



2015

CUSTOMER SUCCESS PREDICTIONS

Insights from industry veterans and thought-leaders



Dear Reader,

Perhaps more than any other function, customer success teams have gone through abundant growth and change over the past few years. Because of this intense focus on the customer and new ways of capturing SaaS metrics, ClientSuccess surveyed a collection of top thought leaders across the industry who are leading the teams that are at the forefront of these changes. Each of these leaders have unique ideas of how 2014 shaped customer success, and what changes they are already seeing (and driving) for 2015 and beyond. In this piece, we share their powerful voices. These leaders represent some of the hottest and fastest growing SaaS companies, who are all defining what “customer success” truly means in their respective organizations and in the broader industry as a whole.

We believe that over the next year, many more thought leaders will emerge and join these leaders in defining the future of customer success... It's our hope that this ebook will foster ideas, innovation and evolution that will help transform how companies truly put customers success at the center of their business.

The conversation begins here, but we encourage you to join the conversation on Twitter using #success15.

Here's to great success in 2015 and beyond!

Best,

Dave Blake
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Mitch Macfarlane
VP Customer Success



Doug Grounds
Chief Customer Officer



David Verhaag
VP of Customer Success



Katie Rogers
Director of Client Success



Ray Rauch
VP of Customer Success



Bibhash Das
VP of Client Services



Dustin Kenyon
Senior Director of Client Sales



Chris Duskin
VP of Marketing



Derek Cordon
Sr. Director of Client Services



Greg Meyer
Customer Success Champion



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Mitch Macfarlane

VP Customer Success



In Mitch's role as VP of Customer Success at Instructure, his responsibilities include everything pertaining to post-sale, such as: support, training, implementation, account management, consulting, end user documentation, and the community team. Because of his broad customer lifecycle responsibilities, his teams are managed to a variety of metrics for each stage, to ensure appropriate attention and effectiveness across the entire customer experience.

Mitch believes that in 2014, customer success became a very "buzzy" topic without a correlate deep understanding. Even though the term "customer success" hasn't been around long, it has already gained commonality and has created much conversation across the industry as well as with VCs. At Instructure, Mitch and his team are fortunate that their customers see significant value in their offering and, as a result, Instructure has a very healthy 99% retention rate. That combined with the recent market attention, led Mitch to be asked by several investors to share their retention secrets so the methodology could be applied across other Fast forwarding to 2015, Mitch believes the changes we will see in the customer success space

will revolve around data. Without better insights and more access to client information, Mitch commented that, "we're in a vacuum of thought leadership—nothing really, truly exists and that needs to change. There needs

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to be more content in the market as well as a model (or models) for customer success leaders to point to. This change happened in sales with the introduction of the Challenger Sale, which radically changed how solution

selling was orchestrated. But now similar change needs to happen across customer success and account management,” said Mitch. He believes that in 2015 we will have a lot of “noise” from a variety of contributors around the topic of customer success, but specific concepts and best practices will begin bubbling to the top.

For a successful shift to a more customer-centric approach, Mitch elaborated on customer success professionals needing more access to customer engagement data and better tools to provide improved insights from that data. “Account management doesn’t mean taking clients out to a fancy dinner or out golfing for a day – it means making clients truly successful by helping customers achieve their goals through close partnership and providing them with data-driven input on how to improve their adoption and engagement.”

Mitch believes that the landscape for software will become more competitive and we’ll start to see vendors really engage in true partnerships with customers—that customers will demand higher service levels and tighter engagement or will find another vendor that will provide expertise and consultancy they need. And he believes that we’ll see

more satisfied clients as a result. According to Mitch, “a great customer success function can actually make up for flaws in the product. A true partnership and consultative engagement will help customers understand your team is invested in their success, and are not just asking for their renewal.”

The key areas that need to be addressed for the customer success function in 2015, according to Mitch, include truly understanding the customer and knowing why they bought your product in the first place, and then empowering customer success professionals to influence change across the entire organization. For example, Mitch’s team changed the customer invoicing process and lowered the company AR by 20% year over year while improving the customer experience. His team has even engaged the recruiting function to provide a better experience for job applicants. Mitch concluded by commending that, “addressing these key areas first and foremost will be crucial for laying a successful groundwork and putting the customer first in 2015 and beyond.”





Doug Grounds
Chief Customer Officer



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In Doug's role as Chief Customer Officer for Kapost, he is responsible for implementation, training, customer success and support with the goal of driving overall satisfaction, renewals, and upsells. Across those departments, Doug and his team measure things such as active users, expansion revenue, and renewal rates.

