HOW TO BECOME AN ELITE CUSTOMER SUCCESS LEADER

presented by

clientsuccess

Introduction

The customer success (CS) profession has gone through a major transformation over the last ten years. It used to be common that the CS team in most companies looked more like technical support and spent most of their time helping with reactive tasks to solve customer problems. Today, the best CS teams and leaders have evolved into a key strategic growth lever of any SaaS business.

As the role of customer success has changed, so too has the role of the customer success leader. While ten years ago the best CS leaders were technical wizards that understood products at a deep technical level, the CS leaders of today need to master revenue retention and growth.

In many cases CS leaders today own a large revenue number and oftentimes find themselves responsible for all retention, up-sell, cross-sell, and renewals across the customer experience.

Along with owning the installed base revenue target, CS leaders must now represent the CS team in executive meetings and champion the voice of the customer throughout the entire company.

In this eBook we'll explore several topics that will help you to establish yourself as a customer success leader and build a great team that focuses on retention and growth.

Here are some of the items we'll explore:

- Skills of a Great Customer Success Leader
- Your First 100 Days as a CS Leader
- 3 Strategic Pillars of a CS Leader
- Listening Techniques of Great CS Leaders
- Steps to Build an Internal Quarterly Business Review Process
- Lessons Learned from State of Customer Success Survey

We hope you enjoy reading it!

Skills of a Great Customer Success Leader

The role of a customer success leader has become increasingly complex. As platforms themselves become more innovative and functional, and as customers become more well-versed in how these solutions impact their business, CS leaders are faced with more questions and challenges than ever before. While working with customers takes a certain temperament, there are also specific skills CS leaders must work on and develop in order to be successful.

In order to deliver the best customer experience possible, customer success managers and leaders should develop the following critical skills:

Problem Solving and Resolution

The number one and two critical skills of successful customer success leaders are problem solving and resolution skills. There are always challenges during the customer lifecycle. The ability for the customer success manager to find out the core customer issue and build out a plan or resolution aligned with a customer is not an easy task. The best customer success managers have learned these two skills and use them daily to drive success with customer accounts. The end result of this skill is trust and customer account growth. Learn more about strategies to scale customer success in this eBook.

Expectation Setting

Expectations set correctly drive customer success. Expectations set poorly create a poor brand and customer experience. In a perfect world, this wouldn't be a problem because marketing and sales have done their job to set proper expectations from the start.

Many times a customer success manager must reset expectations properly even when it seems like the customer was oversold. This is why this skill is so critical for successful customer success managers.

Listening & Seeking to Understand

Listening is another important skill successful customer success leaders use to drive success with customers. Successful customer success leaders know that listening to your customers is key to establishing strong relationships. Without strong listening skills, you won't gain the respect and trust of your most important business relationships. Stephen R. Covey said, "Most people don't listen with the intent to understand; they listen with the intent to reply." It's not just about listening, it's about understanding so you can deliver a solution that meets the customer's needs and helps them succeed.

Level Headedness

If there's one thing customer success leaders can count on, it's curve balls. Whether the craziness comes from negotiations, confusion, or customer escalations, it will be there, and when it hits, CS leaders and managers can't lose their cool. Customers are counting on their CSM to help them and be a support system through the onboarding process. No matter how bad it gets, CSMs should never be the ones exploding – even if you want to. Keeping a level head is crucial and cannot be understated.

Data Integration

While it might not seem like it off the bat, understanding how to handle customer data is a huge part of a customer success leader's day-to-day job. Having a good handle on how this process works, how to keep data secure, and how to coach your customers through different workflows are all skills a CS Leader should have. Additionally, being able to explain to customers what's happening with their data will help make them more comfortable and trusting.

Solution Knowledge

This one should be a no-brainer, but all CS Leaders should be considered a subject matter expert on the platform, hardware, or solution they're working with. This will not only make it easier for you to answer any questions that come up, but it will allow you to actually speak the 'language' when talking to customers. Your customers have already made the decision to purchase your product and they've already made a serious investment in your technology. They don't want another sales pitch. They want someone who will be able to talk to them on a personal level and get right to the value of the partnership.

