

## Session #1

Customer Success Leadership  
Bootcamp Webinar Series - Q1 2024

# Moving from Full Stack CSM, and Introducing Specialty Roles

Tuesday, February 6, 2024  
1pm EST/10am PST



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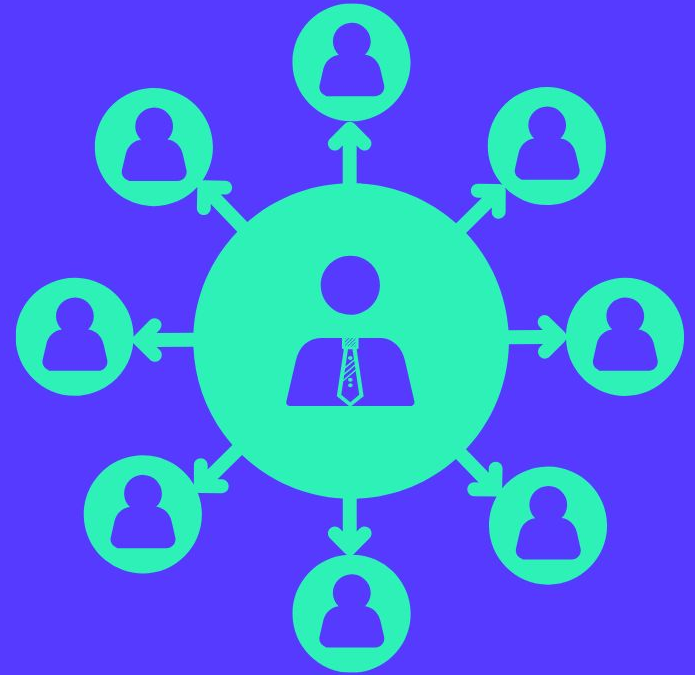
Chief Customer Officer

client**success**

# 262,735

PROFESSIONALS LAID OFF FROM  
1190 TECH COMPANIES IN 2023\*

**WITH LESS CSMS,  
IT'S IMPOSSIBLE  
TO DO MORE**



# FULL STACK CSM

**01.** **Generalists:** A full stack CSM is a generalist who typically manages the entire customer lifecycle, from onboarding to ongoing engagement and renewal.

**02.** **End-to-End Ownership:** They take ownership of the entire customer relationship and are responsible for ensuring customer satisfaction at every stage.

**03.** **Broad Skill Set:** Full stack CSMs need a broad skill set encompassing onboarding expertise, relationship-building, problem-solving, and renewal management.

# SPECIALTY ROLES

**01.** **Focused Areas:** Specialty roles involve individuals who specialize in specific stages of the customer journey, such as onboarding specialists, customer managers, renewal etc.

**02.** **Deep Expertise:** Each role has a deeper focus on a particular aspect of the customer relationship, allowing team members to develop expertise in their specialized area.

**03.** **Narrower Scope:** Responsibilities are more narrowly defined, concentrating on specific customer success functions rather than the entire lifecycle.

# BENEFITS OF A SPECIALTY MODEL

## Scalability

As the number of customers grow their needs may increase significantly. Specialized roles allow for better scalability, ensuring that each function is adequately resourced and can handle the growing demands efficiently.

## Efficiency

A specialty model can increase efficiency as each person can focus on a specific aspect of the journey. This allows for streamlined processes and the use of tools and technologies tailored to each function.

## Expertise

Enables the team to develop expertise in specific journey stages. Onboarding can focus on a seamless experience, CSMs can build strong relationships, and renewal specialists can develop strategies to maximize renewals.

## Increased Focus

By having specialists, there is a greater opportunity for increased customer focus. Each person can dedicate more time and attention to understanding and addressing the unique needs of customers at their particular stage.

## Data Driven Decision

This approach allows for data collection and analysis at each stage of the customer journey. This data-driven approach enables more informed decision-making and the implementation of tailored strategies to improve outcome.

In complex customer success lifecycles, different stages may require unique skills and approaches. Specialized roles allow for a more nuanced and tailored approach to each stage, addressing the specific challenges.

## Lifecycle Complexity

Clear delineation of responsibilities can lead to better role clarity for team members, reducing ambiguity and potential overlap in responsibilities. This can enhance collaboration and accountability within the CS team.

## Role Clarity

Different customer segments may have varying needs and expectations. Specialized roles enable the customization of customer success strategies based on the specific characteristics and requirements of different segments.

## Customer Segmentation

The customer success landscape may evolve, and industry trends may shift. A specialty model allows for a more agile response to changes in customer expectations, market dynamics, and technology advancements.

## Adaptation to Industry Changes

This enables better allocation of resources based on the strategic importance of each stage in the customer lifecycle. Resources can be directed to areas that require more attention or that have a greater impact on overall success.

