 2 things that we need to work on to improve the customer experience.

And then, as the leader, drive that change right. And, as Alison said before, right, and whether, if that change has to be in product.

then, you know, get the head of engineering to support it, and partner with the head of engineering or the head of product, to drive that change internally. If that change needs to be in sales, you know. Work, partner with the Cr to drive that change. But a absolutely, you know, it's all about collecting the data, synthesizing the data most importantly into themes and trends and then communicating it foreign and then making sure that action is being driven from it.

Great I I don't know if you noticed, but I saw a lot of heads nodding and some chuckling when you mentioned

your whether it's the loudest voice in the room or your CEO who's helping

drive your priorities? It's so. This definitely sounds like something that that resonates with folks here.

We all know that we've all gotten the phone call from the founder of the CEO. So I just got on a call with a customer, and we gotta go work on this thing. And you're like, Okay, maybe.

So.

We? We call it shiny object syndrome. We're just. You're you're chasing the next best thing. We had a question come in, Emmanuel, from Alejandro, who asked, Have you found a different approach to a customer empathy program and a world post pandemic, where perhaps, customers are not used to engaging as much as they did before.

No, I I didn't see

a major difference. I honestly think that

most of your customers and listen. They made in a decision to invest resources and dollars into your company. They want to see you succeed.

And so if you call in and you're like, Hey, I wanna make sure that the people who are coding and the product managers who are making product feature decisions

really understand your world and your pain. And and like, I just can't imagine anyone saying No, whether that's virtually or whether that's in person. I think you can. You can make it happen. I mean, during the pandemic. We did have to do all of our V, our our advisory boards virtually that they weren't nearly as funds. We didn't have cocktails and other things, and you know and socialize after. But they were still productive. They still, they still met the the needs for us, and we still got all the insights that we needed to, even if they're virtual.

Rape.

Alison. Something we hear a lot about from pavilion members is

how powerful it can be to get into the mind of a board member. So I'm curious to hear from you. What you hope to see when you're engaging with the Cco. And and what you feel is really critical for a Cco. To demonstrate today.
I thought it might be useful to talk about a framework that my former leadership coach put together. If you ever have a chance to meet David Lesser. Take it, he is Yoda a guru
just like a sort of a philosopher for leadership. He put together this framework so I don't know if you can buy this. But maybe maybe if you checked out his website, it would be there. I'm not sure. Basically, this trinket shows 4 different
hours that you can have as an executive or 4 different kind of areas of competency and regardless of what function you're leading, or whether your CEO or otherwise. I think this framework is very useful, so I'll sort of speak to it. With respect to Cco's
so the first category is power. Represented by the warrior. You can start to picture like what this means. Something I look for in execs generally is clear, fast, intense communication, sort of like a representation of your warrior. Energy shows that you have a lot of horsepower like intellectually, and execution wise?
Certainly. Communication, I think, is known to be an executive competency. But I think there's a very like particular kind of communication that board members tend to really appreciate. It's like concise to the point, very clear. You speak intensely, which, like communicates a sense of urgency to them, which means that to them that you care about their their money, especially if they're like Vcs. So that's one
Also, under this warrior category, I think you know, hustling to experiment and sort of executing on a growth. Mindset is really valuable, meaning like
hustle to try things and see the impact on metrics. And if you're like, if you're not seeing an impact on metrics like, have the urgency around
changing your experiment finding a new experiment.
The second category is the seer.
or or it's called awareness, but it's represented by the seer.
I don't even know if I should hold this up. I'm not. You probably can't even see it. But the seer is basically like
the all knowing oracle the idea has you're you're executing. You're you're demonstrating analytical ability. So a couple of things in this category that, I think are important for Ccos. One is you having a deep understanding of how revenue is generated at your company which allows you to understand the strategic value of your work? And your team. Basically, you're putting on your CEO hat. And you're thinking about, why should the CEO? Why should this board invest in my function.
So and and that that understanding, I think, can also lead to a lot of operational rigor where you show that you have an a strong understanding of how leading indicators like
Csat, or, you know I don't know. Name your operational metric, how those lead to the lagging results of revenue, and then increase in valuation for your company, which is ultimately, from a financial standpoint, like what matters at the end of the day?
There's a third category called confidence purple, represented by the queen or king
and the idea here is is you know you're inspiring people with your confidence.
leadership, you know, inspire people to get from Point A to Point B, which, if you're a change agent, is also really important, you're able to chart out like what point B looks like where you are