In 2014, his team experienced rapid growth due to a renewed focus on customer success. Because of this expanded focus and new team, they gave themselves freedom to “fail fast” to determine what this new market segment really requires in order to be successful. They also quickly built out initial processes and monitored KPIs closely since their team and the market is evolving so fast. Doug believes that trends in the space, outside of Kapost itself, are evolving quickly in terms of customer centric software solutions that are becoming more available and mature. In addition, the market is seeing an overall increase in “customer success” functions over the past 4-5 years versus the older “client services” model. Doug commented that, “[in 2014] we saw a more informed view of the customer lifecycle and began to understand metrics such as how many users were adopting the solution and/or platform, how often they used it, and how successful they were in achieving their goals or addressing their business pain. This, in turn, should drive higher retention rates for those organizations that aggressively and proactively seek to retain customers and their satisfaction.”

Looking forward to 2015 and beyond, Doug believes his team must leverage available software solutions and data with existing processes and make use of it to drive true action. Data and software are only the first step in achieving customer success, according to Doug. They must then be used by trained professionals who aggressively and proactively engage their customers. Kapost will do this by identifying key business re-

quirements that their solution addresses and engage with their product users as well as executives to validate the resulting return on investment.

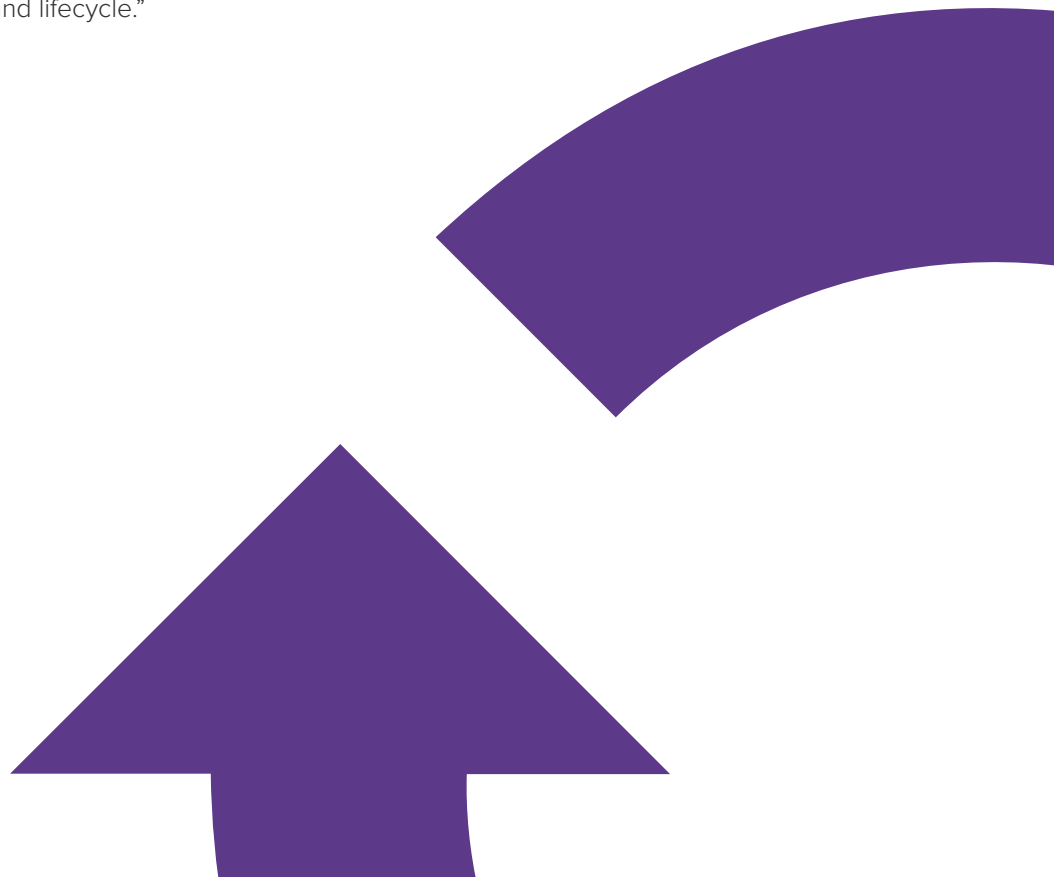
For the customer success professional, Doug believes these changes will better equip them for customer conversations, quarterly business reviews, and executive milestone conversations. And for the customers on the other end, more success will result, which in turn will help them achieve higher satisfaction and better alignment.