Empathy

Empathy is another skill that all CS Leaders should have, and it's sometimes considered the most important skill. CS Leaders should have the ability to understand where customers are approaching problems from, how they are feeling about specific milestones, and what they are thinking about certain functionality. Talking about and focusing on feelings may sound sappy, but it's a must in any customer-focused business. Empathy and understanding is what sets a great CS Leader apart from the rest, and it's what customers are looking for in a vendor relationship.

Grit (Tenacity)

This is more of a personality trait than a skill, but it's an winning attribute of successful CS Leaders. Being a customer success leader or manager is not easy. It requires grit and tenacity to never give up and to find every way to make your customers successful. Grit is the mindset that you will use all the resources at your disposal to deliver success even when it seems impossible.

What other skills do you see in successful customer success managers?

Build Out Your Customer Success Team with the Right Set of Skills

Successful CS leaders spend time identifying the skills needed on their teams to drive long-term customer success. They *learn* the skills, *train* the skills, and try to *hire* for those who are already proficient in the skills. The right set of skills, grit, and attitude are the makeup of the best customer success teams in the world.

Learn from the Experts:

Christine Vienna Knific is building her 3rd customer success team from the ground up right now. She has done this successfully twice before, and now she's going to share what she has learned and how she is applying those lessons this time around! Watch the webinar by clicking on the link below:

Your First 100 Days as a Customer Success Leader

In any new role, the first 100 days are critical. You're not only establishing your credibility to your new coworkers, but you're also making a case for the kind of professional you're going to be in the future.

For executives in particular, this is the period when you decide the type of leader will be, how you will manage your team, and the metrics on which you will measure success.

As a CS leader, your introduction period needs to extend to both internal team members and the external customers you are working with.

In this section, we'll provide a sample 100-day plan that provides a rough outline of key milestones you should aim to achieve.

Week 1: Meet Your Team

This is the first step in any new position, and an executive is no different. Make sure you know your team members, understand the organization of your department, and know exactly who reports to whom. This also includes meeting up with other executives across the company with whom you'll be closely working.

Make sure you establish good rapport with directors and managers from the sales, marketing, and technology departments, as your team will more often than not work closely with these team members. Knowing everyone's responsibility and understanding the dynamics of your department (and the entire organization) will prove invaluable as you grow and become more involved in your new role.

Weeks 2-3: Understand Key Processes

This will probably take longer than two weeks, as understanding the customer success process at your new company is an ongoing task. This includes areas like how you onboard new customers, which customer success managers (CSMs) work with what types of customers, and how the upsell/renewal processes work.

There are many responsibilities and roles within a customer success department, and it is your responsibility to not only understand, but effectively manage all of them. Knowing how the CS team works – and how KPIs are tracked and measured – will help in the future when you want to start implementing new processes or workflows.

Weeks 3-4: Initial Vision and Goals for the Team

As a new CS leader, it's vital that you understand the company's direction, and then apply your team's vision to feed into the larger strategy. Your team will be looking to you for direction from your first day onwards, and perhaps most importantly, they'll look to you to be inspired by your vision for the team and how you plan to help them succeed.

Within the first several weeks, get the team together to share your learnings of the company so far, and then carefully explain your vision and goals for the CSM team. Just keep in mind (and be sure the team understands) that, while you're new to the role and certain aspects may change, you have a strong vision and a plan that's realistic and challenging at the same time.

Weeks 4-7: Learn About Key Accounts

Now we get to the fun part. You probably have been involved in customer meetings before this point and have probably felt fairly comfortable, but this step goes a little bit further. Learning about key customer accounts – why they chose your solution, what they were sold, how they were onboarding, and their interactions with support, can be the difference between a churned customer and a long-term relationship.

While you're at it, work with your counterpart(s) in sales to familiarize yourself with some critical opportunities or prospects. Just remember that as an executive you will most likely be called in on various new deals or upsell discussions, and it is crucial that you are well versed in individual customer use cases, even if you have only been there 5 weeks and are dealing with a customer that has been working with your company for 5 years.

Weeks 8-10: Meet Key Contacts

Depending on need, you may meet with key contacts during your first days at your new company. This is the stage where the external networking begins. As a CS executive, you should make it your goal within your first few months to get to know other executives at your customer accounts. This includes everyone that could have a say in renewal/upsell discussions (CEO, COO, CFO, etc).

Internally, other executives at your company may eventually lean on you for introductions or references. Meeting and networking with key customer contacts is key for any CS executive, so getting started early in your tenure will only make it easier as you grow and mature in your new position.