today. Why, it's valuable to like. Go on this journey with you. And also, you know, you can sort of pick up team members and also kind of pick up customers when they fail. Right? You're the kind of person who can lift people up, which, again is very important when you're on this difficult change journey.
and then the fourth category is something called connection, which is represented by the lover and extreme symbol. But like, you know, you can imagine a connector. And video is to have like emotional intelligence which allows you to connect with clients in the case of a Cco or customer facing leader and also, you know, the ability to listen really well. So you know, be able to hear feedback
that you're getting from a lot of different kinds of people which you definitely will if you're a change agent, you're gonna hear feedback from every function. You're gonna hear feedback from your CEO. You're gonna hear feedback from board members, hear feedback from customers, hear feedback from your team members, and you might feel like you're inundated with it.
But you know, if you start with the sort of like ability to be open to others.
by connecting with them that can give you the data that if you put your seer hat on, you can then make smart analytical decisions to go like shape. Your strategy.
Yeah.
I'm gonna go check out, David. That sounds amazing. I wanna go check out his website.
I know I took a full page of notes as you just
through all of that. So I'm.
Actually, I wrote a blog post on on this framework, like with him, which I can share with you all, so I'll see if I can dig it up before the end of our session.
I think that would be awesome. Yeah. And if if not, we can, we'll send it out to students after as well. I guess on the not quite flip side, but taking that kind of back to the operators. Perspective, Emmanuel. I'm I'm curious your you at toast. Where you obviously had a lot of success.
What? What sort of topics did you find that the board of toast was was really interested throughout your high growth years there. Leading customer, success.
So as we talked about in, I think it was Class 2 or one or 2. It changed over time, depending on what act we were in. So if you guys remember the concept of the acts right that we talked about so you know, a early on it was.
you know, they cared about things that were gonna impact revenue to be clear, right? To be honest, and so, you know, I I spent a lot more of my time on the onboarding funnel. Time to go live book to live ratio. You know. Kind of. You know. How quickly were we able to get customers live so that we could start then we could start recognizing revenue
and then churn. And even though you know and this is public information. But even though Cha, you know, toces historically had very low churn, and and still does. You know, even in the a early days we would go through every every single customer. We would do an analysis on every customer, a deep dive, a retro, and every customer we would look to see if there were trends among the
you know that, you know at a quarter the 5 customers that turned, or something. And even if the end was really small. We still spent a lot of time, and the Board wanted to understand that they wanted to understand. You know, are there any trends? Are we seeing anything, you know, that

could become problematic? Later. So I would. I would absolutely present churn trend data. And then
we they wanted to over time, as we you know, as we continue to grow, the Fo focus started to be more on customer sentiment. And so we would really dive into. They wanted to see what we use. Mps and I could, you know, we could have a whole session just on the pros and cons of Mps. There, I don't think there's a perfect customer centric metric to be honest.
there isn't one and so kinda have to just pick one and go with it, and you know know that there's pros and cons that come with it and and know that it's a proxy. It's not perfect.
but we use Mps and so they would absolutely wanna understand? What was driving Mps? What were the biggest contributors to nps. What were some of the themes that we saw? both positive and negative, and and then you know, what were we doing about it.
and that. So that was the. And then, as that voc program as that matured, and as the dashboard I talked about as that matured. Then I was able to actually start presenting a full dashboard right? And a a. And depending on the board member, you know, some of them would really go super deep on. Oh, okay, you know. Looks like.
you know. Looks like I don't know we're not. We're not releasing features fast enough, or we're having too many outages, or whatever it might be, might and you know they would want to dive in like, what are we doing about it. And the great news is by doing that I was able to get the board
to help me
drive
other leaders to own the customer experience and not just me. And cause they would be like, Okay, you know, head of engineering. What are you doing about that thing? And like, you know they recognize that I can't
change, you know. I can't work on stability or reliability, or whatever it might be. And so by I really use the Board to help get support from. And and I would spend, you know, the Board members that seem to to
really gravitate towards the customer experience. I would meet with them offline outside of a normal board meeting. And I'd say, like, Yeah, I could really get your help, you know with, you know, you know, making sure that we're all really focused on this one thing, you know. And I wouldn't do that. Obviously behind
the Ceos back, it would be very much in support with other CEO cause. That's that would be a career limiting move. but but you know, I think enlisting the board is another yet another person that you can enlist if you're presenting them with the right stuff.
Yeah, I love that
helping helping your board.
helping them understand or become empathetic for your customers, so that they can be someone who's in your corner as you're being that change agent and and helping you kind of drive drive that momentum throughout the organization.
So I'm sure we I mean, everyone here obviously, is looking to be the best Cs leader they can be, and and the best Cco. They can be. But I imagine there are many folks on this call who one day either currently are, or one day hoping to be on a board. So I'll send them. Curious. What value you feel a Cco. Can have as a board director.
Yeah. So one thing I mentioned earlier is that there's