Doug also states that every customer success professional needs those traits of a pro-active partner to their customer – the data that informs how the product is being used, a good dose of paranoia about making sure the customer is achieving success, a good training program for the end users, and a great community and support organization.

According to Doug, it will be imperative that companies are able to gain the ability to view KPIs at a top level across each assigned customer, including day-to-day and week-to-week trends, as well as have the ability to drill into individual customer data to ask a range of questions, such as:

- How many of the seats/users are active within the solution?
- How much of the solution is being leveraged?
- Are the business goals being achieved and/or the business pain being relieved?
- How many teams or departments are actively using the solution?
- When was the last time certain key actions were taken within the solution?
- How many different types of solutions or use cases are being solved/addressed by the solution?

Lastly, Doug commented that, “having the ability to easily integrate software solutions together, such as CRM systems and other customer or product related platforms, will facilitate a unified view of the customer landscape and lifecycle.”



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“Only after customer success professionals truly understand the data behind customers as well as their experience and results with the software will we be able to build the meaningful relationships that the market now requires to continue to earn their business.”



David Verhaag

VP of Customer Success



As VP of Customer Success at HireVue, David is responsible for building out and growing the customer success function, which has evolved significantly in the last 2 years. They measure their success by tracking product adoption, net promoter score (NPS), customer retention, as well as revenue retention. Over the last 2 years, they've seen vast changes in the customer success function – both in their business and the market in general.

In 2014, David believes SaaS companies “got religion” around customer success. He commented that, “software companies understand the need for this function – they know they need to build deep relationships with customers based on successful product results and business outcomes in order to secure renewals and revenue, but they aren't always sure how.” He believes that many companies started experimenting with customer success to figure out what their clients

truly needed, but few had clearly defined processes to support the function. He went on to say that, “In organizations where there weren’t clear definitions or processes for customer success, it has been a bumpy ride. The role has often shifted from Sales to Services to Operations and back again. Companies were struggling with who owns the accounts, who should renew the account, who is ultimately responsible for the customer’s success and which executive should own the function.” In one company that David knows of, the VP of Customer Success was incredibly frustrated by the inability to get traction due to the continuous movement of the team. Within 3 quarters, renewals ownership moved several times between 2 different teams and the priorities kept shifting from customer success (or health) to upsell/expansion and back again, which made focus a major challenge.

David believes that, “While the road to developing customer success as a function has been bumpy, it is still a net benefit to the customer.” His perception is that the customers, no matter how imperfect the function may be, still view their relationship with customer success team members as better than the legacy model where nothing happened until renewal.

David went on to say that if businesses got religion in 2014, then 2015 will be about

evolving the practices and processes to support the changing customer success function. In 2015, customer success teams will also have to prove the ROI for the function and will be held accountable to a set of metrics – just like every other department. Customer success will be evaluated against real numbers such as revenue increases, churn reduction, product adoption and overall customer experience (NPS).

David also believes that customers are starting to understand the customer success function to a greater degree. “As it continues to grow and become more disciplined, customers will begin to expect it. They will have seen deliverables such as quarterly business reviews, scoring and benchmarking, and other huge value-adds and will know what ‘great’ looks like.” Looking ahead, David commented that, “Customers will continue to learn about the function and also see the customer success teams gain confidence in pushing the customer to identify real business challenges they are trying to solve so that we can connect the value delivered and answer the ‘so what?’ questions.”

In 2015, David believes it will be crucial to run customer success teams on data. And in order to do this effectively, they will need an array of tools and solutions to use in order to allow them to impact change across the entire organization. One such role that he believes will become necessary is an analyst for the customer success team. This person should be dedicated to crunching numbers and looking at data to identify gaps in customer accounts, measure churn and retention, as well as establish and leverage a customer health index. David concluded by commenting, “Only after customer success professionals truly understand the data behind customers as well as their experience and results with the software will we be able to build the meaningful relationships that the market now requires to continue to earn their business.”





Katie Rogers

Director of Client Success



As Director of Client Success at SalesLoft, Katie Rogers currently has a team of eight CSMs who support and manage two products. Katie's role has significantly evolved over the past year. This involved moving from a CSM herself (the first one at SalesLoft!) to being promoted to Director, hiring her team and building the program from the ground up. When Katie was first hired, the company had 72 accounts, and now they have over 850! Needless to say, her role is evolving and growing each and every day.

