Best Customer Success Practices

followed by

Customer Success **Influencers** in their Companies

customer success BOX

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Introduction

Customers are the foundation of any business, and those managing the relationships must take care to nurture and grow partnerships for long-term success. When onboarding a new customer, welcoming them warmly and instilling trust and confidence that you'll meet their goals is a fundamental step in the customer success journey.

We understand that your company is committed to and prioritizes a positive experience for all of your customers. This eBook is dedicated to understanding customer success best practices and features success stories from 15 Customer Success Influencers.

They share insights about best practices in customer success and tips you can implement to deliver an even better customer experience.

BossaBox

A tech startup with a complete suite for discovering and developing the right digital products for the business needs and if already operational, evaluates the product for new integrations and features. BossaBox have connected freelance professionals and companies since 2017, to transform the world with uniquely developed products.

They could see better alignment between the Sales and Customer Success teams about the ICP and the value and impact delivered to the customers. They're now using the same framework to qualify and impact customers throughout the entire customer journey.

They are able to achieve historic results of the following goals: MRR Expansion, Net Revenue, Churn, Logo Churn, and Net Dollar Retention.

Know how Felipe Guerra - The Senior Customer Success Manager in BossaBox implemented the best practices in the firm!

Q: Have you defined the Customer Onboarding process? What parts of the process are automated?

Felipe: "Onboarding is the stage of the customer journey where the customer is trying to discover that the product is the right solution for his pain points. The main goal is to make the customer achieve his first value the fastest way possible. After this point, the customer partially adopted the solution and is ready to use it regularly. We have automated CRM e-mail alongside the customer journey and workflows triggered by Hubspot."

Q: How do you ensure your customers reach early value?

Felipe: "Information and alignment by the sales team and high touch onboarding process."

Q: How do you impart customer training?

Felipe: "By video calls. We have a high-touch approach and adapt the use case of the products to the customers needs."

Q: What are the best practices that you employ to drive product adoption?

Felipe: "Engagement of a lot of different stakeholders, understanding of roles and responsibilities, and what are the information and/or reports needed by them."

Q: What are the best practices that you employ for your tech-touch customers and high-touch customers?

Felipe: "We only have high-touch customers. The most important thing is to have a different approach with every single stakeholder. Ex.: the way we communicate with Product Managers and Developers is different from the way we communicate with C-levels and directors. We need to have different approaches when communicating with operational, tactical, and strategic level stakeholders."

Q: What are the best practices for conducting Business reviews? How often do you do it?

Felipe: "It is the most important touchpoint of our customer journey. We do it every quarter and basically, we make a recap of the objectives from the last quarter, key learnings, blockers, benchmarks and desk research and define new objectives and goals, in a co-creative way."

Q: How soon do you start your renewal process? What best practices do you follow?

Felipe: "We keep an eye on the SPICED framework applied to the customer, so we can deliver customers' desired outcome and generate impact before the renewal date. But we have workflows at Hubspot that generates alerts and tasks to the CSM's way before the renewal."

Q: What are the key metrics and/or the KPIs that you track?

Felipe: "Time to First/full value, Impact, CSAT, NPS, Logo and Net Revenue Churn, Upsell, Cross-sell, NDR, Joint Impact Plan % completed, alongside others a little less relevant."

Q What are the different stages you consider while mapping out the customer journey?

Felipe: "Implementation, Adoption, Success, and Growth."

Q: What is your account expansion strategy?

Felipe: "We aim to generate and demonstrate impact, especially to the Approver (Decider), and send monthly reports to different stakeholders with different information. One of our key approaches is to maintain one-on-ones with the Approvers on a monthly basis, so we can develop more relationship, discuss abouts business and product goals and strategies so we can discover new opportunities, leading to CSQL's"

Q: Who owns Customer Advocacy at your place? How do you go about it?