I I think, a a crucial insight that Ccos have, as as in many cases, people who have helped companies undergo the transition to Sas. This is like mostly larger, like older companies, right? That we're not born in the cloud and if you've been through that before, there are many companies that you can help go through it now.
And sometimes they are software companies that have gone from on premise to the cloud. But there are other companies like John Deere, for example, and, like the agricultural equipment industry that are rolling out these recurring revenue business models, or
otherwise, like, on an ongoing basis, tracking data about how their equipment is being used. And there is an analogy there, you know, to subscription revenue in a Sas context as well as like usage data in a Saas context. So I had a call like a year ago, with with literally like the person who was now leading the kind of recurring revenue business that John Deere, who's looking to hire their first customer success leader right? John Deere could, I don't know super well, but probably they could also benefit from having
having a former customer success person on their board, because that person has probably, like seen that transition to like embracing, recurring revenue.
You know, I think in in these big transformations, Morgan, there's lot of by definition a lot of change. It's really valuable as a board member to be able to educate executive teams on what potholes to avoid as well as what best in class looks like. You can sort of lay out the standard while also, you know, helping them avoid mistakes that you've seen in other places.
As I mentioned earlier, many Ccos fail in these transformations, and many of these, like Sas business units can, like, you know, have rocky
roads. And you know you, as a board member, can provide air cover for the change agent who's spearheading those initiatives because you have sort of unique vantage point where you can say it's not the person that's failing. It's the organization, because the organization needs to embrace change. And it might be that this change agent is
best in class executive and doing their best and you know, we need to provide them with more support. So you know, I I think that actually can be an important role of a board director is like helping to provide context for executive performance.
in addition, I think Ccs can add a lot of value on boards, because.
as Emmanuel has described a lot in this conversation, and I'm sure the rest of Cco. School like this role is inherently a cross functional leadership, one in a way that, like I think, most other functional leadership roles are not like in in many other functions.
You can mostly, although certainly not exclusively, operate in a very heads down way, do your thing, and you will be considered successful and and rewarded for that. Obviously, in the Cco role. You can. You can't at least like the way that things currently are like, you can't just do that. And I think that that cross functional nature of the role makes it a lot easier for Ccos to wear the CEO hat and wear the board hat because you kind of automatically. Have you know that cross functional perspective company, wide perspective? I do. I have noticed, though, many cos thinking of the customer experience as being in opposition to revenue. Like, you know. Oh, my CC. At my CEO, they don't care about the customer experience. They only care about revenue where they, you know.
I think a lot of folks kind of see them as in conflict.

I think, for people who wear the CEO or board hat more, they're seeing customer experience as a crucial lever for driving revenue, for driving the value of their stock for driving profitability as well.
And so I I think that's an important transition to make as an executive like where you're not putting yourself in a position at the company. I mean, first of all, like in your Cco role, where you're not the person who everyone thinks is trying to like hold them back from driving growth or like driving value for the company I like I noticed a lot of Ccs being in this position like that's a great way to be hated and also like considered to be like someone who doesn't get it right. Like I I think the idea here is that your role matters. Customer experience really matters, but it matters in service of something else.
And certainly there are like other values. The company might have like treating people well, expressing empathy for our partners like being a good human. Those are all really important things, but you know I think most the rallies most Ceos most for direct boards like they're looking to run a business drive shareholder value. So
to make the step from being a Cco. To being on a board. It's really important to like kind of like make that make that leap and then I think the final ways that way that Ccs can really add a lot of values. Board director is that they're just like equipped to ask deeper questions about the customer journey. You know, like that, you can during like the Cco section is, and the sales section and the marketing section. The board meeting like you can be asking questions like, you know?
how you know.
I mean, I'll there's like a list like a hundred questions that you could be asking that like, you might have a, you know, unique perspective on
So yeah, I'm I'm sure. By the way, there are many other ways in which, like Ccos can add value on boards. And I think we're seeing this happen more frequently. We're like Ccos are
Taking on CEO roles, and also taking on board Director roles. And I have a feeling that trend will continue.
Yeah, I'll first of all that was amazing. I'll I'll echo a couple of things that you just said Alison. Is that first. Is that the very it. The very first I was on a bunch of advisory boards. But the very first true board of directors role that I had was with a public company which seemed is so
random. Right? That's usually doesn't happen it usually, it's, you know, a smaller company, or whatever. But that might. They were public when I when I joined and it was like, and it was an an a non traditional non tech company, and that was like they were looking for 2 things. They were looking for someone who really understood customer experience and someone who didn't come from their industry like to shake things up a little bit, so I think that's a great place to go look for for board seats. And then I
absolutely loved what you said about
about you know the the at odds between revenue and customer experience. it, you know, I was actually just yesterday talking to Jeremy. On this call, and I suggested, go to the Cr school. If you're part of Pavilion, it's free.
Go to Sierra. If you haven't go to Sierra School like you
like. Immerse yourself and everything revenue. I had the advantage that I ran sales before I ran Cs, so I never was seen as that Cs leader that was trying to, you know, prevent revenue in any