Weeks 11-14: Start Implementing New Processes

Now that you're getting settled, you've started to build relationships with your new team, and understand the processes in place, you can finally begin to roll out changes like:

- Changing your team's measurement or compensation structure
- Adjusting the onboarding process
- Improving the upsell, cross sell, and/or the renewal process.

Now that your team is comfortable with you and your personality, you can make these changes with credibility and conviction. With other executives on board, you can begin establishing customer success as the driving force of your entire organization.

There you have it—good advice for your first 100 days at a customer success executive. Congrats on the new gig and you got this!

Learn from the Experts:

Emilia D'Anzica, Founder of GrowthMolecules and one of the top minds in customer success, gives advice on the importance of building your 100-day plan and how to make it successful. Watch the webinar by clicking on the link below:

3 Strategic Pillars of a Customer Success Leader

As a customer success leader, you spend every day making sure your team is working towards creating the ultimate customer experience so your team can drive long-term retention and growth.

When company leaders have confidence in the strategies in place, a trickle-down effect occurs with managers, team leads, and, ultimately, with customers. It drives focus and confidence, which are two key attributes of winning teams.

Here are three of the most important things CS leaders should be thinking about now:

1. Make the Customer Success Department a Critical Pillar of Your Company's Business Strategy

At ClientSuccess, we believe that customers should not only be first priority for your customer success department, but they should be first priority across your entire organization. We like to use the phrase "the customer is true north" which means that every part of the company, from product to sales to HR, is built around what customers need to be successful. As a customer success leader and someone who plays an important role with the executive team, you need to be thinking about creating a culture of customer-focus across all departments.

This starts with the support of executives across the company—all the way up to your CEO. Customer success can become a pillar of innovation and communication if you have the backing from everyone in the company. This will become evident in new success stories coming out of marketing, higher referral rates during new sales deals, and more efficient invoice processes. When all departments are working together towards customer 'true north', you'll quickly see how customer success becomes the catalyst to profitability growth.

2. Have All Key Customer Success Metrics Defined and Tracking

Now is the time to really take a step back and check the numbers. Are you tracking critical metrics correctly? Is there something missing that you or your team members need to understand in order to be most effective? Could there be an easier way to collect or visualize the data you have?

Perhaps there are areas where you haven't considered collecting metrics or data yet, or have identified as areas of need, but haven't yet taken action. Make sure you keep it simple. These could include usage patterns, NPS scores, and interest in new product features. Make sure you are tracking feedback and comments from all users, whether the sentiment is positive or negative.

Tracking these critical metrics and the overall customer health will not only give you a better idea of where to focus time and energy in the upcoming months, it will also give your counterparts a better understanding of how customer success is impacting your business as a whole.

3. Build a Culture of Customer Retention and Growth

This should be an ongoing goal of any CS leader. Creating a lasting culture of customer goodwill and trust is a natural way to help feed renewals and expansion revenue. There are multiple ways to keep this top-of-mind:

- Know your client's definition of success. Move past what to why.
- Know how your product drives your customers goals and KPIs.
- Stay engaged with customers even when there is no real action needed on your part

There you have it—three strategic pillars that can help you step back to then help you launch forward with customers at the heart of the strategy.

Learn from the Experts:

Rav Dhaliwal, Partner at Crane Venture Partners, shares how customer success can "Get a Seat at the Table." Rav shows us how to define the importance of customer success at your company so everyone can see how much value you really add. Watch the webinar by clicking on the link below:

6 Listening Techniques of Great CS Leaders

As a customer success leader, you know that listening to your customers (both external customers and even internal customers) is key to establishing strong relationships. Without strong listening skills, you won't gain the respect and trust of your most important business relationships.

To reiterate the point made above from Stephen R. Covey that most people only listen with the intent to reply, not understand, for CS leaders, this is detrimental to not only your role, but your entire company.

There are countless books and resources on the importance of listening across all areas of life: from listening to your significant other, raising children, teaching employees, or negotiating on a house. Clearly, listening is one of the most important skills that we can learn.

