

Post-Sales Metrics: Stories & Achievements

CSOH Breakout Notes

Nov 7, 2023

Lightning Round Introductions!

1. **Question prompt:**

What sorts of metrics are you measuring today? What goals are they leading towards?
(Job search, Individual Contributor/ CSM, CS Leader)

2. **Question prompt:**

If you're not using metrics to measure your goals and activities, what has kept you from it? How might you overcome those challenges? (Job search, Individual Contributor/ CSM, CS Leader)

Group 1

Names: Dorothy Skirzenski, Ty Rala, Harmol Singh, Maryann Lazzeri, Gary Hoffman

Notes: Ans 1: NPS, NRR, Expansion, Product Adoption, Success of Customer(Tailor Made).

More focus on relationship building and showing the ROI.

Ans 2: Incorrect/Bad data - Product Growth over time, Quality of Success Plan, Data is measured at business unit level which is hard to measure it.

Group 2

Names: Lisa Day, Nicole Hamilton, Ashley Thorpe, Divya Apte, Gladys Israel and Chris Pollom.

Notes:

Ans 1: TTFV, Customer health, Customer lifetime value. Rate of upsell, revenue generated from crosssales.

Build voice of customer and track advocacy gotten from your current customer base to know revenue influenced/gotten from your advocacy and also calculate the TTFV for the new clients gotten via advocacy.

Customers helped determine what metrics count in determining success on their end.

Group 3

Names: Gillian Taylor, Julian (Trey) Winters, Shaun Procar, Pricila Fletcher, Phillip Chatoff

Notes

What sorts of metrics are you measuring today? What goals are they leading towards? (Job search, Individual Contributor/ CSM, CS Leader)

- What definition of CS is determines how CS teams measure value
 - Shared, demonstrate value realization, market fit
 - Quantify desired outcomes
- First Time to Value and improving onboarding experience especially with complex products leads to higher retention
- Consumption based selling model = platform adoption, how many business units
- Understand how stakeholders were seeing value - measure those objectives and KPIs

- Work backwards from what customers are trying to do and what data they want to see for their business
- Demonstrate cost savings based on features customer was using
- Scorecard to measure performance of CS - advocacy, financial, tenure, key stakeholder engagement

If you're not using metrics to measure your goals and activities, what has kept you from it? How might you overcome those challenges? (Job search, Individual Contributor/ CSM, CS Leader)

- Not measuring individual performance of CSMs based on customer metrics because company was in too early stage of maturity (less than 20 customers)

Group 4

Names: Trevor Johnson, Kimberly Knowles, Timbra Vaughn, Jean-Pierre Frost, Rushi Sanathra

Notes:

- Use the metrics to support the story. It can be a luxury to have clean data. The data may not be accurate. Think about the deeper reason of what I'm trying to accomplish with the customer.
- Holy Grail is logo retention in higher education - upsells / crosssells aren't typically measured. Highered also looks at % of students who graduate in 4 years or 6 years, And the discount rate (i.e. how much financial aid do we have to give to students - so how much revenue do we actually get from each student). We also look at # of credits hours total.
- Pet peeve: Not having enough data
- Wish for the ability to hone in on what we really do and what had an impact. Ability to tie it to revenue.
- Difficulty of getting access to the monetary value of things.
- Struggle to condense everything down and make decisions with it
- Sometimes there is the opposite problem of having too much data
- Have to show you are spending your time as a CSM. How are you interacting?
- Are touchpoints fruitful? How is the fruitfulness measured?
- Enter your information into Gainsite (for example)
- Intangible results that are real, but difficult to measure. You may have to create your own measures of your own impact and growth.

