

Session #2

Customer Success Leadership
Bootcamp Webinar Series - Q1 2024

Launching Scaled Programs to Support a 1:Many Enablement Approach for Your Customers

Tuesday, February 13, 2024
1pm EST/10am PST



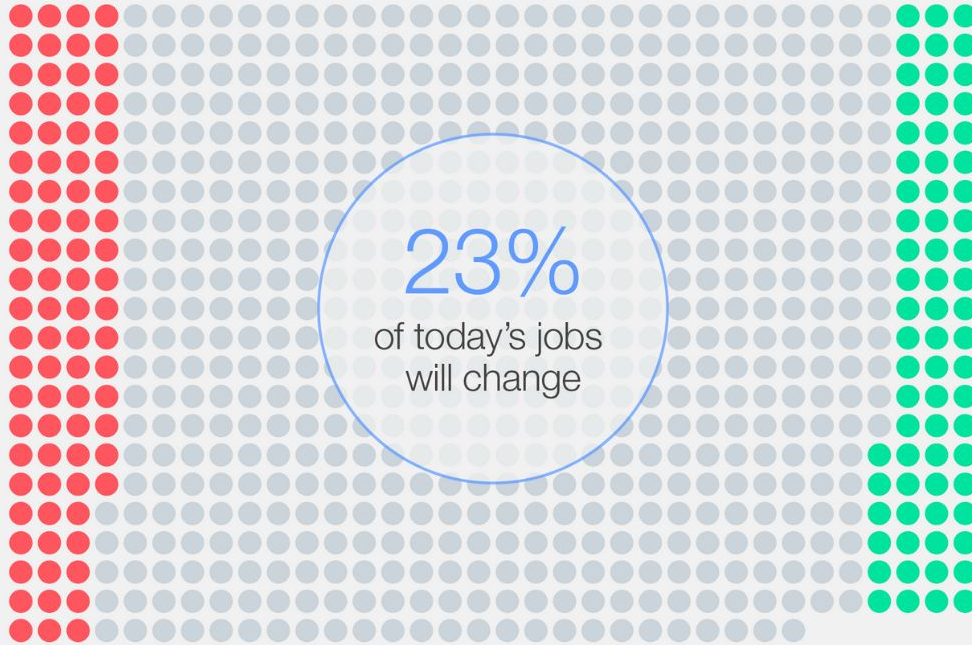
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client**success**

Your Customer Base Is **Growing**,
Your Product is **Evolving**, Your
Team Is The **Same Size**,
Yet Everyone Needs to be **Enabled**

Total job growth and loss



○ One million: ● Lost jobs ● Stable jobs ● New jobs

Have you seen turnover in your customer contacts over the past 12-24 months?

Do these new users know how to use your software?

Does their current deployment of your software mirror their current needs?

IDENTIFY THE AREAS OF OPPORTUNITY

WHAT DO YOUR CUSTOMERS NEED MOST FROM YOU?

Technical support with ticket management on bugs/ questions

Platform training for new features and functionality

Enablement on reconfiguration and best practices on how to use your software

Industry Education around evolving trends in your space

Professional Services to help them expedite deployment

A photograph of two red apples on a wooden surface against a textured wall. The apple on the right is significantly larger than the one on the left. The text 'START SMALL' is overlaid in the center in a bold blue font.

START SMALL

PROGRAMS TO CONSIDER

7 INITIATIVES



Self Guided
Onboarding



Webinar
Trainings



Paid
Services



Support
Office Hours



Community



Leadership
Workshops



Customer
Marketing

SUPPORT OFFICE HOURS

- Reduce Support ticket volume
- Reduce Customer Outreach to CSMs chasing ticket updates
- Decrease time to resolution
- Reduce the volume of exchanges with Support
- Improve CSAT



SUPPORT OFFICE HOURS

- **DEFINE THE FORMAT:** Will this be an open forum? Can customers pre book time slots? Is it open to all segments or just a specific cohort of your customer base? Same time each week? Is it weekly or bi-weekly?
- **IDENTIFY THE OWNER:** Who in your organization is best equipped to run this program? Will you rotate or have 1 program manager? What skills do they need? What are the expectations for them?
- **SCOPE THE INITIATIVE:** How are you encouraging customers to use this time? Is it to follow up on tickets? Ask questions? Triage issues? Product feedback?
- **ENABLE CUSTOMERS:** Enable customers on how to take advantage of the new program. What will they get out of it and what is the benefit to them? Why should they want to participate?