## Resource Allocation



**IT DEPENDS**

# MAKING THE SHIFT

## 7 STEPS



Customer  
Journey  
Mapping



Customer  
Segments



Resource  
Allocation



Technology  
& Tools



Skills  
Assessment



Collab &  
Comms



Pilot  
Program

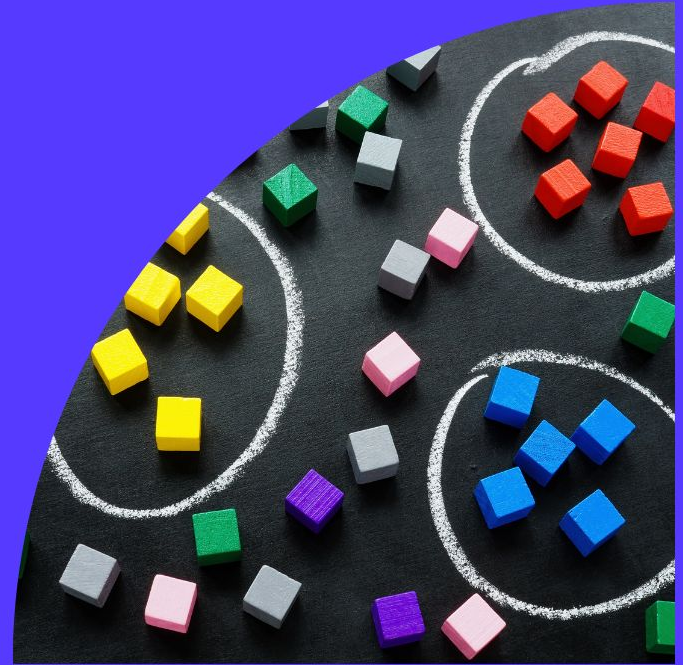
# Customer Journey Mapping

- **Understand the Customer Lifecycle:** Map out the entire customer journey, from onboarding to ongoing engagement, and eventually to renewal or expansion.
- **Identify Key Touchpoints:** Identify critical touchpoints where customers may need specialized attention or support



# Customer Segmentation

- **Analyze Customer Segments:** Evaluate your customer base to identify different segments with varying needs and characteristics.
- **Segment-Specific Roles:** Consider introducing roles that cater specifically to the unique requirements of each customer segment.



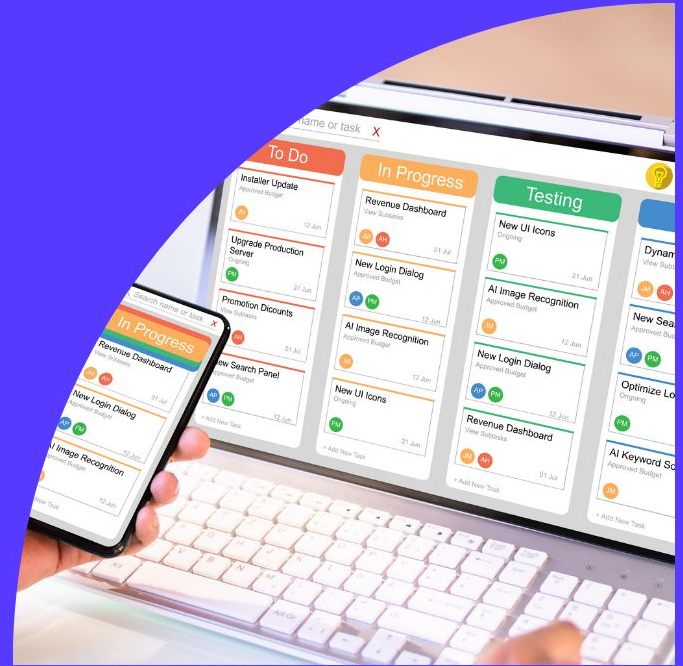
# Resource Allocation

- **Assess Resource Needs:** Evaluate the resources required at each stage of the customer journey.
- **Allocate Resources Strategically:** Allocate resources based on the strategic importance and complexity of each phase. Consider introducing specialty roles where additional expertise is required.



# Technology and Tools

- **Evaluate Existing Tools:** Assess the effectiveness of your existing customer success tools and technologies.
- **Identify Gaps:** Identify any gaps in tools that may hinder the efficiency of current processes.



# Skill Set Analysis

- **Identify Required Skills:** Define the specific skills needed for success at each stage of the customer journey.
- **Match Skills to Roles:** Align identified skills with the creation of specialty roles, ensuring that team members possess the necessary expertise.



# Collaboration and Communication

- **Assess Interdepartmental Collaboration:** Evaluate how different departments, such as sales, marketing, and customer support, collaborate with customer success.
- **Integrate Roles Seamlessly:** Ensure that specialty roles integrate seamlessly with other teams to provide a cohesive customer experience.



# Pilot Programs

- **Start Small:** Consider implementing pilot programs for specific specialty roles before a full-scale rollout.
- **Gather Feedback:** Collect feedback from both customers and team members during pilot programs to make necessary adjustments.





# TAKE NOTE

1. Now might not be the right time
2. Do your research and determine the best roles
3. Enable the new roles properly
4. Get crossfunctional buy-in
5. Keep iterating

**THANK YOU**  
**Q&A**