

SESSION #3

CS Leadership Bootcamp - Q2 2024

Introducing Customer Success in the Sales Process: Setting Expectations and Building Seamless Experiences

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The Average Sales Close Rate in the Software Industry is 22%*

*The Complete Breakdown Of Sales Close Rate, Fable, April 2024

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**Bringing Customer
Success into the Sales
Process Would Increase
Your Close Rate by 2-5%**

**Tie Customer Success
to Revenue on Day 1.**

Imagine Receiving Customers With ...

Proper Expectations

Customers who understand what happens after the sales process.

Defined Goals

Customers have clearly defined goals with KPIs that align with the partnership.

ICP Alignment

Customers who can be successful with the product and the partnership over time.

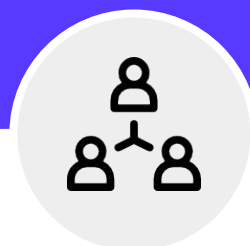
Sales Teams are Concerned ...



Bringing in
Customer
Success
will slow
down the
sales process



CSMs have
a tendency
to overshare
and create
risk in
the deal



There are not
enough CSMs
and they are
all too busy to
join calls



When the
CSM is on
the call,
conversations
get very
technical

This Can Only Be True If . . .

- 1.** There is no clear and shared objective for engaging CS in the Sales process
- 2.** Neither Team has been properly enabled on the why, who and how
- 3.** Sales is mis setting expectations and intentionally omitting information from prospects

Start With Your Why

1.

Increase deal
velocity

2.

Set Clear
Expectations

3.

Build Trust
and Credibility



Who will be part of this collaboration?

All CSMs

Allows customers to meet their CSM in advance and establish a relationship and build trust

Strategic/Sr. CSMs

Target strategic accounts or top segment to help consult

Customer Success Leadership

Strategically leverage leadership in specific risk situations



What role do we envision them playing in the discussion?

Set Expectations

CSMs walk the prospect through the Customer Journey explaining how they will be supported

Product Expert

Answer specific questions the prospect has regarding implementation and best practices

Subject Matter Expert

Aligns with the customer on industry related questions or concerns and how to navigate them



How do you want them engaged with your prospect?

Joint Call with AE

Will this be a collaborative discussion with the AE and CSM with clear R&R

1:1 Call with Customer

Private session with the CSM to have a candid discussion with the customer - Great for relationship building

In Person vs. Virtual

If this is a field sale, do you envision the CSM joining you onsite? Do you prefer virtual?



When is it appropriate to bring the CSM into the discussion?

Early in the Process

Build this into the sales process as a formal stage to help prospects understand how we engage

After Verbal Commit

To keep momentum, introduce the CSM to the prospect to set expectations and get started

When Risk is Present

Mitigate risk by having a CSM address prospects concerns, anchor on successes stories and establish trust and credibility

Before You Proceed . . .

Build any assets you'll need
Ex. Slides, docs, playbooks

Create a tracking mechanism to keep track of which prospects had a CSM engaged in the Sales process

Establish a benchmark to track the effectiveness of this new initiative. You want to understand the impact on the close rate and the time to close.



TAKE NOTE

1. Start with a dialogue with Sales and CS Leadership to align on the objective and to make sure it's a fit
2. Start small and test with one AE and one CSM and measure the impact
3. Design what this process will look like at your company - there is no one right way to do this
4. Train and enable everyone involved to ensure we are not mismanaging sales deals
5. Measure EVERYTHING! You'll want to understand the impact this is having on deals ex) Close rate, time to close, ongoing success and retention

THANK YOU
Q&A