Felipe: "Customer Success and Account Management teams. We have playbooks triggered at different stages. But we have a strong partnership with Marketing and CRM teams, so we can align the same strategy to generate cases, webinars or podcast episodes and referrals."

blue dot

BlueDot

Blue Dot develops the technology-based tax compliance platform in the arena of the employee-driven transaction for tax compliance and assurance, giving clear visibility to the meanings in the details through their services. It is serving thousands of companies worldwide. It is situated in the Netherlands, and Israel and has representation in the US.

Read the best practices followed by Blue Dot shared by Shai Rybak - The Vice President of Customer Success.

Q: Have you defined the Customer Onboarding process? What parts of the process are automated?

Shai: Yes, we did and I lead in-person automation of the client self onboarding as a part of our platform.

Q: How do you ensure your customers reach early value?

Shai: “We started by defining what value means to our clients. We then defined a clear KPI around the time to the first value. Our onboarding managers are measured on time to the first value.”

Q: What are the best practices that you employ to drive product adoption?

Shai: “We encourage clients to be self-sufficient by answering questions that can be answered in the clients’ portal as part of our product, by doing a screen share session, and by showing clients how to find information.

We track clients' usage and have automation scripts for users who abandoned the system and for clients who log in for the first time.”

Q: What are the best practices for conducting Business reviews? How often do you do it?

Shai: “We run quarterly business reviews. All Business Reviews are done based on live data in the clients' portal.”

Q:How soon do you start your renewal process? What best practices do you follow?

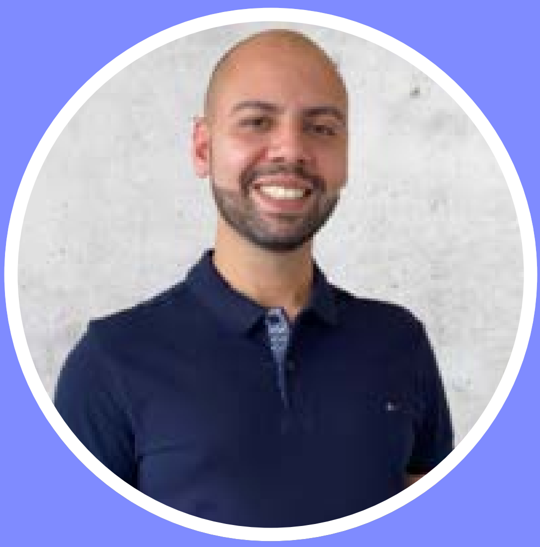
Shai: “It is 60 days before renewal. We check the client's health as well as usage to make sure before 6 months of the time of renewal for any risks that may pose.”

Q: What are the different stages you consider while mapping out the customer journey?

Shai: “Kickoff, self onboarding, setup review by Blue dot, first value, ongoing value, expansion, renewal.”

Q: What is your account expansion strategy?

Shai: “The CSMs are the CEOs of their own portfolio. They are the main point of contact for the client and they achieve expansions through advisory.”



CX Project

CX Project (www.cxproject.co) is a professional education company focused on developing a customer centric mindset through reflections and practical directions, so that people can lead transformations in their business helping their customers to achieve their goals through incredible experiences. This platform elevates your knowledge of customer experience and customer success to another level.

Their management is based on long-term strategies. Any indicator analyzed in isolation will not reflect the vision necessary for you to correctly interpret the health of your business or operation.

In numbers, they managed to reduce from 8% to 2% of monthly churn in a SaaS company and segmenting this base in High, Low and Tech-touch. They achieved 0% churn of strategic customers (high-touch) in a period of 1 year.

Marcus Dias - The Founder and Mentor at CX Project shares the best practices incorporated in their firm. Learn more about it!

Q: Have you defined the Customer Onboarding process? What parts of the process are automated?

Marcus: “I have already developed some onboarding processes. The automation of the process depends on the maturity level of the operation. Doing what doesn't scale at the beginning is learning in practice with the needs and preferences of customers, it's the best way to automate some parts of the processes.”

