

SESSION #4

CS Leadership Bootcamp - Q2 2024

Customer Success at the Center: Cross-Functional Programs that Support Customer Success as an Outcome

May 28th, 10 AM PST / 1 PM EST

brought to you by **ClientSuccess**



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client**success**

**Every Function in the
Business Supports the
Success of the Customer**

Each Function Supports the Customer



Marketing

Markets product to customers, facilitates community and supports industry education.



Sales

Builds relationships and helps to identify champions; Supports customer advocates.



Product

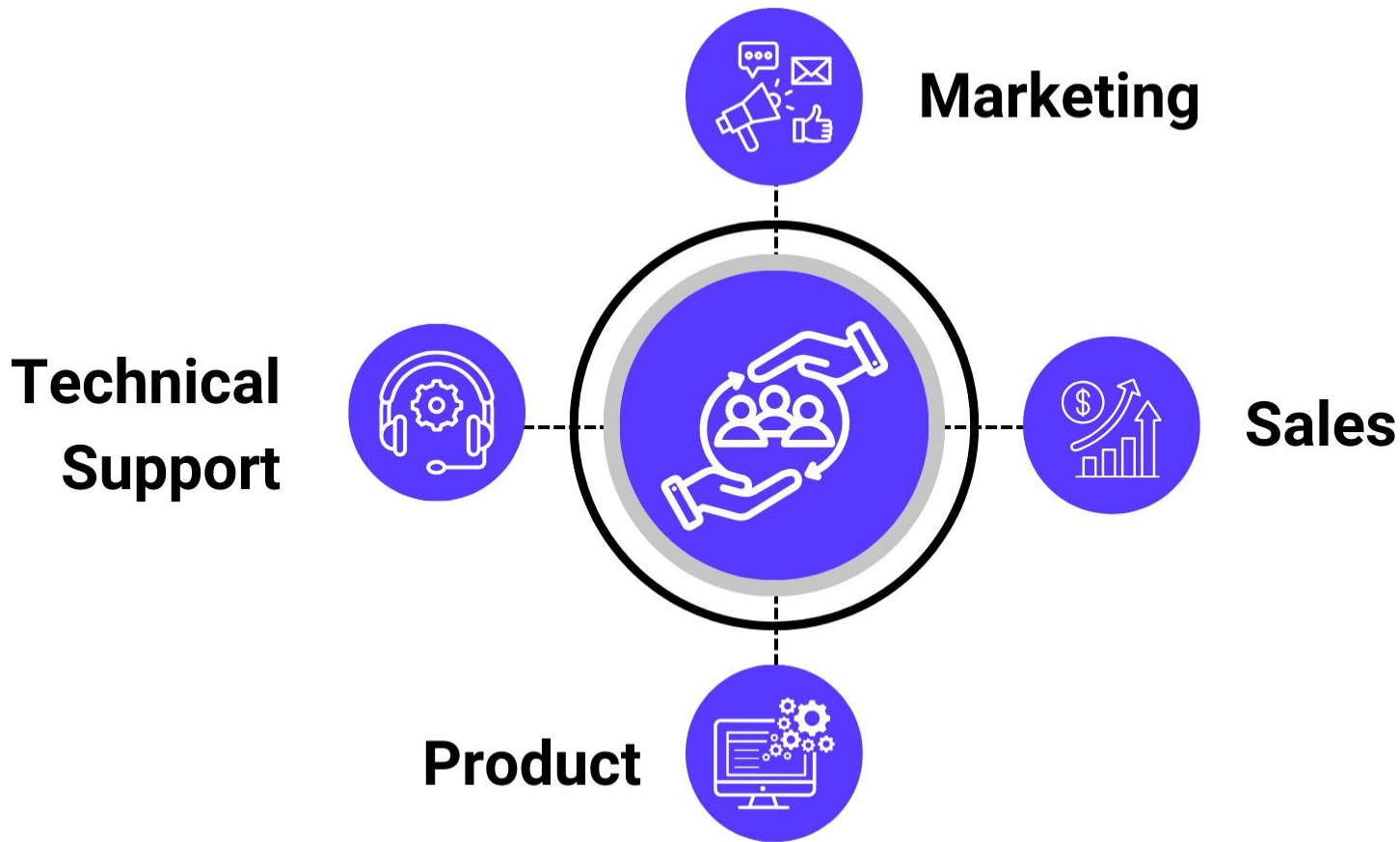
Designs product to best meet the need of the customer while building for the future.



Technical Support

Ensures customers understand how to best leverage the technology to drive outcomes.

**Customer Success
Facilitates the Successful
Execution of the
Appropriate Programs**



Design Initiatives that are Mutually Beneficial . . .

- 1.** Each program should serve the needs of the cross-functional team and the Customer
- 2.** These should not be a significant burden to the team you're working with
- 3.** Have clear and measurable KPIs that help each party quantify the impact

Start By Asking a Few Questions . . .

1.

Is this an initiative that aligns with current business goals?

2.

Will taking this on change customer results?

3.

Does the CS team have the skill and will to lead this initiative?

How CS can Partner with the Marketing Team:



Success Story Programs

Event Speakers

Brand Ambassador Initiatives



How CS can Partner with the Sales Team:

Referral Programs

Reference Programs

CS Qualified Lead



How CS can Partner with Product and Engineering:

Beta Programs

Product Advisory Board

Product Request Management

How CS Can Partner with Technical Support:

Office Hours

Training Webinars

Content Production



Before You Proceed . . .

Determine what the current business needs and objectives are and then choose programs

Be able to articulate the value for the cross-functional team and then pitch how it benefits the customer and CS team

Have a way to track the impact of each and every initiative. Determine the appropriate KPIs and map those back to the business for each team and your customers



TAKE NOTE

1. Start with one program at a time
2. Start small and test the impact of each initiative
3. Make sure it's clear who this benefits and how - this will help get cross-functional buy-in
4. Design the program and make sure to get feedback from the other teams before rolling it out
5. Measure EVERYTHING! You'll want to understand the impact this is having on the lead funnel, sales, product adoption, ticket volume and experience.

THANK YOU
Q&A