way, you know, or didn't care about revenue. I definitely saw that the customer experience was in in
in in support of revenue, and I spend a lot of time with sales. Reps like, what can I do? What can I do to help you? You know you know, maximize your territory. What can I do to help you sell more? A. And if you just if not all you're gonna have come from. Some of you're gonna have come from a more of a service background or an operations background. And so just. My advice would be like, immerse yourself in everything. Revenue.
I love that I love that idea of going to Cero school. I also think you know, this might be like a provocative topic to raise in like Cco. School. But I do notice the Cr role becoming a lot more common. And the cr managing customer success, and also sales and professional services, sometimes like a couple of other functions.
And you know, frankly, I'm not like religious about this like I. I spent, you know, 6 years of my life like promoting the Cco role. I still think it's really important. I also think there are a lot of companies that are like well suited to having a Cro for variety of reasons, particularly product like growth companies. I noticed that, like being very helpful
and I think Ccos can be great candidates for crows. It it might be like for many of these people on this call, like the next step in your career is like, maybe be a Cr, and like manage sales. Also, you know, like Manuel made the transition from sales to customer success.
Maybe a lot of people will make the transition from customer success to sales and and we're, you know, running, running both. So I think you know, if you can kind of educate yourself again on how, how exactly like your work is driving revenue. That's a great step, potentially like toward taking on an even broader, broader scope.
Yeah, and I. And there is a trend. And we actually did a survey of this group. And if I recall when we did it
a lot more than I expected of
this group reports to the Cr. And more than I expected to see. It's a growing trend, and I think you know, having one leader responsible for
you know, the entire customer journey and all revenue, I think, is fine. I think the problem is that often that person is often comes from a classic new business sales background. And that's where it becomes challenging. And that's where there ends up being friction. Not the notion that there shouldn't. You know that there can be one person? I think that's fine in the in the case where that one person does come from a classic new business background.
It's just, you know, it's just gonna take more education and make sure that they understand how how
the customer experience can make or break new business. Once I understand it, they're going to be champions, for there was a question from Rob about like, how do you handle the you know? How do you put to bed the competitive
nature that sometimes you, you know, see? And the way I put it to bed was, I mean I, the Cero and I were really close. Was, you know, like
a a am I getting in the way of revenue, or am I helping revenue? If I'm getting in the way of revenue, what can I do? Right, you know. And there were times when he would say, you know, right now, like, you know, there were periods when our support, you know, wasn't. As up to. We transitioned to offshore, and there was. We had. We struggled in the early part of the transition

and you know, and it was causing more escalations that we're going to sales, reps and distracting sales reps from doing their job. And so I was like, alright like
like, that's not me. I gotta fix that like I I gotta provide the last thing that you wanna be is someone who the CIO thinks is You know that that your department is getting in the way of revenue and so just being just, be an advocate for revenue as much as you are an advocate for customer experience.
Could I ask a quick question, is it okay?
Course.
Yeah, I I would love to get both of your insights on this for me. I really well, I I think of any executive in a company as being a business leader, but especially in Cs. I see them as business leaders throughout, because they're they're needing to focus on both the customer achieving their business goals and then connecting that back
to achieving the business goals of their own company. And so to me, it's increasingly important that the whole Cs team thinks of itself as business leaders, and I'm sort of curious
since you've been both on boards, and you've had to report to boards. You've been in different areas of the business. Alison is a Coo, and Emmanuel as
as a sales leader. Just how have these different roles informed your understanding of business leadership. How did that inform what you did within your own Cs teams as well as how you reported on boards. And you know, just basically all the circ full circle. Just
very curious about that. Your perspective.
Awesome. Go ahead.
I'm happy to. Sorry.
I so actually like. One thing I I didn't share was that before I was at gain site I was actually in private equity investing. I was in like very different world doing leverage buyouts like during the great recession. And
so and actually we did. We did a few of them shockingly, even though like deals were not getting done that back then. But the point was that I started, and before that I was in management consulting, I started my career
thinking about the company from a bird's eye view. So sort of understanding ultimately like what matters is equity value
and
you know.
And and there are many other things that can inform that right? So like literally, we'd be building the Pnl model for a company, understanding how that generates cash, flow, understanding how cash flow, pays down debt, and then, like, increases your equity value, and and also how like valuation multiples play into that growth as well. So
When I eventually like, entered an operating role at Gainsight.
it was almost unnatural for me to think of myself as just in this.
What like you could have seen is just like a narrow role within a company where you just have to kind of like focus on your lane and, like
other things don't matter. I I think, like I was more interested in, like how the company overall was growing, and I took on customer success as one of the teams I was building in in the early days, because it was like the next lever for us, and it was exciting to be like pulling a new lever.