Q: How do you ensure your customers reach early value?

Marcus: “The fundamental point is to map the customer's initial objective and ensure that all teams involved in the journey of critical success, are aligned and engaged to help the customer to achieve their goal.”

Q: How do you impart customer training?

Marcus: “Customer training starts within the onboarding process. To increase the perception of value, we focus on empowering you on the critical path of success so that you reach your initial goal. After this step, we begin a more complete training journey on our products and services and place the customer in a process of nurturing knowledge.”

Q: What are the best practices that you employ to drive product adoption?

Marcus: “Depends on the context of each client and each operation. However, I have had good results promoting webinars, customer interactions, events, and success stories.”

Q: What are the best practices that you employ for your tech-touch customers and high-touch customers?

Marcus: “With customer success in mind, the best practice is to identify and help the customer achieve their goals. Ranking helps with prioritization, however, all customers are important. With this positioning, it is natural that high-touch customers have a closer follow-up compared to tech-touch customers, but I seek to create strategies so that all customers receive our best!”

Q: What are the best practices for conducting Business reviews? How

often do you do it?

Marcus: “With customer success in mind, the best practice is to identify and help the customer achieve their goals. On a prioritization scale, it is natural that high-touch customers have a closer follow-up compared to tech-touch customers, but I try to create strategies so that all customers receive our best!”

Q: How soon do you start your renewal process? What best practices do you follow?

Marcus: “The best renewal process is to help your clients achieve their goals continuously through incredible experiences. The renovation will be the consequence of good work.”

Q: What are the key metrics and/or the KPIs that you track?

Marcus: “NPS, CSAT, CES, Churn rate, LTV, Renewal, Tickets Resolution Rate.”

Q What are the different stages you consider while mapping out the customer journey?

Marcus: “From the first stage of prospecting until renewal or Churn.”

Q: What is your account expansion strategy?

Marcus: “I develop the expansion strategy based on the clients' goals.”

Q: Who owns Customer Advocacy at your place? How do you go about it?

Marcus: “Employees selected through the customer-centric ambassador program.”

Electric

Electric AI: An IT unicorn company based in New York City. They strive to streamline and make the IT world simple for their clients.

With one-of-a-kind technology, Electric has offered lightning-fast IT support, real-time issue resolution, security at the network and app levels, and other management solutions whether the firms are on-site, hybrid, or remote since 2016.

Electric with $300M+ revenue has shared the glimpse on best practices followed by them.

Jared Orr - The Senior Customer Success Manager at Electric shares some insights on the same. Continue to read!

Q: Have you defined the Customer Onboarding process? What parts of the process are automated?

Jared: “The onboarding process is handled by the implementation team. Customer Success Managers are not involved until the client is fully onboarded. No automation is involved.”

Q: How do you ensure your customers reach early value?

Jared: “Once the client is handed off from the implementation team to the CSM, we ensure the client has all of their apps integrated with our IT software and that they can fully onboard and off-board users with little to no issues.”

Q: How do you impart customer training?

Jared: “I ensure that we have a weekly/bi-weekly/monthly cadence set up so we have consistent contact. Each call, I come with an agenda of items I feel the client needs to be aware of to get maximum value from our services.”

Q: What are the best practices that you employ to drive product adoption?

Jared: “Detailed account reviews and consistent product roadmap updates.”

Q: What are the best practices for conducting Business reviews? How often do you do it?

Jared: “Have an agenda for every review. The cadence depends on the needs at the lifecycle of the client.”

Q: How soon do you start your renewal process? What best practices do you follow?

Jared: “Notify the client 90 days ahead of time. Start forming the new contract or the offboarding process 30 days ahead of the renewal date.”

Q: What are the different stages you consider while mapping out the customer journey?

Jared: “Implementation to CSM handoff, time to value, renewal.”

Q: What is your account expansion strategy?

Jared: “We have an account management team that handles cross-sells and up-sells.”