But in this section, our focus is specifically on how customer success leaders should listen – both to their internal customers (those within the same organization) to external customers (those that are paying your company for a product or service). We'll give specific examples and illustrations for customer success leaders to excel at the art of listening:

1. Listen First

Often times, customer success leaders will dive into conversations right in with a list of questions like:

- How do you like XYZ feature?
- Can you tell me about the problem you have with X?
- Why are you considering leaving us?

While asking questions is certainly a gateway to get customers talking, this format leaves little room for the customer to provide direct and honest feedback about what's on their mind. By asking questions, you are directing the conversation to what you want to hear, not towards what the customer wants to talk about.

Rather than starting with a barrage of questions, write them down so you can come back to them later. Then, start by asking a single open-ended question such as, "how are things working out for you this week?" By asking a simple question like this, the customer can then dictate where to steer the conversation. If they are indeed experiencing a problem, they will likely bring it up on their own.

For customer success leaders, many of your customer conversations likely happen over the phone. This can be tricky since you can't read facial expressions like you could on a video call or in person. If you *have* to use a phone, make sure you are actively listening and following along by with simple words like “got it”, “okay”, “makes sense”, etc. so the customer knows he or she has your full attention.

2. Seek Clarification

Once the customer begins talking, take notes rather than interrupting or cutting them off in the middle of a story or dialogue. Let them keep talking – this is gold! Your customers love knowing that you’re actively listening and taking notes during the conversation. When the time is right and the customer has stepped back to let you respond, now is the time you can refer to the questions you wrote down initially for the call.

Take the time to ask specific questions relating to what the customer has confided. Make sure you fully understand the information before you move onto another subject.

3. Repeat Back

How does your customer know you truly understand what their situation, request, problem, or compliment is? After you have asked clarifying questions, be sure to repeat the information back and ask if you understand accurately. So often, we believe we understand the situation and take action on what we believe is the problem, without actually confirming the data points. Taking action on a situation without truly understanding it can be more detrimental than good – even with the best of intentions.

Once you have repeated the information back to the customer and they acknowledge you’ve got it right, then tell them what you plan to do with it so they know it won’t disappear into a black hole. It’s important to ensure your customer knows something is happening with the valuable information they have just provided.

4. Take Action

If you told the customer you were going to take a specific action with the information they shared, now is the time to put the to-do into motion. Not all data points are crucially important, but all deserve to be recorded and remembered. Whether you need to create a calendar reminder to bring up the information in your next CS team meeting, or whether you need to pick up the phone and act on something more urgent, do it immediately. Waiting to take action will simply create dust and lose you trust with the customer if he or she begins to notice nothing happens with the information they entrust to you.

Bonus Tip: Most CS leaders don’t have time in the day to pause and take action if it’s not a fire alarm. To ensure nothing gets lost in the shuffle, carve out time every morning to address problems or act on information from the previous day. Use that time every morning to as a gut check for how your customer information is being acted upon across the organization.

5. Report Back

One of the most forgotten steps entails reporting back. So often customers pass on great information that may have helped the product team fix a bug, or may have created a more seamless invoicing process, or may have helped streamline a service offering. This customer input is gold, but unless they know their information is actually being taken to heart and considered, you can bet they won't continue sharing. Sharing information in this way takes time and energy away from the customer's job, so reporting back is one easy way to thank them for their valued input. Let them know where their feedback is making a difference, and what they should expect in the future.

Bonus Tip: Send out a thank you card or gift when you receive valuable information from a customer. This over-the-top thank you will be remembered, and the customer will know you're carefully considering their input.