so, you know, and and then over time, like, you know, took on other. You know, there. There were a number of other teams like I took on. So I I thought, it's like one of the many challenges that I could. That was that was fun to solve and also like, could ultimately, like generate equity value for the business. And so now that I'm kind of like back in an investor role over this time in a Vc
context, so like investing in startups instead of like bigger cash generating companies. And then also on board, it's kind of like coming back to
a bird's eye. View a bit. And so
you know I may maybe that. What could people learn from this? I I guess, like the one idea might be to try to see if you can like get that bird's eye view from other activities that you do, whether it's going to cr school, as Manuel said, or like doing other other programs that can expose you to different roles. And also the CEO role.
Actually 1 one example. Along. I don't know if they're like still a big deal. But A long time ago I participated in a a vist PE executive peer group.
pavilion, actually, might I? I don't, Carl, you. I think you might have spoken about this, but in any case, like the idea is to join a peer group of executives across functions from different companies who meet monthly and like, you know, you sort of take turns sharing a challenge that you have, and getting advice from the group about how to solve that. I learned so much from those exec peer groups about how other functions think about things, and how other company, what like, how other companies are different from
from mine. You know, also taking on advisory, even if not if you don't take up a board role. Taking on advisory roles can be great. First step, because again, you can go deep into another company and see how they're similar different from you
in in particular. If you're advising, you know CEO or founder, you're working with some another person besides your own CEO, who has a bird's eye view. You can also become, you know. events or partner, or part time operating partner at a Vc. Firm. They often just want executives to kind of like rotate through their quote, unquote stable. You know, you might spend 6 months or a year, you know, helping out their portfolio companies doing, you know, one or 2 calls month for half an hour an hour with
helping, you know, helping them like set up their customer success function. You could also think about. If it. If financially makes sense for you, you could think about angel investing or think about investing in a Vc fund, and that gives you exposure to new companies. So yeah, I think just broadening your horizons can make a big difference for your perspective. And also how you think about your career.
Oh, Manuel, you're on mute.
The only thing I would add that you didn't already say Alison is
You're
finance can be your best friend. And
you know, I think probably the biggest change I came. I did not come from, you know, an investing background, except I was. I was an operator from day. One
I I did. When I was getting my mba I got my Mba from Nyu. I didn't double, Major, but I'm one of them. My majors or focus areas was in finance, not because I have any in any interest in ever like going into Wall Street or ever being a Cfo AI, actually, my husband lasted. I can't even