Hysolate

The platform with secured design architecture enables the organization to split the endpoint into two isolated virtual workspaces for the enterprises to avail IT and Security management with ease of mind while having it all managed in the cloud.

Their practice got them to 95% + NRR. Guy Galon - The Vice President of Customer Success shares glimpses of the practices followed in Hysolate.

Q: Have you defined the Customer Onboarding process? What parts of the process are automated?

Guy: “Customer onboarding is defined in manual playbooks. The complexity of the product does not allow automation to be cost-effective at this stage.”

Q: How do you ensure your customers reach early value?

Guy: “By prioritizing a subset of the use case that has the most impact on the customer and plan to deliver it as early as possible.”

Q: How do you impart customer training?

Guy: “A few clips are helping the customers to use the management console. We provide ad-hoc training to end-users and admins as part of the onboarding.”

Q: What are the best practices that you employ to drive product adoption?

Guy: “Provide bi-weekly product updates and promote features that were asked for, by our customers.”

Q: What are the best practices that you employ for your tech-touch customers and high-touch customers?

Guy: “We are mainly high touch. We created an internal dashboard for CSM to monitor usage with certain alerts. We have monthly meetings with customers to track open issues and requests. We perform QBRs and run a customer satisfaction survey annually.”

Q: What are the best practices for conducting Business reviews? How often do you do it?

Guy: “We perform a minimum of 2 QBRs annually and with certain customers 3 times a year. We track a few usage trends and spend time providing updates about our roadmap and discussing with the customer priorities and challenges.”

Q: How soon do you start your renewal process? What best practices do you follow?

Guy: “We started 4-5 months before. We monitor customer health and the likelihood of renewal from the onboarding stage.”

Q: What are the key metrics and/or the KPIs that you track?

Guy: “NRR, Logo retention, Product usage.”

Q: What are the different stages you consider while mapping out the customer journey?

Guy: “Onboarding, adoption (we have 2 tiers of adoption), expansion, renewal, advocacy”

Q: What is your account expansion strategy?

Guy: “Land and expand! Start with a small subset of users and once the value is proved. increase the number of registered users.”

Q: Who owns Customer Advocacy at your place? How do you go about it?

Guy: “Mixed responsibility between marketing and CS.”

Imagem

The advanced mapping and analytics platform solves the business problems with geographic information systems by making the business see what others can’t using GIS and Location Intelligence, supporting socio-environmental risk analysis and financial decisions. They are the official distributors of the best Geographic Information System and Location Intelligence in the world, ArcGIS from the American company Esri.

The Customer Success Department has existed at Imagem for 3 years. Before its implementation, the annual churn rate was 45% and NPS 72. Currently, the annual churn rate corresponds to 14% and NPS 87, in addition to new business having been generated in base customers, in the order of R$ 7 million.

Lilian Fernanda Castilho de Almeida Oliveira - The Head of Customer Success shares the practices followed in Imagem. Read on to understand the practices better!

Q: Have you defined the Customer Onboarding process? What parts of the process are automated?

Lilian: “We have two types of products: SaaS and on-premise. For both, we have the self-service option, where the customer receives a Guided Onboarding (soon after acquiring the license) that guides him through the entire journey of first steps on our platform until the product is ready to be used. For High Touch accounts, we made the face-to-face meeting with the client to present the planning still in the Onboarding phase.”

Q: How do you ensure your customers reach early value?

Lilian: “During the sales process, the reason that makes the customer buy ArcGIS (System from Esri that we represent here in Brazil) is mapped. After closing the contract, within the Onboarding phase, the client receives guidance on how to use ArcGIS to solve the problem that made him buy this license. We also track some product adoption indicators.”

Q: How do you impart customer training?

Lilian: “We have several tutorial videos, some focused on the product, others focused on the business that the customer can use autonomously. Additionally, every month we hold online labs to share best practices, in addition to delivering a technical newsletter with articles and tutorials on how to use the platform. If our client needs something customized, we also offer customized training.”

