

CSM from the Trenches

Mentors Edition

**CUSTOMER SUCCESS
BEST PRACTICES**

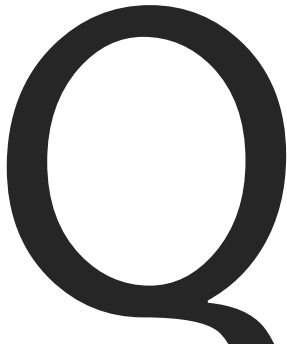
presented by
client**success**

Introduction

Customer success managers (CSMs) live and breathe the customer journey each and every day. Being on the frontline between the company and the customer allows them a vantage point that no one else across the company is privy to. CSMs have the ability to directly influence the success of clients, to help them achieve goals, and to help them grow efficiently and effectively.

The customer success space is chock full of incredibly valuable resources, tools, and thought leadership, but few of these resources represent the CSM’s unique point of view. In November 2015, one of our very own CSMs, Sam Feil, decided to do something about this lack of frontline knowledge sharing by starting a blog series that eventually became known as CSM from the Trenches. The series features both current CSMs as well as Mentors who worked their way up to management positions.

In the second eBook installment of our CSM from the Trenches – Mentors Edition series, we’ve compiled the individual responses from one of the questions we asked these featured mentors who built their company’s customer success strategy from the ground up.



What is one customer success best practice you’ve applied in the last few months that has had a positive impact on your success in your role?

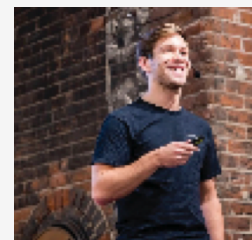


Aaron Thompson
General Partner
SuccessHACKER

“Helping my clients identify MULTIPLE Ideal Customer Profiles (ICPs) has been an emerging trend lately. So often we think every customer should be considered against all of the other customers in our base. We believe if we’re executing an effective Customer Success strategy that we should keep them all renewing forever. But that’s just not the case with some products, industries and use cases.

A more accurate litmus test for the efficacy of your strategy is, “Did the customer perform according to their proximity to ICP? And did you service that customer in an intelligent manner to prevent overhead bloat (CAC, service, maintenance, etc.) from surpassing Lifetime Value (LTV)?” If the answer to question 1 is “yes” and the answer to question 2 is “no” then that was a good customer. Even if they left, you were profitable on their lifecycle. Managing at least 3 separate ICPs for your 3 segmentation tiers is critical to understanding profitability in a subscription pricing model. I’ve been walking our clients through this exercise lately and it’s been quite eye opening for them to say the least.”

“I’ve become much less professional...at least in the traditional sense. **I do my best work when I’m being my authentic self,** and that means dressing comfortably, being honest when I don’t have the answer, keeping things light-hearted and fun, and being transparent about the fact that I’m just doing my best to get the job done well. I used to be so uptight about what clients, colleagues, and community members would think of me, and looking back, I can honestly say **it’s a much better (and more productive) time for everyone when you stop caring about how others see you, and just be your authentic self.**”



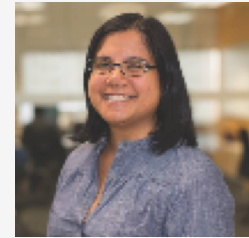
Ben Winn
Founder & Executive Director
CS in Focus



Peter Armaly
Senior Director & Advisor
Customer Success, Oracle

“I’ve reached deep into our customer success organization and **I have offered myself up as a mentor to members of our younger generation of employees.** A few have taken me up on it and (I think) they are receiving value from the things I have to say, the suggestions I’ve given, the network I’m introducing them into, and the challenges I’ve asked them to consider confronting. Has it helped me? Probably in a profound way it’s made my career even more gratifying.”

“Focusing on value with the customer; **understanding what value means to the customer and why they bought our solution.** This perspective has been essential in steering away from day-to-day conversations to more strategic ones where the customer is brought back to focusing on value first.”



Maheen Memon
Director, Customer Success
Nulogy



Benoit Bouteille
Customer Success Director
Tinyclues

“As Customer Success Director, I’m tasked with helping the Tinyclues CSM team do their best job possible, as well as ensure each of our clients are provided with the same quality of experience regardless of who the assigned CSM may be.

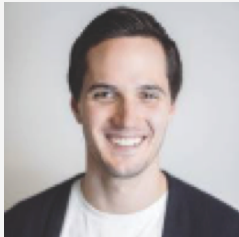
This can be challenging in the context of high-touch customer success practices and a fast-growing team, so one effective practice we follow is **sharing knowledge during our daily stand-up.** Here each CSM has the opportunity to explain the situations they’re facing and how they’re managing them, as well as ask for help and advice from other members of our team.

This morning routine has created a great sense of team spirit where rookies and experienced CSMs work together.”

“We’ve developed a full methodology to **scale customer success teams using technology**. By implementing our methodology, clients have shown to increase the CSM team’s ability to prioritize SMB clients and increase expansion and retention rates.”