balance the checkbook, and you know, but like it was because, like, if I'm gonna be a business leader. I
I gotta understand, like at a detailed level, what goes into a Pml and what goes into a cash flow and a balance, you know, cash flow statement, and a balance sheet and etc. And so I would say to me that was so like the biggest difference was when and the biggest shift for me, and when I felt like I was ready to be on boards, and I was more valuable on boards, and I was a more valuable executive, and I don't remember exactly when that shift was. It was pre toast, but
But it was when I started caring about when I really started spending more time with my finance counterparts.
and started really, really like truly understanding what the levers were. Across the entire P and out like exactly what goes into gross margin. And what's what's you know? What's hurting our gross margin? What's helping our gross margin? What are the components to it? What's trending, you know, just really diving deeper into it. And I'll say, when I first was on advisory boards, my, you know the kinds of questions I would have. We're really operational, like.
you know, I don't know. Like, Tell me about your comp plans for your sales teams, or how is your sales team structured, or you know, what's your sales process look like? I don't know. I was looking for more operational things. And now you know, I'm like, alright. Let's dive into gross margin. And so it
But you can do that, as as you know, like
many of you probably carry, you know, manage a pretty big budget and you know, if you're managing support, that can be one of the the larger organizations in the company. You know, you, and most likely we, as we talked about cogs versus Cac. In the very first class, most likely a decent part of what you're managing is is cogs and
which can have, you know, really great influence, positive or negative, on your gross margin. And so like, be that business leader. Be that Cfo. Leader spend. If you don't. If you're not super good friends with your Cfo. Become best friends with your Cfo even if it's just for your own professional development.
Mark had a suggestion for maybe next semester of Cco. School to have a Cfo guest session. Point. I do.
Yeah, I love that idea.
And Jen to answer your question. The next session of Sierra School is, gonna be in Q. 3 and to your point, Alison. That is, actually, that would be a really great opportunity to build some of those peer groups as part of the cohort experience within Sierra school. You'd be
in a group with other. You know, vps of sales, heroes who are going through the content. And and I I love that a thread. Throughout this whole conversation has really been about obviously building and and having empathy for your customer, but then also having empathy for
those who are working with within your organization. And and I really do think that the more you understand the motivations behind someone's role and what they're looking to achieve, and the more you can empathize with that the better. You can collaborate together, and and obviously it works best when it goes both ways and sometimes it will, and sometimes it won't. But I think, yeah, understanding what your peers around you care about and and aligning with that is is incredibly important.
Yeah, when.

One thing that it noticed is like, really, and I think part of it is just where we are right now. You know, with
you know the funding and the economy, and you know, etc, and and you know everything. Kind of being squeezed. I you know, even, you know, 2 years ago, 3 years ago, anytime I was with my Cs peers. The conversations were around. Things like, you know, how do I best align with sales. How do you comp your Csm. How do you do? One to many? You know, when you know, etc, etc.
And and I love. I love the fact that the conversation is now shifting. And we're having conversations in this school about cact versus cogs versus, you know, like, it's just a different conversation. And I think that's really healthy for the the businesses and also very healthy for all of everyone's careers.
Yeah. And I actually on on the subject of
you know, being aligned to revenue being aligned to cost. I remember when we started out at gain site, being aligned to cost, was considered to be like sort of a liability, and like a downside of the role.
And now that we're in actually like a different economic environment. I'm not sure that's totally the case. I think another reason why it's not the case is that the whole promise of AI is that it? Dramatically it's supposed to dramatically take out cost. So like the conversations that are happening in board rooms now are all about. You know, how do you cut costs for like increase productivity by 50% to X, you know?
and I think, like, if you can become one of those people who's like I can do the same job. But with like
half the team, or more likely, I'll never have to hire anyone again. That makes you look like a really powerful leader. Nowadays, I'm so when I look at companies to invest in.
I'm often looking at companies that have 9 people, and they've scaled to 5 or 10 million in revenue.
Which is like crazy, I mean, like a again site when we had a million in revenue when I joined. I think there were already like 60 people at the company, you know, there was like an engineering team of 30, and like I granted, like I think we'd over hired. But I don't think that was like so far out out of the norm back. Then. Literally, there's a company I'm looking at investing now 9 people, I think, around like 7 million revenue. When I invested in Jasper they had 9 people. They were 40 million in revenue.
you know, companies can scale so much more quickly now. Partly because AI, partly because I think best practices for how to grow and run a company had become just so like so much more improved and just like popularize like there's so many really skilled people who like know how to do things quickly and leanly.
So you know, and and what like. There's, by the way, like amazing advantage to having a smaller team. Apart from the fact that it's lower cost, which is that you can be so much more nimble. People are happier on small, on smaller teams you can
coordinate more easily get aligned. And on the same page more easily. There are fewer political battles. People understand where they're coming from more easily, which is subject you're just talking about like having Carly having empathy, for, like other people, you can be in the same room potentially. There are fewer like big meetings that you have to have. You can make decisions faster. You can feel just like closer to people, you know, running a small team.