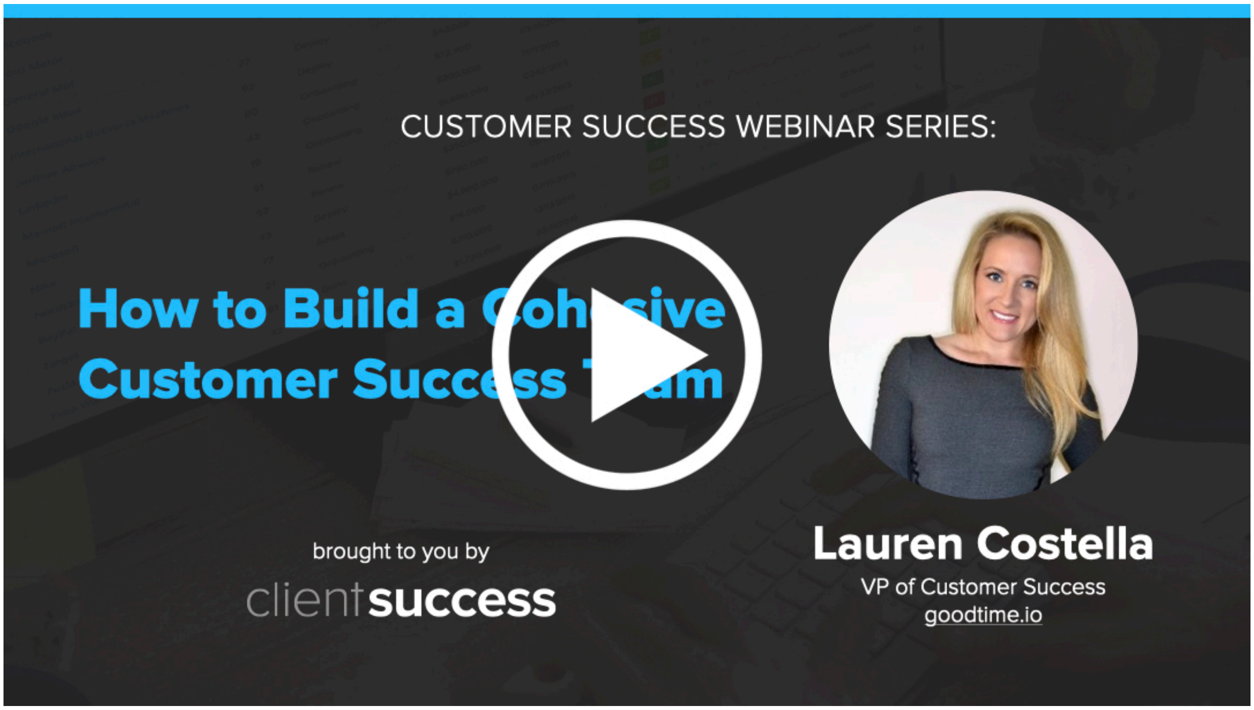
6. Seek Input & Repeat

Once you've reported back to the customer and the input has either been considered or taken into action, go back to your customer and ask for even more input. Ask them how the process could have been better, or what else is on their mind. Perhaps use another open-ended question to dive deeper into another area of the business.

The key to remember is that listening to customers will produce more opportunities for listening, so the goal should always be to encourage your customers to remain open and honest. When they see you, their customer success leader, listening and taking action to their feedback and concerns, you'll create the best outcome. The outcome of trust.

Learn from the Experts:

Lauren Costella from Goodtime.io shares her insights on "How to Build a Cohesive Customer Success Team." You'll learn some important strategies like: 1) What is a cohesive team and why it matters; 2) What do you need to build a team; and 3) A few practical tips to implement today. Watch the webinar by clicking on the link below:



Build an Internal Quarterly Business Review Process for Customer Success

As your SaaS business grows, you'll need to establish processes to ensure you hit your revenue goals. Starting a Quarterly Business Reviews (QBRs) with your customer success teams will help you operate at a high level and achieve your goals.

Keep in mind we're focusing now on your internal QBR process, this is different than a customer QBR, or Executive Business Review you might hold with customers.

What is a Quarterly Business Review (QBR)?

In a QBR, a company uses its past to guide future planning and forecasting. The process is simple and powerful. But the key is that the executive team must conduct it well and in a way that all cards are on the table, with no fear of honesty.

But first, what exactly is a QBR and how should existing business teams think about this practice? According to Steven Rosen, Executive Coach, "A quarterly business reviews consists of a formal review meeting between a front line manager and one of his/her CSMs. The purpose of such a meeting is to review the last quarter's performance and to discuss plans for the next quarter."

In short, your customer success team can use QBRs as a strategic practice to review customer success over the past quarter with their managers, and use the time to strategize about how to renew customers and work through upcoming challenges and see opportunities in a new light. Our Customer Success Leaders Toolkit also provides insight into building and scaling high performing teams.

Before You Can Move Forward, You Must Look Back

Maybe you've been part of a team or company where quarters passed on, but nothing ever changed in the customer success process; nothing was reflected upon after a quarter ended. You were just told to "get that renewal". Or, maybe you've been part of a team were quarterly reviews were like going in front of the judge. Even before the QBR started, you felt like you were walking into a punishment – you felt like a victim, regardless of whether or not you hit your targets.