Katie measures her team through various KPIs, with upgrade monthly recurring revenue being the ultimate goal. Katie commented, "With a surge of new clients coming in, we have such a great opportunity for growth potential. Our number one metric right now is driving revenue via upgrades, and number two is churn reduction." She does this by giving her team ownership to make decisions and motivating them to help reach the negative churn goal, which she notes they are "so close" to achieving.

The function of Client Success wasn't present at SalesLoft prior to 2014. First and foremost, Katie's role became one where she needed to evaluate what was happening across the customer experience. She commented that when her role was announced, clients instantly gravitated towards the culture of Client Success. She explained, "We kept it scrappy for a while, and once we had the resources we then expanded quickly."

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"By being supportive and positive while showing them our amazing products, the clients feel the energy."

Katie attributes the vast improvement in communication of client needs/wants to the implementation of the CSM team. She explained that customer feedback is directly fed into the product development team, where customers love to see their ideas turned into new features.

Katie went on to say that in 2014, the introduction of Client Success made SalesLoft realize they needed more of it. They had so much feedback pouring in that they quickly realized how incredibly valuable it was to the business and to innovation. However, in the beginning of 2014, Katie was a one-person show and they needed to be able to scale. Fortunately for Katie (and the team she would eventually form), SalesLoft believed in Client Success and invested in the function to truly support the efforts they needed to tackle.

Katie explained that their client relationships soared after adding more Client Success team members. “There was more outreach, more referrals, more people talking on Twitter. I think our clients truly understood we were here to help.”

Looking ahead to 2015, Katie believes we’ll see even more Client Success teams being built, especially by high-growth startups. “When the CSM role is first introduced, if implemented correctly, it won’t just be seen in larger companies. Every company will make moves on this, and they’ll wonder why they didn’t do it sooner.”

Commenting on her own personal experience working in Atlanta Tech Village, Katie explained she was one of the first CSMs there. She said it has been rewarding for her to be able to see more Client Success professionals come onto the scene, and she has been able to assist with questions about implementing and strategizing for growing CSM teams.

“Once you get the foundation in place, you can specialize,” Katie explained. “In our case, the theme of Q1 is upgrading.”

Katie went on to say that in 2015, when customers are given “Happy Lofting vibes,”

it’s returned tenfold. “Our CSM team is growing and, in turn, so are our customers. By being supportive and positive while showing them our amazing products, the clients feel the energy. They get so excited, especially when they see the results. Growth – that’s what it comes down to. It’s really a win-win all around.”

Overall, Katie believes Client Success is on the rise and the momentum is building. “A few years ago, it wasn’t a priority. Companies are forced to deal with realities like churn, and have to take care of situations that don’t involve winning deals all the time. It’s all about the little details, and now Client Success teams can have a real impact on the big picture.”





Ray Rauch

VP of Customer Success



As VP of Customer Success, Ray joined Tealium about 10 months ago with a focus on making sure customers are maximizing the use of their technology. Ray believes the logic follows that delivering high and targeted value drives continued renewal and customer growth and contributes to a predictable growth and renewal cycle. In his role, Ray is responsible for the entire customer lifecycle including education, account management, implementation, post implementation support and solutions engineering.

According to Ray, Tealium's core value is in the management of the data layer. He commented that many of the members of his team have a background in web an-

alytics and are data bred, so they tend to think about the world in terms that only those things which can be measured matter and as such, have numerous KPIs across the business. Ray's team measures core metrics like customer retention by count, revenue retention, upsells, and cross-sells. As a softer KPI, they also measure how educated their customers are by tracking penetration of marketing campaigns, products per customer and customer participation, such as attendance to their weekly webinar series or Tealium University.

In 2014, Ray believes the customer success space really started coming into its own from a professional and technolog-

“The end goal needs to be a true 360 degree view of the customer”

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ical standpoint. He commented that, “The movement to lead with customer success seemed to gain sudden traction – I was being approached about success technologies on a near weekly basis and I certainly wasn’t seeing that in the past. Those of us focused on customer success have always talked about the challenge of maintaining a real-time 360-degree view of the customer, so it’s refreshing to see some real technology starting to wrap around that concept. It always felt like we were compromising before and couldn’t always quantitatively identify customer risk or opportunities. The notion of automation of risk and opportunity potential was a boom to customer success in 2014, yet solutions providers all still seem pretty early in their development of the technology.” Ray commented that even at Tealium they experienced their fair share of growing pains, but he believes in the long run the benefit of more automation will allow customer success professionals to actively participate in more high value behavior and consultative engagement with their customers.