I think, can be just frankly better. And I think this is bit controversial, because I think so many people that I know, and including myself like, have thought about their careers and have measured their their careers in terms of like how many people they can manage.
And what I would say is, actually that mindset is a liability now, and also will disqualify you from a lot of jobs as an example.
There are few series C companies in my portfolio that from super fast, with very small teams they're looking for, you know, Vps of X, and
these Vps are gonna be managing very small teams. And so like when they were, you know, when I was sort of tapping my network, for, like people who had had experience at the C series, C level, those people would say, well, like, I wanna lead a big team. And I'd be like, well.
this company's not it. Then you're gonna have to go to like some big public like old, older school like public company. Now, if you you know, if you wanna like, continue to just run a big people organization. So. And and I, I would just add, like, there's a way to sort of continue to lean into having great leadership, being a great people leader with a smaller team. You your. The quality of your leadership is dependent on. Like how many people you can lead.
Do you mind if I jump in with a question.
Yeah, no, please. We have like, 10 min.
Alright, and I've noticed, kind of throughout my career. Post sale teams have taken on more and more go to market responsibilities becoming less of a stakeholder and more of an owner in bringing new kind of features and products to market, would love to get your thoughts on like. If this is a trend you're seeing across the board. If if you view it as kind of a a core part of kind of the future of a Cco type role.
Yeah, absolutely. I mean, I think this is
I would say, and again back to the acts that we talked about right in sort of for one of the first acts that toast my executive best friend was the Cr. And then it pretty quickly shifted to the head of product, and it was all about right, you know. Can, how do we launch products faster? How do we educate our customers? How do we drive right attach rate? How do we drive adoption? And
I think to the you know, to the extent that you're as a Cco. Your role isn't managing customers, and if that's how you define your role. Then it's really narrow, right? You know your role is right to, you know, to help get product out the door to help drive revenue all the things that we talked about, which is why, as Alison said it, I I think this is the a role that is
very well suited for board and and coo, and CEO positions, and so you know we've been talking about. Get be best friends with your CIO. Be best friend of your Cfo. We also have to be best friends with this, the chief people that. That sorry, the chief product officer, or the head of engineering or the head of R&D, and that's I think that's one of the things that I love
about and why I switched was cause I you know I felt that driving only sales was limp, very, very limited. And being a Cco. Gave me, you know, influence in launching product in in revenue, in customer experience, in kind of everything, and set me up better for being on board, and maybe eventually a CEO.
Great what? I I know. Yeah, we have a few minutes here. We can probably take a couple of questions, so we can open up for QA. If anyone has any questions, feel free to drop them into the chat, or you can
come off mute.

I have. I have a question. Thank you so much. Alison and Emmanuel, for the time today. I lead customer success at a startup called Fresh paint, more at series a series B, like growing really fast.
and my primary mandate from the board is to keep
our focus on building up the product value and not on charging for services and not on like worrying about the cost of customer success. I've been in the place where you're.
you know, Series D, and you're doing cost cutting and customer success. And you're like very hyper focused on the cost to serve the customer. So I'm curious like if you've seen, maybe benchmarks, or like where north stars should look like in terms of keeping the cost of the customer org aligned to the revenue, and like how you kind of what's like your mental model thinking about that.
Good question for Alison.
You know. I have not seen those benchmarks, but that if you have Vc. Investors, I think I've heard of your company. You probably have Vc investors. You know, you might wanna just ask them for like benchmarks like that. They they might gather them. I, you know my mental model is thinking about a few examples of series, a companies that are growing fast.
you know.
one that comes to mind has
to 2 people and customer success. There's like a player coach. And then someone reporting to her.
but actually they have.
They then have 3 solution engineers and a few people based in the Philippines.
and are kind of doing professional services type things. But like in onboarding, basically. And they're like they're thinking, you know, should we charge for this like, should we not?
you know I know another company like the company mentioned that, you know 9 people, and you know about 7 million in revenue. They had their engineers
trade off on fielding customer support tickets up until October, so they didn't have a customer support person. They like wanted the engineers to take ownership of that so that they could develop that empathy, and just like immediately scalably bake things into the product. But then in October they hired their first customer success person, who's also going to be building out the team. But I don't think she has anyone reporting to her now she's like the only one.
I I think those the 2 examples I mentioned are normal for companies. Well, the the first example is one where onboarding is an intensive thing.
And the second example is you know, I think more like self serve product.
they're actually selling to enterprise and mid market. But they're but they've been able to have, like, you know, the mostly sort of like product led approach. And I I think those 2 examples are probably like representative of what's needed at that stage.
Yeah, I mean, I don't have benchmarks either. My instinct was saying that, like anything more than 10%, you're probably getting in dangerous territory right where you could be facing a cost cutting, you know. Sort of
you know, sort of strategy later, which is just
never fun to do. Cost cutting for the benefit for the purpose of just cost cutting, you know. That's totally fine. And and to be just trying to drive productivity or trying to improve the customer experience and lower cost over time, but cost cutting just for the Ben, just just for the sole