Q: What are the best practices that you employ to drive product adoption?

Lilian: “We believe that the best way is to help the customer solve the problem that made him buy ArcGIS (for this reason, this issue is mapped from the sales process) and this helps him to realize the added benefit of solving it through our platform, whether in cost reduction, increased operational efficiency, faster decisions, or increased productivity, for example.”

Q: What are the best practices that you employ for your tech-touch customers and high-touch customers?

Lilian: “When we look at Tech Touch customers, the most assertive way has been to map personas: for end-users of the platform (that is, those who use ArcGIS) is to provide tutorials on how to use ArcGIS in Portuguese and with examples applied to their business. For Contract Managers, it has been to share successful cases of competitors that use our Platform with the return perceived by them.

For customers with a High Touch profile, our team develops the Success Plan, which aims to identify the business objective for using ArcGIS and present the steps that the customer must go through when using ArcGIS.”

Q: What are the best practices for conducting Business reviews? How often do you do it?

Lilian: “It depends on the customer profile. For Tech Touch customers, the review is every quarter, for High Touch customers, the review takes place monthly.”

Q: How soon do you start your renewal process? What best practices do you follow?

Lilian: “Our product has the characteristic of having an annual maturity. Given this, for Government customers, we usually offer an extended renewal for 3 years instead of annually, for private companies, it can occur between 6 months and 3 months before the contract expires. We are currently reviewing this system to favor early renewal with added value to the Maintenance Agreement.”

Q: What are the key metrics and/or the KPIs that you track?

Lilian: “We track ArcGIS consumption metrics (when the last login was performed, the last data update, if the credit balance is being consumed and if all licenses contracted by the customer are being used), relationship metrics with the Imagem (opening of Technical Support calls, engagement with Customer Success, upsell and cross-sell) and satisfaction (NPS and CSAT).”

Q What are the different stages you consider while mapping out the customer journey?

Lilian: “Our journey consists of four major blocks: 1. Landing (all steps before purchase: Purchase, Qualification, and Trading Journey) 2. Onboarding (download, installation, activation, and initial configurations). 3. Ongoing (adoption and expansion) 4. Loyalty and Renewal (promoting client and maintenance contract renewal)."

Q: What is your account expansion strategy?

Lilian: "For High Touch accounts, we identified the possibilities for using ArcGIS that the client does not use, either in another process and/or in new areas, then an OKR is defined that will direct the team's actions in favor of expansion.

For Tech Touch accounts, the process is more digital, it consists of identifying the main needs for each industry and, in the tutorials for using the platform, we present new analyzes that will only be possible to perform in the event of a subscription upgrade, for example."

Q: Who owns Customer Advocacy at your place? How do you go about it?

Lilian: "At Imagem, our Customer Success team is responsible for Customer Advocacy. Every client has a focal point on our team. When the CSM receives some feedback or anticipates a potential problem for the customer, it conducts the solution process with the areas involved, if necessary, involving the Process Quality department for a root cause investigation, as well as process improvement, all this process is monitored by the Customer Success leadership and the mapped cases are presented to the Board monthly.

Since last year, we have structured a Strategic Customer Experience Project intending to expand our customer-centric vision and unify the customer touchpoints that receive feedback on the product or the Image experience."

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Manual do Customer Success

Manual Do Customer Success

Since 2019, Manual Do Customer Success is in operation and aims to boost companies from all over Brazil in Customer Success strategies. Elevating the careers of customer success managers in growing the companies to implement the best customer success practices and strategies in action!

Hiram Damin - Head of Customer Success at Manual Do Customer Success shares the best practices they have set up in their firm.

Q: Have you defined the Customer Onboarding process? What parts of the process are automated?

Hiram: “I define the Customer Onboarding process by tier. With Low Touch customers it is possible to work with almost all the processes automated including a guide on the software features. When we are talking about Mid or High Touch customers it is important for a CS Onboarding to do touchpoints and receive feedback during the process to improve the customer desired outcome.”

