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STAR Awards

2023

2023 TSIA STAR Awards
Featured Application

Ellucian is pleased and enthusiastic to submit our nomination for the STAR Award *Innovation in Customer Success* category. Our innovative approach to Customer Success will accelerate our cloud transformation initiatives and propel our customers toward future success in the Cloud. Customer Success and Support are the cornerstones of any business, and the ability to draw from the strong customer relationships and trust built over the years to drive internal and external transformation can be a powerful lever toward value realization. This submission aims to showcase the innovative initiatives driven by Customer Success across the entire Ellucian organization.

The Opportunity

The role of Customer Success has significantly evolved over the years, with goals rapidly changing from year to year with the unintended outcome of losing its identity and strategic importance to an organization.

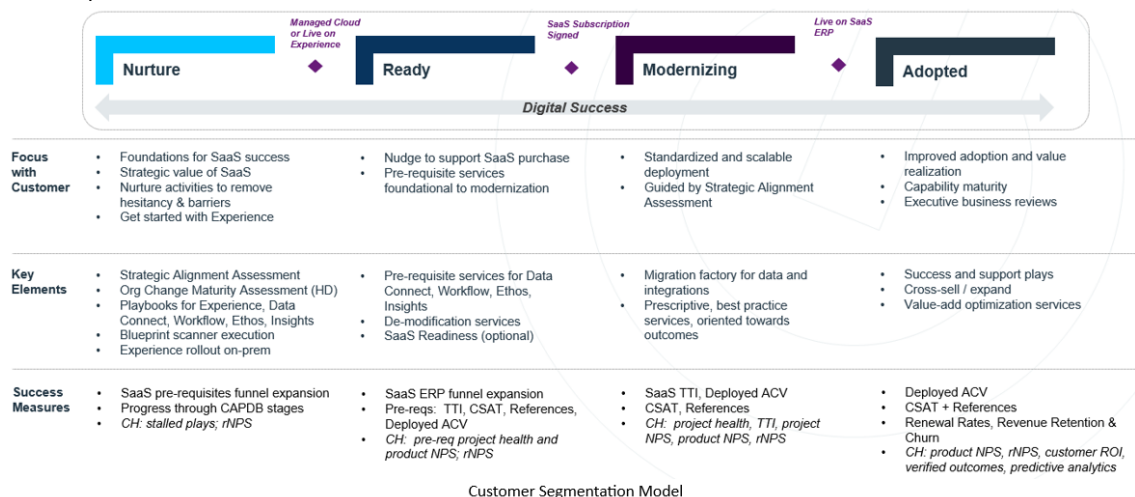
i “CS can become a “junk drawer” and the dumping ground for every sort of business task. Rather than being a high-efficiency, low-cost, adoption-and-revenue engine, it becomes to place where companies move their mess, without ever cleaning it up.”
Stephen Fulkerson, Digital Hesitation

At Ellucian, Customer Success segmentation has historically been based on various factors such as demographics, location, and revenue, with a primary focus on sales and renewals. Our diverse customer base comprises organizations using On-Premise, Managed Cloud, and SaaS solutions, and our goal is to transition all customers to SaaS. We found that our customers, while wanting to move to Cloud, were still determining how to get there and how long it would take. Waiting in uncertainty reduces the need to move, so we wanted to reduce the uncertainty. Compared to other customers, if a customer can see where they are at and have a map of how long and what would need to be done to move, we could influence customer decisions by providing them with improved experiences based on a focused journey map and an expert guide. This was an area where the Customer Success organization, given its unique qualifications, could play a pivotal role in Cloud transformation.

What We Did

Our mission is to meet customers where they are and proactively engage to advance them toward a modernized platform delivering proven practices and capabilities that advance institutional goals. We created a vision, mission, and strategic approach, with tactical actions to measure our success. We needed a baseline to start with and move forward with, so we started with a discovery analysis of our customer data, which included their size (user population), infrastructure (compatibility, security measures), technology stack (current cloud usage, integration needs, automation), and business goals (culture and business goals).

Based on the analysis, we gathered themes that helped to group customers into segments based on where we saw them on the path to cloud transformation.



As a result of this grouping model, we could quickly identify patterns and bottlenecks hindering transformation efforts and deliver value throughout their lifecycle in cloud transformation through cross-company convergence. We comprehensively reorganized our Customer Success and Support teams in conjunction with the Customer Segmentation model. This restructuring aimed to foster seamless collaboration, streamline processes, and enhance customer experience. We created specialized capabilities in Strategic Systems, Digital, ERP SaaS Success, and Escalation Management, with Customer Success facilitating and engaging customers across segments to deliver value throughout the customer lifecycles of:

- **Value Discovery**

Value messaging, Strategic Alignment Plan (SBAs), Blueprint (R&D), Ellucian Discovery Survey (Cloud), Managed Cloud Scorecard, Decision Link (Marketing), SaaS Readiness Assessment (Professional Services), Org Change Maturity Assessment (HD), CSM Engagement Planning (CSMs), Customer Portrait.

The Customer Portrait is a powerful tool used not only in this phase but all others as well. The portrait provides a detailed profile of customer needs, preferences, purchase history, goals and values, and any external and internal influences.

- **Value Delivery**

Success Services – Engagement/Digital, Support Services (KB, Community), Training & Ed Services, Advisory Services, Implementation Services, Change Management Services, SaaS factory (migration, integrations, extensibility), Capability/business process services/de-modification, Localization service/regional compliance, Other white space services (grants, thought leader, automation), Partner services.

The value delivery phase allows customers to choose services that will improve their success. It also allows Ellucian to increase profit by merging offerings designed to augment value realization and outcomes.

- **Value Optimization**

Engagement Planning, Executive Business Reviews, Training & Ed Services, Renewal motions, Strategic services – capability maturity, Tune-up services, Product Usage Telemetry.

A key value of SaaS solution is the ability to track usage and adoption across our portfolio; this allows Ellucian to highlight the value of our solutions, thereby influencing renewals. In areas where usage is lower, Ellucian can act on increasing adoption through learning and enablement.

The Impact

Through our efforts, we have garnered and improved on the following:

- **Data-driven Customer Insights** to ensure decisions are made based on data as opposed to opinion
- **Outcome-based Engagement Model** focusing on established and aligned goals to drive Cloud Transformation
- **Proactive Monitoring and Predictive Analytics** to better gauge usage and proactive enablement for overcoming challenges
- **Customer Success Playbooks** to increase standardization yet allow for differences based on our Customer Portrait

In Conclusion

Innovation in Customer Success requires, first and foremost, a customer-centric approach to all things: to meet the customer where they are and leverage the trust built through relationships coupled with data-driven insights. It requires proactive engagement as opposed to reactive approaches. It requires continuous learning and collaboration across departments.

Embracing innovative approaches and prioritizing convergence on efforts across the company are keys to success. At Ellucian, we've opened the doors to our future success using those keys.



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