

# Building a collaborative customer success program

How does your organization define customer success? How do you know when your customer success program is accomplishing the desired result?

In today's leading Software-as-a-Service (SaaS) and technology services companies, the answers to those questions have evolved. Their customer success teams are reorganizing to reach beyond quick-hit, short-term success, to prioritize positive customer outcomes. By focusing on consistent, continuous customer success improvements, organizations are achieving demonstrable, tangible, and long-term business value.

## **An enterprise-wide collaboration**

Perhaps the best evidence of this transition is the tightening of cross-enterprise relationships in pursuit of customer value. Building an effective, scalable customer success program in 2022 is, now more than ever, a team effort – it's not only between customer success and professional services departments, but also with other functions, such as technical support, sales, finance, account management, and executive sponsors.

With that kind of functional diversity involved in customer success programs, it becomes imperative to have a structured approach to define the specific roles of each of those teams, as well as each and every member of those aforementioned departments.

## Metrics are good, but insights are even better

It is impossible to manage that which you're unable to measure. As such, many organizations begin their customer success journey by developing a customer health scorecard, which contains analytics including Net Promoter Score (NPS), customer sentiment and satisfaction ratings, and telemetry, for example user sign-ins.

However, quantifying customer success only tells half of the story. Metrics are futile if they don't directly lead to insights – while in turn, insights are pointless if they're not followed up by actions to be taken. This step is where many customer success initiatives tend to fail, largely due to the fact that the process of marrying all three of these components together has traditionally been flawed at best – and haphazard at its worst.

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## The playbook and the platform

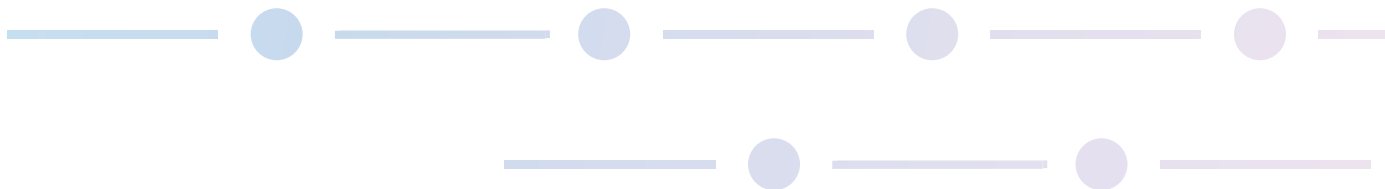
Translating customer success data and insights into a well-thought out, structured plan of action necessitates the creation of a formal playbook when it comes to driving customer outcomes, regardless of customer health. The playbook outlines a methodical flow-through, defining the tasks required to achieve customer success outcomes, in addition to the people and resources required to complete those tasks.

Once the playbook has been created, it must be operationalized. This requires finding the right support tool, a customer success software platform, which is capable of orchestrating all customer success operations across the organization. The most effective of these should be created and integrated with your Customer Relationship Management (CRM) system, while it should also display a complete picture of the entire customer lifecycle, providing a single source of truth for total control over all customer initiatives. What's more, the platform should enable professional services, customer success, and other teams across the business to collaborate and coordinate operations end-to-end.

An effective customer success platform should also go beyond mere scorecarding, and drive actions that deliver on customer satisfaction, retention, renewals, and referrals. To that end, it should align with a multitude of different types of playbooks – including executive and stakeholder change, go-lives, periodic business reviews, renewals, red accounts, and Customer Satisfaction Score Triggers (CSAT) – that require cross-functional engagement across the entire enterprise.

When it comes to creating a customer success playbook, a number of different components must be included in order to assist clients in achieving their scalable goals and aims. For example, milestones customers will achieve at different points of their journey should be incorporated into the playbook, while it's also vital to be very clear about the actions and next steps which need to be undertaken so as to allow as little room as possible for misinterpretation. It should also include tasks for customer success managers, as well as the intended goal, details of which team will be managing the project, and the time needed to complete the process. By creating a playbook which includes these features, customer success teams can establish repeatable, targeted, and scalable customer journeys at every stage of the process, helping clients to accomplish their goals.

Customer success playbooks which have been well-designed, supported by a sophisticated platform that formalizes and crystalizes an organization's entire customer success operation, is the key to collaborative customer success. With this powerful combination, businesses can create a scalable program that converts insights to action and empowers its teams with a plan to drive CSAT, retention, and expansion.





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