Ray believes the market is seeing a shift away from an email-centric way of managing books of business and tracking risk of customer accounts through the use of ubiquitous but ultimately crude and manually driven red, yellow, and green reports. Top of mind for Ray is that there’s some resistance to setting the more antiquated practices aside because the best account managers in the past had become good with email-like tools and manual checklists and now need to adjust the way they do their jobs. Ray commented that, “The market needs to prove there’s a new and better way of managing customer success for those professionals.”

Ray’s desire is that a higher touch and lower cost of service delivery will mean professionals can do less data entry and provide a higher level of service. When repetitive low impact behavior goes away, it gives them the ability to focus more on delivering high value touchpoints that really benefit the customer.

If the space continues down the same path, Ray believes that in 2015 we’ll see rapid maturation in the space and expects a few will rise to the top as thought leaders. Ray commented that, “2015 will be an interesting year for Tealium because we’re not just figuring out the role, we’re also working through operational changes. We’ve evolved into a critical component of our customers’ business, and with this change there has been increased focus on our ability to scale and our ability to perform at a consistently high level, which is a blessing and a curse. We’ve become such an integral part of the business that we’re in trouble if we stumble.”

According to Ray, the effect on customers will be dramatic because we, as an industry, will be able to respond to customer needs close to ground zero. Much like how interactive ads are now extremely targeted and have become expected in the consumer world, the expectation for customer success will be similar. Ray believes we’re at the turning point now – we’ll be able to make data driven predictions based on learnings and what we can determine from the data across the entire customer set. He gave the example that, if a customer who typically uses features A and B in a certain fashion also benefits from feature C, we can now recommend that to other customers that fit a similar use profile.

Going forward, Ray believes we’ll need tools to help define patterns in current behavior and future behavior. New solutions for customer success professionals will be required to have best of breed integrations into current systems, including data points such as product usage, CRM information, case submissions and external survey data. It will be necessary to bring in all of those data points to determine whether customers are leaning out or in. Ray concluded by stating the end goal needs to be a true 360 degree view of customer – which means it’s really all about a unified platform for the customer success professional.



Bibhash Das

VP of Client Services

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BRANDcom

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Bibhash is VP of Client Services for Branding Brand, and is responsible for the entirety of the existing client base and their experience with the company. He and his team manage account management and customer support, and are immensely focused on client delight, client retention, and client growth.

Bibhash commented that, broadly speaking, he has seen more chatter and talk around customer success recently. He commented that, “Companies are trying to figure out the maturation model of customer success. I think companies, when starting out, see the concept of account management as a jack-of-all-trades and not necessarily as defined individual functions.” He went on to say that, “Many questions are being asked around the industry such as, when is a company big enough for customer success? When does an account manager become a customer success manager, and is there a difference? When do you start to narrow the focus and start to identify their KPIs?”

According to Bibhash, empowerment of account managers and customer success professionals needs to increase. We frequently see that account managers are traditionally held to retention but there are many

factors that are tied into this, such as product and services, and they may not be empowered to help make the needed changes. In 2014, Bibhash believes that account managers became more of a hub or an integral part of “account pods” in which the account man-

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agers were tied to a certain set of internal resources that allowed the account manager to help drive resources instead of just raising their hands and saying “this client hates us”.

Moving forward in 2015, Bibhash predict-

ed, “The customer intelligence space will merge with the customer success space allowing the integration of intelligent data and pattern data that will feed into customer success mechanism, of which the customer success professional will be the hub. We really need a play-book – these customers are all seeing similar trends and we need to take specific actions based on data, including positive and negative. We need to strive for a closed-loop customer experience.”

Bibhash went on to say that another aspect of customer success in 2015 is on the other end of the spectrum, which is regarding the topic of compensation and how it relates to responsibilities. This ties back to the ability of the customer success professionals to solve problems across the organization and to truly know when they’re accountable and when are they not. Many have compensation tied to retention and according to Bibhash, “In every job I’ve been at, there are always exceptions to the rule. So providing these professionals with tools as an ‘early warning system’ means they would be empowered! They would have the tools now to be successful and to work towards their goals. This means they wouldn’t find out 2 days before renewal that the client isn’t happy – they find out 4 months prior the customer isn’t responding or attending important events. There is synergy in empowering these professionals and giving them tools for success, which also relates to their compensation. By providing the tools to prescriptively be aware of churn risk, an organization can hold customer success managers more accountable towards high retention goals at all ends of client segments.”