Group 5

Names: Elizabeth Blass, Lovlyn Andawey, Jennifer Kleinhans, Clifford Carron, Garner Stewart

Notes:

- SMB NRR, crosssell/upsell, logo retention, TTFV, churn rate, usage trends/drops, adoption, want to measure # of contacts, NPS, customer sentiment.
- One member noted that there are no metrics being tracked for her area; might be good to suggest to leadership team (they seem to want to retain control of metrics (and not share)).
- Talked about how to calculate TTFV
- Talked about tools, dashboards to track - a lot of customer health but feels it isn't as accurate as it could be. Measuring adoption to eliminate/reduce surprises.
- Avoid watermelon customers (green on outside, red on the inside); CS is not the dept of happy customers.

Group 6

Names Eric Rajala, Paul Bernstein, Laurie Barlev, Kathy Fava, Fatima Somarriba

Notes: metrics used: gross revenue retention (new business formation), net revenue retention (scale CSM), customer "sentiment," engagement rates (frequency, support tickets, webinar attendance, number of end users, etc).

Group 7

Names:

Notes:

Group 8

Names: Debbie Silverman, Sarah Cundari, Eric Cheng, Jay Marin, Cinthia Silva

Notes:

Metrics:

- Small team, want to focus on leading and lagging metrics because we need something to start with! We also started importing product usage
- Focusing on product usage (data) can be rich (# of log-ins, how long is it being used) but also binary; other things to look at (*# of touchpoints, how often are you meeting, NPS)
- Going after at-risk customers (because of a new CS team), so we started with the customer health score (usage, Jira tickets, how many markets, how big the subscription, how in depth they were invested in us) and from there cadences for calls (and structures for calls), how do we handle meeting minutes) and at end of year, we put those together to pull out feedback and suggestion to pull out a Voice of a Customer, but that got the buy-in from our product team because they were excited to hear what customers were saying
- We also look at financial metrics (eg on-time, past due), as well as metrics like adoption and usage (we're putting it together fairly manually - we do track tickets, and development items) but that's kind of all mixed together (how at-risk they are and health score)

Question: what's the health score secret sauce?

- Complexity of product, type of customers. 50% of our health score was related to how people are using the platform (activity, calibration that shows that they're looking at how to fully leverage the tool, then some sort of engagement score) and then the other 50% was Jira tickets, length of time they were with us, NPS, customer satisfaction. Oh and this is all in excel!
- We review ours quarterly and different things are measured
- For us, success metrics are pretty similar for our customers (for us, it's BDR/SDR managers about booking meetings) which means that if a specific metric isn't being met, our customers are not successful with our product.

Group 9

Names: Drew Mintzell, Eric Reichow, Erica Scully, Bill Kaechele, Kristine Kukich

Notes

What sorts of metrics are you measuring today? What goals are they leading towards?
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Referencable clients by CSM, Advocacy (Drew)

Customer Health using leading indicators (Eric)

Feedback loops (Drew)

Make sure that the team is driving the right metrics toward retention (Erica)

If you're not using metrics to measure your goals and activities, what has kept you from it? How might you overcome those challenges? (Job search, Individual Contributor/ CSM, CS Leader)

Build them yourself - your own metrics, alignment

Group 10

Names: Kyle Enman, Erika Villarreal, Stella, Nikka Holder, Nika

Notes:

- What sorts of metrics are you measuring today? What goals are they leading towards? (Job search, Individual Contributor/ CSM, CS Leader)

- Stella: Revenue associated with services attachment - Bonus measured
 - Lagging indicator for services: hours to budgeted.
- Kyle: always an issue with data cleanliness, which leads to people having to do their own metrics.
 - Productive utilization, billable utilization, delivered revenue, expired revenue
 - CSQs and upsells/cross-sells based CS or Implementation leads
- Nika: extremely low churn rate - customers are extremely loyal. Building a 90-day plan. What other metrics can be measured?
 - Cross-Sells & upsells
 - Advocacy metrics - metric to showcase referenceable customers
 - NPS
 - Customer Health

- If you're not using metrics to measure your goals and activities, what has kept you from it?

How might you overcome those challenges? (Job search, Individual Contributor/ CSM, CS Leader)

- Poor data from poor input processes