Irit Eizips
CEO
CSM Practice



Quinton Ayers
Director of Customer Success
SalesRabbit

“More of a tactic, but **my team has started to pick up the phone more instead of shooting off so many emails**. I think it’s really easy to resort to sending off a bunch of emails as you work through your to-do list, but there are some conversations that merit a phone call. It’s harder to really “reach” customers through email when you need to convey an important message.

We’ve also started using a product called Loom to send videos/screen recordings over email for certain questions (e.g., if a customer asks a specific question about a specific feature, we just record a quick screen recording to email back instead of just writing out a description).”

“While I think it’s obvious that clear communication is important in customer success, **I think that accurate creation of expectation with your customers is of paramount importance**. This is particularly true when dealing with a segmented customer base.

Whether you segment by size, growth potential, pricing package or some other method, **it’s vital to your success that your customers have a clear understanding of the level of customer success that you will deliver to them**. I find that this, more than anything, helps to avoid frustration and issues down the road.”



Russell Gray
Director of Client Success
PacketSled



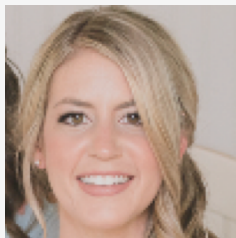
Emilia Maria D'Anzica
Founder & CEO
Customer Growth Advisors

“Companies get so caught up in their product & industry jargon. Leveraging free/lost cost products like <https://app.readable.io/text/> reminds a company to write & speak the customer’s language. **Your customers don’t care about your KPIs. They care about how your product is reducing their company challenges and helping them succeed.** Using everyday language that resonates with their needs and business has been incredibly powerful when working with my clients as they scale out their customer offerings.”

“**Believe in the work hard – play hard philosophy**, I think we forget the second part with customers. Recently had the opportunity during our user conference week to set up an offsite team building event with one of our strategic clients. I believe this not only allowed for some fun, but the outcome was an additional level of both trust and partnership!”



Naisan Modjarrad
Director, Customer Success
Apttus

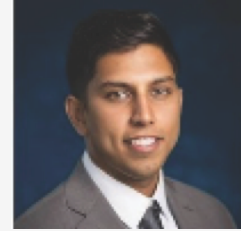


Sara Masson
Sr Customer Success Manager
Loopio

“**Our team has recently implemented a “top tip” sharing as part of our weekly team meeting**, and it’s had a huge impact. Whether it’s a new calendar tool that shows multiple time zones at once, a great email subscription platform to stay on top of industry trends impacting our customers, or a new screen capture tool that allows us to communicate with our customers more efficiently, everyone on our team is constantly stumbling upon these micro-wins.

By taking 5 minutes a week to step back and share these with the rest of the team, we’re constantly improving as a team, gaining efficiencies, and allowing every team member to contribute to the success of our team.”

“Helping will sell, selling won’t help”. The best advice I’ve received from a mentor is that **authenticity always wins**. And unless you have a GREAT relationship with your customer/prospect, I wouldn’t recommend saying “I need to hit quota, can you help me out?” Any experienced buyer can pick up on when they are being “sold”. As an alternative, genuinely wanting to help and being a valuable resource has led me to success in every role of my professional career. Give it a try, consistently, and I think you’ll be pleased with the results.



Sheik Ayube
Director
ESG (Customer Success as a Service)

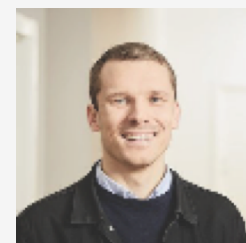


Chris Hecklinger
Sr Director of Client Success
EveryoneSocial

“Setting up regular calls (weekly, 2x/month, or monthly). It sounds elementary, but it’s really helped me build relationships quickly, stay close to clients, and keep us top-of-mind with the client. If I had to put a number on it, I’d guesstimate **the clients I have regular calls with are 50% more successful than those I don’t have standing calls with.**”

“Finding the right software tools and work processes that helps you structure your day. As a CSM you have to be able to navigate in between a lot of different tasks and assignments, which at times can be difficult.

So making sure that you **have time in your workday where you can zoom in 100% on 1st priority tasks** is important. For us at Traede, this has meant changes in regards to our service channels (phone, e-mail and chat), so that we continue to deliver timely and 1st class service but also allowing us to focus on complex tasks without having to jump in and out of these.”



Rasmus Justesen
Head of Customer Success
Traede



Vic Kasoff
Director of Customer Experience
NarrativeDx

“With so many priorities being juggled by the CSM team, time management and prioritization are key. I always try to follow a variation 5-minute rule. **If a task can be done in 5 minutes, just knock it out.** It helps me create a meaningful to-do list, manage my non-stop Inbox, and plan to provide surplus value for my clients.”