As a result of this, Bibhash believes it will be the year of the customer – even more so than before because the companies these customers are engaging with will actually provide them with real support and guidance. These customers have several vendors – and consequently, they don’t have the time to reach out to all of them and ask what they should be doing. Bibhash believes that in 2015 and beyond, the customer will start to experience strategic leadership from their software providers.

Finally, Bibhash stated that more tools and processes are needed for customer success professionals, specifically those tied to workflow, as well as tools to help them understand their customers’ lifecycles.



“Success professionals are still nervous to their validity in the organization. In companies where revenue quota is held within these positions, this fear and uncertainty is greatly diminished.”

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Dustin Kenyon

Senior Director of Client Sales



As Senior Director of Client Sales, Dustin leads customer facing sales teams who are responsible for the success of the renewal and attainment of growth revenue targets for customers. He and his team measure their KPIs based on quarterly and annual raw renewal rates, net renewal rates, and growth dollars and drive the results by developing an exceptional customer experience.

Dustin stated that in 2014 organizations were unclear what the real Customer Success role looked like. They asked questions such as, “is this person an advocate, a sales rep, a consultant, or something entirely different?” Dustin believes that more and more organizations with customer success functions are purchasing success management technologies; but to date, the adoption of the tools has been minimal and is not impacting KPIs.

Dustin went on to say that, “success professionals are still nervous to their validity in the organization. In companies where revenue quota is held within these positions, this fear and uncertainty is greatly diminished.” But for the customer, Dustin believes there is a positive impact when customer success is predicated on the entire customer experience from pre-sale through renewal.

Looking ahead to 2015, Dustin commented that, “as SaaS companies consider the improvement of the raw renewal rate as their ‘primary focus’, we will see more and more strategic dollars allocated

to the cause. I believe we will see more technologies introduced to support this need and in 2015, we’ll see changes in all facets to support this focus, including: more industry events, software offerings, Executive Success roles, success rep positions and analysis of the impact to SaaS customers.

The tools customer success professionals need, according to Dustin, will provide visibility into all aspects of their customer’s experience, such as adoption, usage, limitations, bugs, growth, renewal predictability, help desk tickets, and real time communications.

Finally, Dustin concluded that, “if the technologies offered to help customer success professionals do not impact the renewal rate and ultimately the recurring revenue of it’s customers, this focus on ‘Customer Success’ will become a fad and the focus will retreat into the comfortable, proven hands of the sales account management discipline.”



Chris Duskin

VP of Marketing

extole.

Chris' role at Extole is VP of Marketing, and as such, he is tasked with wearing many hats including all marketing activities as well as the delivery of all the services the company provides to customers such as consulting services, creative services, and customer care.

Chris explained that Extole's referral platform helps marketers acquire new customers at scale by rewarding their existing customers. They have an immense amount of data about program performance at the individual customer level, at the industry level, and in aggregate across the entire customer

“The account management role includes understanding expectations made in pre-sales, product capabilities and performance, services execution, product usage and feature adoption, the people involved, and potentially many other factors.”