In reality, though, a QBR should be a collaborative time to understand from ALL angles what worked well, what tools were used or weren't used, what went wrong during the quarter, and what will be different in future quarters. Check out our 5 steps for hosting a successful existing business QBR below:

5 Steps to Host a Successful QBR for Customer Success:

1. Make the Process Known, Easy & Efficient

If the QBR process is difficult or confusing, your team will dread it. To ensure QBRs are painless (and actually beneficial!), you must document what everyone needs to do – both for those leading the QBR as well as those presenting.

Also, if you have one, make sure your team has all the data they need (reports, dashboards, etc). Here are a few things to consider when putting together a "QBR Expectations Document" to share with participants:

- Who should attend and what are the respective roles? (leader, presenter, moderator, note taker, etc.)
- What materials should be prepared beforehand? What reports should be pulled? What numbers/metrics should be known? (Ensure this focuses not only on the year past, but the year ahead)
- What is the format of the QBR and what tools will be used?
- If a presentation is involved, should slides be created? Will a template be provided?
- What is the agenda of the QBR? How long should each topic be addressed? (We suggest no longer than 3 hours per QBR)

2. ALL Levels of the Customer Success Department Should Participate

From executives to customer success managers (CSMs), every individual focusing on retaining and growing customer relationships should be involved in the QBR process. It's important to structure these reviews from the top down, with the highest executive leading their direct reports through the process (Ex: CEO leading a QBR for the CRO or VP, Sales and VP, Customer Success leading a QBR for Directors, and so on).

The goal of the QBR is to review and keep the business on track. The goal of the manager should *not* be to "catch the CSM" or the manager, but rather facilitate their thinking for certain scenarios. It is important to set clear expectations of roles of both parties. CSMs and managers own their business plan and must demonstrate that they have a strong understanding of challenges and opportunities in their territory. The expectation should be that they come prepared with a plan of action to address the challenges and the opportunities in their territory/business.

The expectation is that the CSM and the manager are fully aligned on the plan of action for the next quarter.

3. Stick to a Defined Process. Always.

Was last quarter your best ever in terms of customer growth, reduced churn, and happy customers? That's great to hear, but rather than skip your QBR, that's even more reason to ensure the process lives on.

For many SaaS companies that have a gangbuster quarter with incredible growth and happy customers, it's tempting to modify the process and skip important steps, because of other "more immediate needs". But we caution you to *never* skip the process. Even after your best quarter or year ever, you should use the QBR time to reflect on what made it so successful. What's repeatable? How do we hire and train new employees to be successful? How can we grow faster in the coming year without sacrificing quality? No matter how tempting, never sacrifice the process.

If you do, your team won't take the QBRs seriously in coming quarters, or they'll see them as punishment for a lackluster quarter rather than a growth and improvement opportunity.

4. Apply Past Learning for Future Success

While it's tempting to focus time on the known (the past quarter) for the majority of the QBR, most of the value is in applying the learnings from the past quarter to the future quarter. Ensure that this is reflected in your "QBR Expectations Document" so team members know to come prepared not only with past metrics and key learnings, but thoughts on how to move into the next quarter with a solid plan. The QBR should have include these 2 outcomes:

1. Review successes and misses from the prior quarter and what was learned
2. Create a plan for the upcoming quarter

Throughout the entire QBR process, you will encounter bumps in the road and unexpected conversations – some of which may be uncomfortable. The important thing to remember is to embrace a coaching mentality rather than barrage the CSM or manager with "why did you do that?" questions, you ask more guiding questions. Questions such as: Tell me more about that. What made you respond that way? What will you do differently next time? What can we all learn and do better in this situation next time?

Finally, be sure to document the QBRs and implement necessary changes afterwards. If nothing changes after a QBR and new processes aren't enforced, they are wasted effort – and your team will know it. Keep track of performance metrics each quarter, actions each plan to take, and be sure to review those several days and weeks after the quarter ends, rather than wait until the next QBR when it may be too late.

Learn from the Experts:

Jamey Jeff, Managing Director of Customer Success Solutions at Coastal Cloud, talks about "Five Standout Strategies of Top Performing Customer Success Teams". Watch the webinar by clicking on the link below:

Insights from the Customer Success Industry

Customer Success Leaders can learn more about their roles and how they compare to other companies from the “State of Customer Success in 2020” survey by ClientSuccess.

