

Post Sales Revenue Strategies for CS Leaders & CSMs

CSOH Breakout Notes

Dec 5, 2023

Lightning Round Introductions!

- Name
- Current/ Most Recent Role & Company
- Status: Job Seeker, First 6 months, 6+ months
- **Question prompt:**
How do you/ your team bridge between outcomes for your company vs outcomes for your customer? How can you proactively tie CS metrics to revenue? (Leading & Lagging)
- **Question prompt:**
Jobseekers: How do you tie your CS metrics to revenue & business growth/ outcomes? (Leading & Lagging)

Group 1

Names: Kat, Kristine, Kim, Erin, Esther, Debbie

Notes:

Prompt 1 - CSQs integrated into CSM comp plans, intersection of CSM action on every stage of customer lifecycle and which actions drive, pitfall of reactive 1:1 support action vs. proactive actions, role of content marketing/customer ed/communities (air cover) on proactive motions

Leading indicators -

Lagging indicators -

Group 2

Names: Devin Walker, Jason Marin, Julie Fox, Ashley Thorpe, Rajendra

Notes

How do you/ your team bridge between outcomes for your company vs outcomes for your customer? How can you proactively tie CS metrics to revenue? (Leading & Lagging)

Discovery process is important - we're at the high end of the spectrum of high touch - I work in AI which is a little tumultuous, right now creating a course as a way to qualify our customers throughout the process to know how complicated it can be

Different steps that we can take - at my last company, we owned revenue, at my current company, AM own revenue, the biggest thing is speaking your customer's language - understanding their industry, their goals, what's important to them, how they define value and speaking to that. We can make recommendations - we can use that information meeting over meeting "hey, last time we spoke, this was important for you - is it still important?"

Julie Fox - blog with templates

<https://gaininggrowretain.com/kb/articles/106-measuring-what-matters-a-guide-to-discussing-and-measuring-customer-goals>

Webinar on topic: https://www.youtube.com/watch?v=rOf9_LtC2jo

Group 3

Names: Lani Dame, Ty Raia, Linda Gordon, Janet, Ryan Supeene, MC

Notes: CQL, understanding where the customer is and wants to go, having them both grow together,

- Other metrics: brand loyalty, market insights; look at growth across install base and not just one segment
- Metrics: direct expansion opportunities, user adoption

Group 4

Names: Andrea Stojanov, Percy Rose, Kai Moon, Gillian Taylor, Laura, Jim Grande

Notes:

- **Question prompt:**

How do you/ your team bridge between outcomes for your company vs outcomes for your customer? How can you proactively tie CS metrics to revenue? (Leading & Lagging)

Percy - outcomes frameworks for customer - did a talk at TSIA: Mitigate Risk, Reduce Costs, Increase Revenue (pillars/categories) - interview customer and discuss/understand the elements of each pillar - then start doing benchmarking (eg. reduce operational expenses). A top down approach.

- **Question prompt:**

Jobseekers: How do you tie your CS metrics to revenue & business growth/ outcomes? (Leading & Lagging)

Group 5

Names: Eric Rajala (looking for CSM role), Neil Isaacs (looking for CSM role, remote or San Antonio area), Tarek (CS leader, experienced with high touch and tech touch | looking for what's next, possibly consulting), Elissa M (job seeker, experience as account manager in media services), Kyle Enman

Notes

- **Question prompt:**

How do you/ your team bridge between outcomes for your company vs outcomes for your customer? How can you proactively tie CS metrics to revenue? (Leading & Lagging)

- Loss prevention: Unhappy customers aren't going to pay more and are going to give negative references to peers, hurting brand.
 - Lagging: NRR - customer loss, discounting to "save" accounts.
- Consultative selling: not selling software you're understanding their problems and coming up with solutions.
 - Leading: count of demos, count of references, CSQLs
- Building culture that champions the company and products.
- Building culture that understands success of the customer is key to everything that comes after. Nobody gets raises if the customers don't renew.
- **Question prompt:**
 Jobseekers: How do you tie your CS metrics to revenue & business growth/ outcomes?
 (Leading & Lagging)
 -

Group 6

Names

Notes

Group 7

Names: Josh Greenstein, Fran Rubenstein, Lakshmi Savaram, Randy Rosen, Bayron Toruno, Martin Sagendorf

Notes: Josh-IBM- GTM leader covering product, sales, CS, team currently has one major client- went to market Apr last year. Heavy on implementation currently

Fran-Tying CS tasks to revenue is difficult. Passed CSQLs to Sales

Martin- Early stage edu-tech. Sales is credited for revenue though CS passes on the leads

Group 8

Names : Anika Zubair(CS Leader), Dan Grace (looking for next role), Garner Stewart (CSM), Shaun Porcar (CS Leader), Waiching Wong (CS Leader),

Notes

- **Question prompt:**
 How do you/ your team bridge between outcomes for your company vs outcomes for your customer? How can you proactively tie CS metrics to revenue? (Leading & Lagging)
 - Taking the time to map out customer journey and cross collaborate as you built it
 - Prioritize identification of customer outcomes - outside-in thinking. Rigor in sales/discovery to identify how stakeholders are evaluating our solution and will be measuring value
 -
- **Question prompt:**
 Jobseekers: How do you tie your CS metrics to revenue & business growth/ outcomes?
 (Leading & Lagging)
 -

Group 9

Names: Christina Alvarez, [Rachel Baker](#), Kathy Fava, Mohit Khera, Cinthia Silva

Notes

- **Question prompt:**

How do you/ your team bridge between outcomes for your company vs outcomes for your customer? How can you proactively tie CS metrics to revenue? (Leading & Lagging)

- **Question prompt:**

Jobseekers: How do you tie your CS metrics to revenue & business growth/ outcomes?
(Leading & Lagging)

- Expansion & renewals - CSMs got incentives for increase in revenue post-sales
- "New year's resolution" to build up our talking points on revenue and transferable skills
- For transitions, identifying contributions and creating 2 bullet points per role
- Optimize your LinkedIn headline to who you are, not what you do
- Include lists in the LinkedIn profile About section - tech skills, other skills

Group 10

Names [Allison Murray](#), Bill Kaechele, Emma Lo, Laura Litton, John Faig, Pam Micznik

Notes

- **Question prompt:**

How do you/ your team bridge between outcomes for your company vs outcomes for your customer? How can you proactively tie CS metrics to revenue? (Leading & Lagging)

Tracking Onboarding, Time to first Value, Articulating/finding value

Customer Journey Mapping

Data driven approach and identifying the metrics customers are measuring

HOW ARE YOU MEASURING _____ to meet value point

- **Question prompt:**

Jobseekers: How do you tie your CS metrics to revenue & business growth/ outcomes?
(Leading & Lagging)