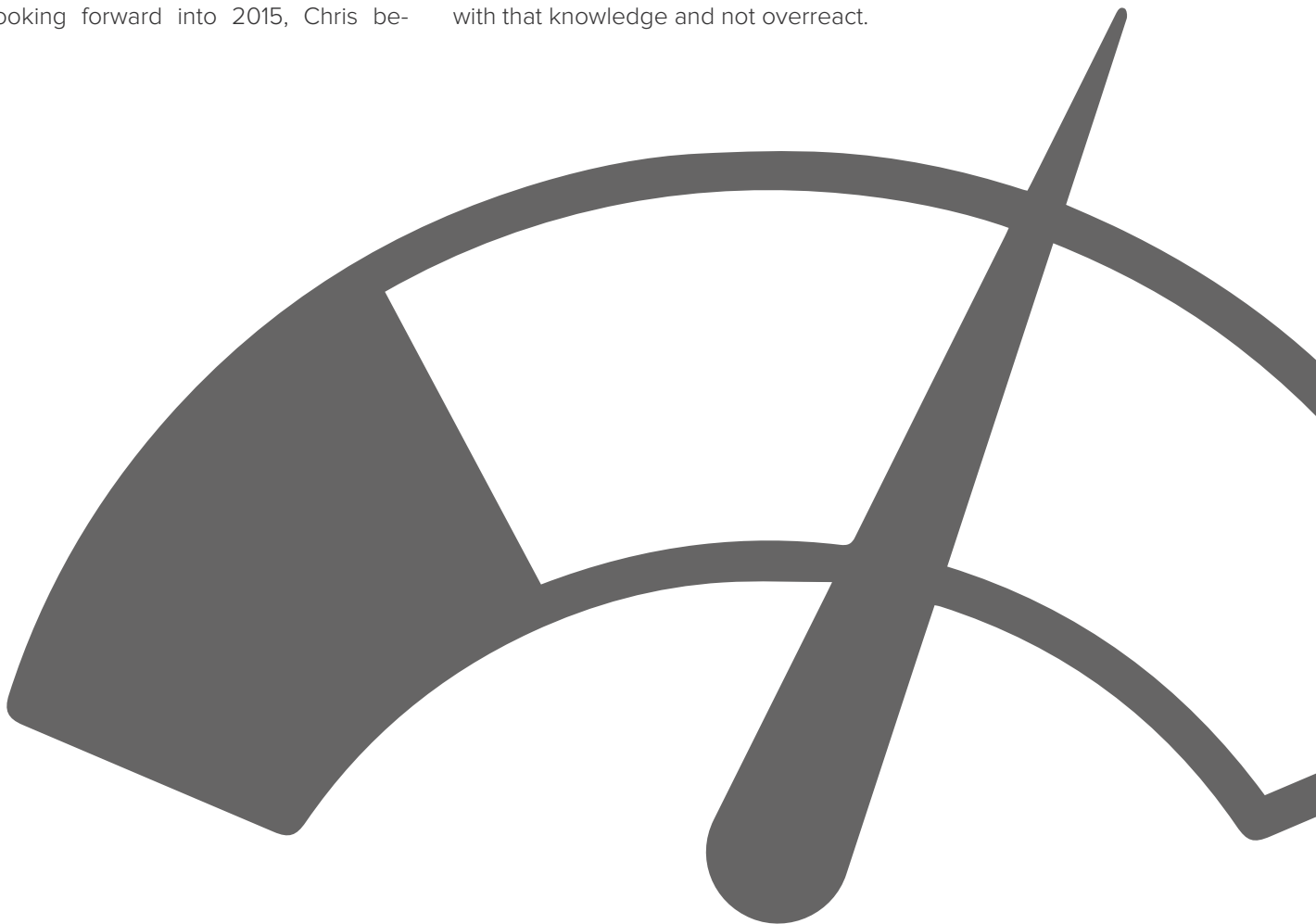
base. Their services team uses this benchmark data to identify opportunities for better program results with the primary goal of consistently improving those results. Their secondary goal is around time to launch for Extole's customers, and Chris and his team are continually exploring opportunities for faster and better launches. Finally, and very closely related to the primary and secondary goals, they intently measure customer and revenue retention.

The big change Chris saw in 2014 relating to account management was around the adoption of a broader approach around how account managers engage. Chris commented that, "Account management is so often considered in relation to sales. The trend now is for a customer-focused lens and for active account managers' participation all along the customer journey. For account managers, a front-and-center role isn't necessarily a new concept, but for their companies it can be. Both supporting and driving this trend is the new crop of tools designed for account managers. With these tools, account managers are smarter and faster and can marshal internal resources more effectively." Chris believes that these tools then develop smarter and timelier account management engagement, which benefits the customer. He believes the vendors become better service providers delivering more value as needs, problems, and opportunities can be much better anticipated.

Looking forward into 2015, Chris be-

lieves that account management should lead the charge on helping their own companies really understand how and why customers succeed and why they may not, which is very complex. Chris commented, "The account management role includes understanding expectations made in pre-sales, product capabilities and performance, services execution, product usage and feature adoption, the people involved, and potentially many other factors." Chris explained that one way to think about this overall change to account managers is in terms of NPS, which coincidentally also allows customers to complete free-form comments that can be immensely valuable.

Chris concluded by stating the benefits of such insights could include being "so smart about each customer that you have detailed insight all the time". Chris believes that this is what customer success platform providers are working towards which then leads into knowing and understanding how to best act with that knowledge and not overreact.





Derek Cordon

Sr. Director of Client Services



As Sr. Director of Client Services for Domo, Derek is responsible for the client services team that manages Domo's strategic accounts. His team is comprised of very seasoned account management professionals – most with over 15 years of sales, account management, sales engineering, or similar customer success roles. As Domo is a fast-growing and innovative SaaS company, the number one team objective for success is retention, and as such, his team is incented on customer happiness which is measured via retention, expansion and referenceability.