“Lucidpress is a fast-growing SaaS startup and the second product offering of Lucid Software, so the members of my team each wear several hats, myself included. Because the needs of the business evolve so quickly, customer success is uniquely responsible for keeping all of product, engineering, marketing, and sales informed of the news on the frontline. It is especially essential that product managers and developers understand clients’ industries and the pressures that make this or that an appropriate solution to the biggest problems.

It’s difficult to share our expertise with 60 different individuals, so **we started a 5-minute tip session in our weekly all-hands meeting Tuesday mornings.** The tips are typically 2-3 simple screenshots that illustrate how one persona or the other uses a particular feature that came up in conversation the previous week. We embed our description in the context of the job that the user needs to get done and share notes of what else the user would like to see.

It’s been neat to see people chat about an industry persona afterward, and some of our best process and feature improvements were kickstarted when Lucidpress team members walked up afterwards with questions.”



McKayl Bergman
Head of Customer Success
Lucid



Rachel McElwain
Head of Customer Success
tend.ly

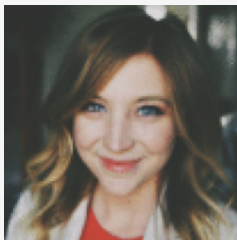
“My role involves both customer on-boarding and traditional customer success management, so **I created a workflow from the moment the customer signs their initial contract through to the renewal process** and then built out templates and documents for each step of our process so that I can quickly edit and adapt communications for each customer.”

“Something we’ve recently implemented with our CSMs is a term we’ve coined front-line empowerment. In a nutshell, it’s **empowering CSMs to take care of their clients without needing specific approval from management.**

From a leadership stance, this has been beneficial for two reasons. First, we’ve found that CSMs are getting more creative, innovative, and strategic in their approach to “customer success”. Second, our CSMs have shown a higher dedication to their customers with the added autonomy in their jobs.”



Matt Evans
Director of Customer Success
Grow



Erica Newell
Manager, Client Development
Marketware

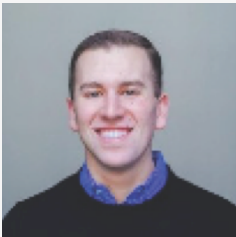
“I’ve actually **learned to better utilize LinkedIn!** Though it’s primarily thought of as a platform for sales, jobseekers, and recruiters, it can be equally as powerful for customer success professionals. My strategic use of the tool has enabled me to help build client confidence, form strong relationships, reduce churn, and even increase revenue – results that come from balancing professionalism and authenticity. While I by no means consider myself a LinkedIn guru, I have learned quite a bit through research and utilizing the features available to me in the platform.

For a full list of the best practices I’ve learned, check out my other CSM from the Trenches post [5 LinkedIn Best Practices to Build, Grow, and Improve Client Relationships.](#)”

“I’ve stopped focusing on renewals (even though my team is responsible for them). Value must be the area of focus, and renewal is a byproduct of that. **If your customers are truly finding the value and path to success they desire, the renewal will come naturally.**”



Adam Kuznia
Chief Customer Officer
DataCamp

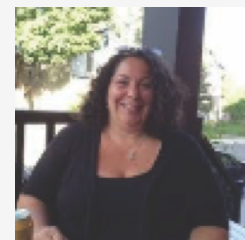


Jesse Brightman
Head of Customer Success
stensul

“Shrink variability to increase predictability. It all comes down to pattern recognition – you can look at patterns of what makes customers successful, grow, and renew, as well as what has made customers bad fits or not successful. As you test and gather more data points, you can start to distill best practices. From there, you test, get feedback, and fine tune. The more you can do this, your processes and operations become more repeatable and scalable, and ultimately allow you to accurately forecast the health of an account based on your operations.

In building CS teams, it’s important to not say, “this is Carolyn’s way vs. Kevin’s way of doing things,” or “this is how we do it for Acme Inc.” Rather, you can take full ownership and put yourself and teammates in the driver’s seat and say, “this is our proven methodology of doing things, and here’s why it will ultimately be a fruitful partnership.” **Consistency and repetitions, like many things in life, helps create mastery. It also ensures that customers get the same excellent experience no matter who they are partnering with on my team.**”

“True customer advocacy – giving everything I have to building customer success as a culture. **I do this in part by bringing back the often difficult-to-hear stories from customers** about what isn’t working for them in the hopes that advocating on their behalf translates into success for both them and for us as a company. This honest and transparent approach to managing customers has helped me prove in my newer role that I am passionate about our customers.”



Jorie Basque
Customer Relationship Manager
InGenius



Gregg Frohman
Director of Consulting
ClientSuccess

“I’m a fan of the the 5 Whys technique. This iterative questioning process ensures that I’m focusing on the root cause of a problem rather than on a symptom. **CSMs are problem solvers, but in order to solve a problem you need to make sure you truly understand the root cause.**”

About ClientSuccess

Our goal through our CSM From the Trenches: Mentors Edition series is that everyone who touches customer success – from CSMs to department leaders to company executives – takes away valuable information from a day-in-the-life of one of the most valuable positions in the company: the customer success team member.

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>.