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**STAR Awards**

2023

2023 TSIA STAR Awards  
Featured Application





HP has tailored CSM training to the individual – an approach that ensures a more consistent experience for the customer and a more satisfying one for the CSM.



5%

cost reduction for customers



2-8%

productivity gain for customers



18%

increase in NPS\*  
(over the last four quarters)



80%

decrease in customer DSAT  
(over the last four quarters)

Creating a uniform, outcomes-based experience for a global customer is easier said than done – a challenge exacerbated by the fact that HP serves its contractual customers from two distinct business units (print and personal systems) and across multiple geographic markets, each with a different process and skill set to addressing customer requirements.

HP has aligned globally around Customer Success and the LAER model, resulting in the formation of multiple transformation initiatives. One of these initiatives is focused on the development of skills and capabilities of the Customer Success Managers (CSMs). This initiative recognizes the challenge of a diverse group with a variety of backgrounds, experience, and understanding of both fundamentals and specific capabilities. Not only are we unifying the experience for customers but also the skills and capabilities of the CSMs.

This aligned global view and unified approach to improving CSM skills ensures a better customer experience. The overarching strategy of this multi-year journey is aligned to TSIA's "7 Levers for LAER Transformation" framework, and HP is innovating in its approach to training CSMs who will execute the transformation on the front lines. While many companies approach this challenge with the blunt instrument of one-size-fits-all training, HP has developed an individually tailored approach – one that ensures a more consistent experience for the customer and a more satisfying one for the CSM, all with the aim of increasing Adoption, Expansion, and Renewal (AER). This groundbreaking new program is called CSM AER UNITE.

#### WHAT WE DID

To design an effective journey for CSMs, we started with the defining the future state CSM and set aspirational benchmarks for skillsets including sales and soft skills, business management and CSM best practices, market intelligence and competition, and knowledge of HP's portfolio, processes, and tools. Working backward from that future state, we mapped out the following progression.

**Current-state assessment.** Our CSMs have quite varied tenures and career paths. Rather than diluting that diversity with a homogenized approach, HP celebrates it by analyzing gaps (prioritized by business needs) at the individual level and clarifying a consistent path to filling them. We accomplished this by arming each CSM Manager with an assessment tool that assisted them to evaluate each CSM, at the individual level, compared to the future state CSM.

\* Measurement is on a scale of 0-10. The Net Promoter score is calculated by subtracting the percentage of detractors from the percentage of promoters. Detractors are customers with a response score of 1-6. Promoters are customers with a score of 9 or 10.

To date, this assessment has been completed by more than 400 CSMs around the world.

**Personalized journey to excellence.** For each CSM level (specialist, expert, master), we implemented a two-year training program following best practices:

- Tailored by role and level: Personalized and relevant, aligned with desired assessment outcomes ranging from foundational to advanced, and with freedom for CSM to choose “elective” skills they want to develop as they move along their newly clarified career path.
- Blended learning offerings: Driving, deeper engagement through a wide array of mechanisms – all available through a single point of access. For example, HP Uni is an award-winning, mobile-based, gamified and social app designed to reinforce critical knowledge and strategic sales skills.
- Certification: Internal and industry-standard mechanisms to help CSMs demonstrate their acquisition of targeted knowledge and skills.

**Continuous learning and monitoring.** Periodically revisiting and updating the training, tracking satisfaction, and engaging regularly through a variety of communications modes.

CSM AER UNITE is administered globally, ensuring a consistent, improved experience for employees and the customers they support.

## CUSTOMER IMPACT

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Our Customer Success Transformation is driving results for our customers, of which our CSM AER UNITE program is a part. By enabling CSMs to move from an operational concern to focus on customer outcomes, we have recently helped customers: achieve leadership in sustainability, improve productivity, and reduce risk. Customer outcomes include reduced costs by 5%, improved productivity of 2-8%, reduced risk of 3%, and CO2 emission reductions of 10%.

## BUSINESS IMPACT

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CSMs are better equipped to manage renewals and we have seen an increase in NPS during renewal from a score of 57 to 77 over the last two quarters. By enabling CSMs to manage customers holistically, customer churn has decreased from over 5% to 3%.

The impact of the efforts is seen in positive effects on customer loyalty measurements:

- Over the last four quarters, our Net Promoter Score (NPS) score has improved from 49-59
- Over the last four quarters, our Customer Dissatisfaction Score (DSAT) has declined from 5% to 1%

**"The topics were perfectly structured and complete detailed to address all values for me to apply it on my daily basis with my customers."** – LATAM-based CSM

**"The course was engaging and the ability to work with peers to collaborate in the customer scenarios during the workshops worked perfectly."** – EMEA-based CSM

**"My team has shared that the training program is put together very well. It is relevant and they are able to use it right away to engage, manage and retain the customer."** – Global CSM Manager

## NEXT STEPS

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As the Customer Success Transformation continues, we will:

- Deploy a customer success platform that further enables global consistency as well predictive analytics, health scores, and workflow automation leading to better customer outcomes and improved Customer Success scale and productivity.
- Continue to formally create closed-loop feedback from Customer Success to Portfolio for ongoing solution development.
- Enhance current Customer Success Manager monetized offers.
- Continue learning and career paths for CSMs and the development of certifications. Continue to enhance our assessment tool and apply it for continued improvements.
- Align updated segmentation, coverage, and customer-engagement models to ensure maximum cross-sell, upsell and lead generation is achieved.

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