Q: How do you ensure your customers reach early value?

Hiram: “The Keyword is metology. Each step in the onboarding needs to go to the next point and give quick wins. Besides this, it is important to have a deadline and a delivery faster and with high quality.”

Q: How do you impart customer training?

Hiram: “We impart customer training with good software content and an excellent enablement methodology.”

Q: What are the best practices that you employ to drive product adoption?

Hiram: “The software needs an excellent UX (user experience). Starting with the design project until the Customer Success Methodology, everything it's an addition to the product adoption.”

Q: What are the best practices that you employ for your tech-touch customers and high-touch customers?

Hiram: “In both cases, it’s very important to understand how the customer journey works and how many touchpoints will need to work. “

Q: What are the best practices for conducting Business reviews? How often do you do it?

Hiram: “Study your customer and what points you need to address and bring what you have advanced on the points listed in the previous Business Review. Do it every three months.”

Q: How soon do you start your renewal process? What best practices do you follow?

Hiram: “Start three or two months before the renewal date.”

Q: What are the key metrics and/or the KPIs that you track?

Hiram: “KPIs is also known as a key performance indicator, is a statistic that, by their value, gives a measure and a way for the companies. I track NPS, CSAT, LTV, CAC”

Q What are the different stages you consider while mapping out the customer journey?

Hiram: “FUP post-sales, Onboarding, Ongoing, and Renewal.”

Q: What is your account expansion strategy?

Hiram: “Take an overview of the customer base and study opportunities based on the Customer Journey and the MRR.”

Q: Who owns Customer Advocacy at your place? How do you go about it?

Hiram: “The responsible for Customer Advocacy is the Customer Success Manager.”

MARKETSOURCE

An Allegis Group Company

Market Source Inc

At MarketSource, an Allegis Group company, believes in better sales and customer success begin with better relationships. Their proven alternative to traditional outsourced sales is led by a proprietary process that helps businesses thrive by fostering deeper connections between people and brands.

They help generate over $7B in revenue for their customers.

The tech and purpose-enabled platform that delivers measurable improvements in the outcomes for B2B and retail environments by designing and operationalizing customer experience and sales solutions.

Read what Jeff Heckler - The Director of Customer Success in Market Source Inc has to say about the best practices followed in their firm.

Q: Have you defined the Customer Onboarding process? What parts of the process are automated?

Jeff: "The onboarding process contains all touchpoints, data, insights, use cases, personas that dovetail the buyer(s), the consumers, the solutions, and the targeted value-based outcomes. Processes that possess standards, instill accountability, and impart operational excellence at scale are targets for automation."

Q: How do you ensure your customers reach early value?

Jeff: "The joint Success Plan designed by, with, and for the customer contains metric-based outcomes, results, and KPIs that define the Time to First Value, Moments of Truth, and Moment to Value milestones and deliverables."

Q: How do you impart customer training?

Jeff: "At Customer Success by MarketSource, we use a tailored hybrid approach of digital, tangible, and human-led education, instruction, engagement, and training."

Q: What are the best practices that you employ to drive product adoption?

Jeff: "Mapping multiple levels of use cases across user personas (product consumers) drives the most organic user adoption."

Q: What are the best practices that you employ for your tech-touch customers and high-touch customers?

Jeff: "Customer Segmentation. Without a doubt, the first, most effective, and most important step is to segment your customers along with characteristics that build cohesive, data-driven, actionable cohorts."

Q: What are the best practices for conducting Business reviews? How often do you do it?

Jeff: "QBRs/EBRs are largely defined by the customer's preference. Most often, we drive these Partnership-Value-Success Plan reviews focused solely on driving value for our customers. We lead with metrics, KPIs, and milestones that matter to our customer and their business."

Q: How soon do you start your renewal process? What best practices do you follow?