purpose of cost cutting. I'm not a fan of. So that was sort of my instinct that it was that like. But I don't have any specific benchmarks. We didn't.
We we measured cost to serve at toast, but we didn't hold ourselves to a specific ratio of revenue. We just knew that we wanted to
get it at, you know. Find that. You know that equilibrium where we're we're lowering costs. But we're but actually doing it in a way, we're also improving the customer experience, not impacting it. And you know, one of the challenges. I think when when you know companies get into this like, Oh, we gotta cut costs mode, right is
a actually one of our one of my board members at at toast, you know, like, had a really funny example of, like, you know a company that was like, Oh, we what we want to reduce support tickets as a way to cut comes cut costs. And so we just took the support number off the website. Okay? Well.
that is like, yeah, sure, you'll cut costs like that, you know, like, that is not necessarily the smartest way to cut costs right? I would rather say what you know. Ha! What tools can we get for every support agent to make them more productive? Right? Or how can we deflect tickets through improvement in the product? You know, that's a better way to reduce support tickets. Then.
yeah, taking the number off the website. So no specific number for you other than I would, you know. Like again, just high level.
I would think over 10% might start to. But it depends on the business model, as Alison said, right? Some business models are, you know, enterprise software, which you need an army of people to, you know, just get the product live. And it takes 6 months. And you, you need engineers and professional services and some everything self service.
so your business model is, gonna you know.
partially. And then, if if your cost to serve is really high, then, you know, look as we talked about in the revenue class look for ways of maybe offsetting it, but by charging for some of it. you know, and or focusing on productivity and and automation.
Great. Thank you so much. Super helpful.
Thank you, Veronica.
I think we have time for one more quick question
now.
Okay. Well, Manual and Allison, this was incredibly insightful. Thank you so much.
I fully enjoyed this conversation, as as Emmanuel said at the at the top of the call. It would be great to hear from you all on on if you like this format. So please do give us feedback, but before we wrap Emmanuel, I will pass it back over to you.
Great. Well, I wanted to just wrap up Cco school, cause this is it, and just the last few minutes left.
It has been I think, a really great 8 weeks. I hope you guys have enjoyed it, too. I haven't been in your cohort sessions, but I've heard that those discussions have been really rich. As I think you guys all know, this is the first time that this group is doing. It's a reincarnation of Cco. School. It was not the first time civilians doing it, but it's a reincarnation of it. And
You know what I I you know I I took some of the great things that the last one did, and but also changed it up a lot. We're going to be doing it again in the fall, and so I am very much looking

for your deep feedback on what worked? What didn't work? You have had surveys all along. I'm going to be pouring through those.
but also just feel free to reach out to me directly. You know, if you have suggestions on oh, we never covered this topic, and I was really hoping we would, or you know more of this, less of that. In general, I'm just looking for feedback so that we can make it even better for the next the next crew and then some of you weren't here at the beginning Alison.
Alison, do you want to repeat what you said about the, you know, getting your certification and the the final final things you need to do.
Yes, thank you very much. That's a great point. And I to Echo Manual. I did share the feedback link for Cco. School as a whole as well as today's session. So we look forward to hearing from you. Just to reiterate our final exam will be available, which, within doshable by the end of today. So keep your eye out for that. I will also share a message in slack. When it is available. You will have 3 weeks to take the exam. It is 20 questions.
The deadline is May fifteenth, and you must earn at least 80% to earn your certificate, but not to worry. It's open book, open note and you are able to take it multiple times.
With that, if you have any, follow up questions, please feel free to reach out to me on slack or email, or you can email us at our excuse me at learn@joinpavilion.com but it's been a pleasure being with all of you. Thank you so much. This semester has been fantastic.
Great. And don't forget to fill out those surveys on the class today. And Cco as a whole, we're definitely gonna the whole. The group of professors and instructors gonna get back together over the summer to look at all that feedback and and try to improve it for next time. But thank you so much, everyone, for all your involvement. Everyone was super engaged this whole time that all the discussions were highly interactive, and I appreciate it.
Really fortunate to have the have the opportunity work with all you, and so stay in touch. Link in if you haven't yet and look forward to other pavilion sessions with you guys.
Absolutely congratulations everyone. Thank you. We'll see you again hopefully in a class soon. Take care.
Aye.
Awesome. Thank you, Emmanuel.
Thanks, so much.
Bye, everyone take care of you. Well.
You guys?
Great course.
Thank you. Bye, everyone.