What does the average customer success team look like?

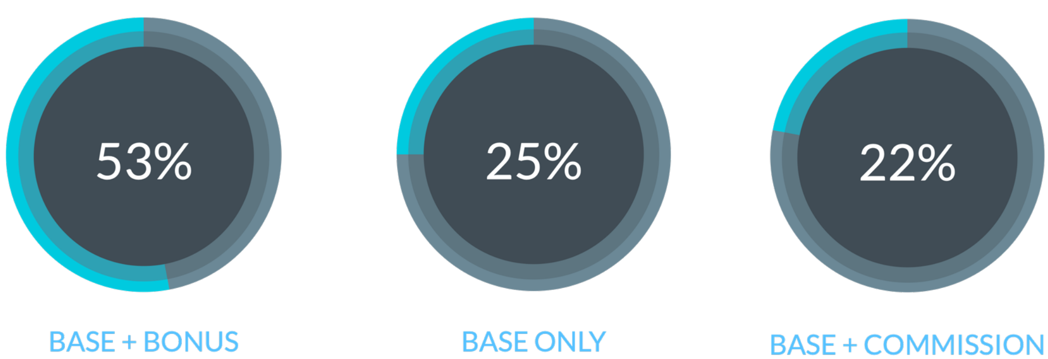
Our survey revealed that customer success has become a large and influential team in most companies. The average CS team had 18 members, and 71% of teams reported to C-level executives. Only 12% of respondents said their CS team shrunk in the past six months. At all other companies, CS teams were either holding steady or growing, even during the pandemic.

A few of the highlights:

- The average CS Team has 18 team members. The median size of a team is 8.
- For smaller companies (< 100 employees), CS represents about 13% of the workforce. For companies with more than 100 employees, the CS Team represents about 6% of the workforce.
- 58% of CS Teams have grown over the past 6 months, while 12% have seen a reduction in staff. 30% had no change.
- 41% of CS Leaders report directly to the CEO.

How do companies pay for customer success?

The first question most executives considering a customer success team will ask is how they'll pay for it. The vast majority of customer success professionals work on either a ‘base plus commission’ or ‘base plus bonus’ basis.



Linking the performance of customer success to the salaries of those who work in the field means that the cost of this function will always be in line with its benefits. This is a factor that could tip the opinions of CEOs who are hesitant to make an investment.

Top insights:

- 53% of CS Teams are paid on a "Base + Bonus" structure
- 25% of CS Teams are "Base Only"
- 22% of CS Teams are paid on a "Base + Commission"

How much does customer success cost?

Among those who know, customer success costs provided a good return on investment. These efforts cost about 10% of revenue per year while, according to other survey records, providing strong value in customer retention. Because retained customers are, in general, more profitable than new ones, customer success provides a great return on investment.

Top insights:

- 60% of respondents said the customer success costs were around 10% of revenue.
- 40% of respondents did not know the cost of customer success.

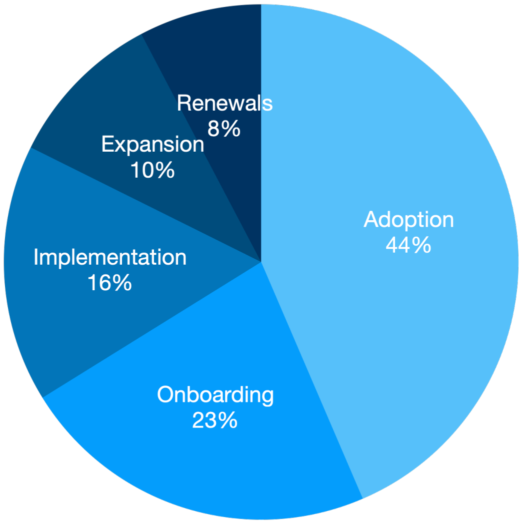
Where are CSMs (Customer Success Managers) spending their time?