Jeff: “Every conversation is a renewal conversation. The renewal is not an event. It is a by-product of constantly and consistently driving value with and for your customer.”

Q: What are the key metrics and/or the KPIs that you track?

Jeff: “They vary and are defined by our individual customers' goals, targeted outcomes, and business metrics.”

Q What are the different stages you consider while mapping out the customer journey?

Jeff: “Sales, Sales Handoff, Onboarding, Adoption, Retention, Expansion, Advocacy (A.R.E.A. by Customer Success by MarketSource).”

Q: What is your account expansion strategy?

Jeff: “Organic expansion via value realization.”

Q: Who owns Customer Advocacy at your place? How do you go about it?

Jeff: “We begin formalizing the customer advocacy partnership with our customers during the sales cycle.”

moengage

MoEngage

The customer engagement platform grows user-centric brands and supports digital engagement adding to give out superior customer experience by analyzing customer behavior. Let's the customer's segmentation at the micro-level and engage them effectively with personalized experiences, one to one.

MoEngage founded in 2014 with a headquarters in San Francisco. As a ballpark figure, It has achieved around 97% NRR.

Learn more on how MoEngage could do this with the best practices incorporated for customer success by Ankit Agarwal - The Lead in Customer Success.

Q: Have you defined the Customer Onboarding process? What parts of the process are automated?

Ankit: “The customer Onboarding Process at MoEngage is well designed. We have partially automated Sales-CS handoffs.”

Q: How do you ensure your customers reach early value?

Ankit: “We work closely with our customers during the onboarding phase. We have specialized onboarding managers who are also technical. They liaise with customers on both the campaign creation and integration process.”

Q: How do you impart customer training?

Ankit: “We generally do this in three rounds over the Virtual meetings.”

Q: What are the best practices that you employ to drive product adoption?

Ankit: “We keep a tab on product and module usage by our customers. During our cadence calls with customers, we try to brainstorm the use-cases they can achieve. Also during the EBRs, we strategically discuss the bottlenecks and how they can best get the maximum ROI from MoEngage.”

Q: What are the best practices that you employ for your tech-touch customers and high-touch customers?

Ankit: “We mostly have high-touch customers. For them, Doing EBRs and QBRs are sufficient. We make sure that we do one to many stakeholder mapping in the organization as people may leave the organization and that may lead to another risk.”

Q: What are the best practices for conducting Business reviews? How often do you do it?

Ankit: “We usually conduct business reviews quarters except for the lighthouse customers where we do Monthly business reviews. The best practices include:

1. Covering what we achieved so far
2. Goals for next quarter/month
3. Best Practices
4. Under Utilised channels
5. Area for improvement”

Q: How soon do you start your renewal process? What best practices do you follow?

Ankit: “This depends on the customer. For large organizations, this is done 6 months in advance.”

Q: What are the key metrics and/or the KPIs that you track?

Ankit: “Logo Churn, Revenue Churn, MRR, Upsell, NPS, and CSAT.”

Q What are the different stages you consider while mapping out the customer journey?

Ankit: “Kick start, Implementation, Launched, Engaged, At Risk. Churn.”

Q: Who owns Customer Advocacy at your place? How do you go about it?

Ankit: “We have a different team for Customer Advocacy.”

Navex

The NAVEX One Platform for governance offers a unified view of risk across your business, giving the power to gain organizational insight, increase operational efficiencies, and make informed decisions with confidence . NAVEX is the recognized leader in risk and compliance management software and services.

They are a global company with remote employees and offices throughout the United States, London, and Sweden headquarters located in Lake Oswego, Oregon. After implementing NAVEX's customer-facing journey (Journey to Success) to a sample group, they had a 10% favorable churn rate compared to a peer group that did not receive messaging. Additionally, the pre-renewal outreach reminded customers of their ability to leverage a specific option included in their annual subscription. From 2019 to 2020, usage increased by 1,900%; from 2020 to 2021, they saw a 150% increase.