SELF GUIDED ONBOARDING

- Reduce time and resources to onboard customers
- Available on-demand to onboarding new contacts
- Decrease time to value
- Improve product adoption



SELF GUIDED ONBOARDING

- **DEFINE THE FORMAT:** Will onboarding be available in a portal? In app guides and training? Group facilitated Onboarding? Onboarding tool facilitated? Spreadsheet? Written? Video? Combo?
- **IDENTIFY THE OWNER:** Who in your organization is best equipped to run this program? Will you have multiple folks work on this OR would appoint one person? Is this a team effort?
- **SCOPE THE INITIATIVE:** Will this be used for all customers or just some segments? Is this supplemental or is this the main program? How will you track and measure this?
- **ENABLE CUSTOMERS:** Determine when and how communication about this program will be communicated. Likely better to set expectations in the sales process. Kickoff call to confirm expectations?



COMMUNITY

- Enable customers to help one another
- Share information and insights at scale
- Facilitate connections and relationships across your customer base
- Improve cross-functional collaboration with customers (sales, product, support, marketing, leadership etc.)



COMMUNITY

- **DEFINE THE FORMAT:** Will your community efforts be supported via a community platform? Slack? Email? Webinars or office hours?
- **IDENTIFY THE OWNER:** Who in your organization is best equipped to run this program? Best structured with an owner who is empowered to work with and delegate to others ... or FTE?
- **SCOPE THE INITIATIVE:** What will be the initial priorities around community initiatives? What are the core objectives of your community program? How's it being measured?
- **ENABLE CUSTOMERS:** Determine when and how communication about this program will be communicated. Communicate the value proposition to encourage engagement. Track activity and engagement to see what is working.



WEBINAR TRAINING

- Scale end-user and customer training and enablement
- Alternative way to keep customers engaged with your brand and content
- Bring together various personas for knowledge sharing and ideation



WEBINAR TRAINING

- **DEFINE THE FORMAT:** Live webinars? Recurring? Series? Panel Discussions? Customer or company led? Record and make available ondemand.
- **IDENTIFY THE OWNER:** Who in your organization is best equipped to run this program? Do you have all of your webinars owned by the same person or different members? Cross-functional teams?
- **SCOPE THE INITIATIVE:** Webinars for training and enablement? Collaboration and idea sharing? Q&A format? Train the trainer? Product Release updates?
- **ENABLE CUSTOMERS:** Communicate with customers about the value of the sessions, content and how to take advantage of them.



LEADERSHIP WORKSHOPS

- Connect leaders with one another
- Tackle industry topics
- Leverage Learnings and Best Practices and tie it back to your product



LEADERSHIP WORKSHOPS

- **DEFINE THE FORMAT:** In person? Virtual? Small group? Break out? Regional? Persona
- **IDENTIFY THE OWNER:** Who in your organization is best equipped to run this program? Do you have all of your webinars owned by the same person or different members? Cross-functional teams?
- **SCOPE THE INITIATIVE:** Webinars for training and enablement? Collaboration and idea sharing? Q&A format? Train the trainer? Product Release updates?
- **ENABLE CUSTOMERS:** Get buy-in on the topics and the format; partner with some customers on coordination; send pre and post surveys.



PROFESSIONAL SERVICES

- Charge for consulting and services and get customers to scope the work they need
- Drive a new revenue channel and staff accordingly
- Improve product configuration, adoption and value realization
- Staff augmentation for customers who do not have available resources



PROFESSIONAL SERVICES

- **DEFINE THE FORMAT:** What types of packages can you create and scale? Are there specific challenges you want to solve - integrations? Configuration? Custom dev work?
- **IDENTIFY THE OWNER:** Do you have someone today who can deliver these services? Is there someone on the team who can do it part time? Would CSMs do it as a paid engagement?
- **SCOPE THE INITIATIVE:** Onboarding packages? New integrations? Reonboarding? Deployment optimization? Custom development? Workshops? Training and enablement?
- **ENABLE CUSTOMERS:** Educate customers on the new packages or services available. Capture customer success stories and place it on your website or create 1 pagers. Enable CSMs with qualifying criteria and have them pitch it.



CUSTOMER MARKETING

- Create new content to support product releases and enablement
- Help identify customer advocates to participate in case studies, speaking engagements and
- Programs to help with identifying new upsell or cross-sell opportunities
- New content for training and enablement



CUSTOMER MARKETING

- **DEFINE THE FORMAT:** What are the initiatives that will drive the most value for your customers? What are the content gaps that exist today? What will have the greatest impact on risk or growth?
- **IDENTIFY THE OWNER:** Ideally Marketing would own this but could be a career pivot for someone in CS interested in shifting roles.
- **SCOPE THE INITIATIVE:** Depending on the initiatives you choose to start with plan what the program will need to look like for it to be successful.
- **ENABLE CUSTOMERS:** Inform customers of upcoming opportunities to engage more creatively with your brand to build their brand. Allow them to register for or opt into new initiatives.





TAKE NOTE

1. Start with the initiatives that will have the biggest impact on your business and customers
2. Find the right resources to own the new programs - Align skill and will
3. Collect feedback from customers before and after rolling these out
4. Fail fast and iterate
5. Make sure to have leading and lagging indicators

THANK YOU
Q&A