Derek commented that 2014 was a pivotal year for Domo as they had been selling their product for about 2 years and in 2013 started selling heavily into the enterprise space. Because of this, 2014 was the first year of significant enterprise renewals for Domo and it included some shifting in how they managed enterprise level accounts and expectations.

Enterprise level customers are different than mid-market customers, according to Derek. They expect a much higher touch and require more attention from the vendor. A vendor must bring real value to each engagement and be viewed as a trusted advi-

sor. He commented, “we need to constantly improve the way we handle accounts. That means being more proactive in terms of taking care of clients and be sure those lessons learned influence all of our business.

In 2014, Derek stated that his team went from an remote engagement environment where most client contact happened over the phone to actually having live touch points with larger accounts. He and his team firmly believe that being face to face with a client on a periodic basis builds strong business relationships. As a result, Domo saw huge gains in client relationships due to this small change alone. Derek commented that he's never seen such rapid adoption in any other software company comparable to what

“An important KPI for us will be whether our clients are hitting their KPIs.”



What do you think?
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Domo is experiencing within their customer accounts, partly due to their high touch engagement model.

Derek believes that in 2015 and beyond, there will be a need for customer success professionals to be even more rounded in their skill sets as clients will require deeper industry knowledge from their software vendors. Collaboration is a huge piece of this, according to Derek, and the ability to quarterback a client throughout their journey with the company in a timely manner will be absolutely key.

Derek and his team are focused on helping their clients deliver on their own key goals. He commented that, “An crucial key indicator of our success will be whether our clients are exceeding their Key Performance Indicators.” He believes there is a great need for their clients to be able to report in a timely fashion on all aspects of their business. It is imperative to truly UNDERSTAND the client and their goals, how they view data, as well as how they make decisions. He believes that the more one understands about the client and how they function, the better the customer success professional can perform. For Derek, visibility into all of these data points and more is absolutely key for success.



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“If there’s one thing a customer success manager should remember, it’s that you need to view the problem from the customer’s eyes.”



Greg Meyer
Customer Success Champion



As a Customer Success Champion at Rival IQ, Greg Meyer focuses on improving the customer experience and helping customers succeed at each stage of their relationship. His overall responsibilities include customer satisfaction, engagement, onboarding, and technical support. Greg also plays a key stakeholder role in the development of internal tools for customer service at Rival IQ. His typical day begins with a demo or two to a prospective customer, proceeds to answering questions for current and new trial customers, and includes working with their internal teams on product improvements and process improvements.

At Rival IQ, customer success is measured by “whether the customer has a great day,” how many customers start trials, and how many customers leave. Greg helps that process by learning from customers what matters for their business and the team delivers customer “wow” by going above and beyond with their service.

According to Greg, 2014 was the year that customer success and account management became a distinct entity from customer service and sales. He believes, “the main reason has to do with the need in many SaaS businesses to build an ongoing pipeline and to minimize the churn among the existing subscriber base. As web businesses get more sophisticated, taking care of the customer and quantifying the benefit so that it can scale is critical.”

In 2014, “It was good enough to be polite, timely, and correct to win a customer. But in 2015 those things are now necessities and not sufficient on their own,” said Greg. “Truly making the customer successful demands an in-depth knowledge of their business and as such, customer success software needs to assist these professionals attain that goal by helping them achieve more than just a ‘playbook’ – these software companies also need to become a trusted source of information if account growth and expansion is the goal.”

Customers now expect more, says Greg,

“they expect the level of service for any company to be as good as the consumer companies they deal with like Amazon and Apple.” What does this mean? In Greg’s words, “soon, using customer data to deliver a differentiated experience will no longer seem ‘creepy’. The key to this will be explaining to the customer what data was used and why it was used to make their experience better.”

Greg thinks successful customer account managers need to balance the brand with the expectations of the customer and the needs of their business to build a relationship that will last longer than the initial trial honeymoon. According to Greg, customer

success professionals need to have Efficiency tools such as case management software or CRM functionality that helps them to know more about their customers, Context tools to understand what’s happening with customer today in the different interactions across the company, and Content tools demonstrating how they should respond in order to represent the on-brand voice of the company. Tools that make these activities easier will be successful in 2015 and beyond.

To Greg, the focus on success is simple: “If there’s one thing a customer success manager should remember, it’s that you need to view the problem from the customer’s eyes.”



What are your customer success predictions for 2015?

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