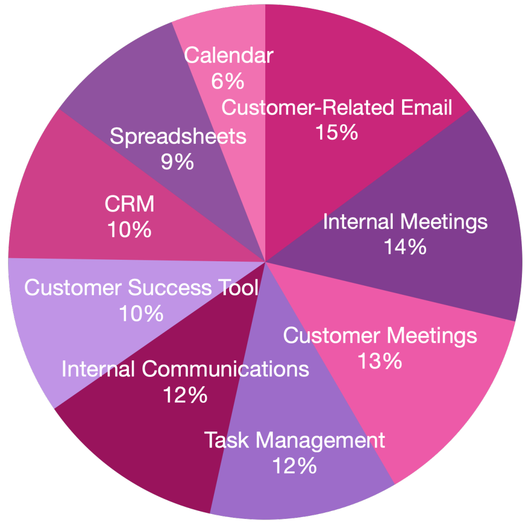
Customer Success Managers dedicate significant parts of their time to directly interfacing with customers through means that include email, customer meetings and their customer success platforms. Other time was divided between research in tools like spreadsheets and time spent communicating their findings to internal teams. These professionals are communicators, helping organizations better understand the people they serve.

Top insights:

- CSMs spend 28% of their time communicating with customers (via email or in meetings). In an 8-hour day, this would represent about 2.2 hours.
- CSMs spend 26% of their time communicating internally (meetings and communications). In an 8-hour day, this would represent about 2.1 hours.
- CS Teams are responsible for adoption, onboarding, expansion, renewals, and implementation. 68% of respondents said they are responsible for all 5 areas
- 44% of teams say they spend most of their time on adoption, followed by onboarding

Where CSMs Spend Their Time:





What are CSMs Responsibilities?

When we asked CSMs what their responsibilities were, many of the same responses came up again and again. Nearly all respondents said that they were responsible for adoption, with 44% saying they spend more time on adoption than anything else, followed by onboarding, expansion, renewals and implementation.

When it came to the information that CEOs, sales teams and others wanted most, Net Renewal and Churn were the numbers that were considered most important. Teams were tracking three different KPIs on average.

Key Performance Indicators:

1. **Net Renewal / Churn**
2. **User / Adoption**
3. **Customer Outcomes**
4. **Expansion Revenue**
5. **Gross Renewal / Churn**
6. **NPS**

Seventy percent said that they were at least partially accountable for customer retention and growth. They were most likely to share this responsibility most deeply with the product and sales teams.

Top insights:

- Net renewal / churn are the top KPI metrics for CS teams, followed by usage / adoption
- On average, a CS Team has 3 different KPIs they are tracking
- 70% of respondents say they share the responsibility for customer retention and growth with other departments
- CS Teams most rely on the product team to help them (74%), followed by the Sales team (52%)
- 70% of the teams considered their customer engagement to be “high touch”.
- 22% included a tech touch, which was almost always accompanied by some sort of human touch

What tools do CSMs use?

Customer success professionals have more tools at their disposal than ever. While Salesforce was the most-used CRM and CS platform, ClientSuccess, and productivity tools like spreadsheets, Asana, and Trello had many adherents.

The ‘Zoom boom’ has definitely hit the CS field. 62% of respondents said that they use Zoom to engage with customers. A good thing, since Zoom was among the favorite tools CS pros have at their disposal.

Some of what we learned:

- Salesforce is the most used CRM
- The most loved tools are Slack and Zoom
- The CRM is considered the source of truth for 55% of organizations. 17% consider the customer success platform the source of truth
- 72% of organizations don’t use text as a form of communication
- 98% of organizations use video conferencing
- 39% always use video conferencing; 40% mostly use video conferencing

Learn from the Experts:

Watch and download the full report on the "2020 State of Customer Success" survey, by clicking on the link below:

In Conclusion

As you've now seen, the role of a customer success leader is difficult but as more companies begin to understand the importance of installed base retention, CS will continue to grow in importance.

Customer success leaders face the unique challenge of being responsible for both customer relationships and customer revenue. We hope these resources help you to build a foundation you can use as you evolve your customer success strategy.

About ClientSuccess

ClientSuccess is a customer success management software that helps companies build relationships that last™. Revolutionizing the way SaaS companies manage, retain, and grow their existing customer base ClientSuccess provides customer success leaders actionable insights, rich customer analytics, and best practices to proactively manage success throughout the customer lifecycle. ClientSuccess helps SaaS companies increase renewal and expansion revenue, reduce churn, and maximize the lifetime value of the customer. For more information, visit http://www.clientsuccess.com.