Angie DeLaRosa – Associate Director, Customer Success at NAVEX shares her insights on the best practices followed.

Q: Have you defined the Customer Onboarding process? What parts of the process are automated?

Angie: “I define Customer Onboarding in two stages: Implementation and Training. At NAVEX, we work closely with all customers during the Implementation stage. During the engagement, our primary focus is to work with customers to configure the product to suit their needs. We also begin sharing training resources with the customer to assist with change management to introduce our products to their company. When customers complete iImplementation, they officially enter the Training Phase, and our Customer Success automation begins. Our immediate goal is to reinforce the knowledge they obtained during iImplementation and continue adding to their foundation to drive further adoption. Our automated Post-Implementation Welcome Series spans the next 60 days. Our messaging covers the next steps and best practices based on where they "should" be in the lifecycle and takes previous email engagement into consideration.”

Q: How do you ensure your customers reach early value?

Angie: “One method to ensure our customers receive value early on, is to target the Failure-to-Launch risk. There are many reasons a customer might fit this criterion and it helps to map out those reasons. This process helped us to better understand our customers and also enabled us to proactively share best practices to launch their product. We send targeted messaging based on where customers 'should' be in the lifecycle to maintain status quo and avoid adoption risks.”

Q: How do you impart customer training?

Angie: “At NAVEX, we offer real people when customers need them, and self-help resources when they want it. On the tech-touch side of Customer Success, we ensure all automated messaging includes details about how to obtain support. Additionally, our emails include clickthrough links driving customers to their training portal.”

Q: What are the best practices that you employ to drive product adoption?

Angie: “Adoption is not just a stage of the Customer Lifecycle. I believe product adoption begins the moment customers have access to the product. To successfully drive product adoption, we align Customer Success messaging into four categories across the lifecycle:

1. Build a Foundation - Set the customer up for success.

2. Value Enablement - Enable the customer with strategies to show value.

3. Value Reinforcement - Prove ROI to the customer.

4. Ongoing Partnership - Provide solutions and ongoing support at all times, not just before renewal."

Q: What are the best practices that you employ for your tech-touch customers and high-touch customers?

Angie: "Journey Mapping is a key topic in the Customer Success industry. At NAVEX, we took it further than internal journey mapping and created a customer-facing journey -; the 'Journey to Success'. The Journey to Success offers a detailed view of their journey with our products and a comprehensive workbook with step-by-step instructions. We blend how-to content with strategic exercises, and this can also be a tool for new administrators to be successful."

Q: What are the best practices for conducting Business reviews? How often do you do it?

Angie: "This is not a function we have rolled out for our tech-touch customers. However, our dedicated CSMs conduct these on a quarterly or annual basis, depending on the customer segment."

Q: How soon do you start your renewal process? What best practices do you follow?

Angie: "We have a specialized Renewals Account Manager Team (RAM); some roles are reactive to churn, and others are proactive. Our proactive RAMs connect with customers well before renewal. To assist RAMs with their efforts, customers across all segments receive proactive outreach well in advance of renewal. The intention is to nurture customers and continue helping with value realization through continued product adoption efforts.

Q: What are the key metrics and/or the KPIs that you track?

Angie: "The Lagging Indicators are: Net

Retention and Churn Percentage. The Leading Indicators are: Campaign Engagement, number of #touchpoints/contact, activity by type, campaign success, number of support cases, number of new projects, net promoter score (NPS), customer satisfaction (CSAT) , survey response rate, time to close issues, feature/service usage, .. and several more"

Q What are the different stages you consider while mapping out the customer journey?

Angie: "The high-level lifecycle stages are, pre-sales, sales, pre-onboarding, onboarding, adoption, retention and expansion. Then we go into many sublayers for a wholistic view, these include: stage owner, sub-stages, stage actions, adoption stages, and customer facing milestones."

Q: What is your account expansion strategy?

Angie: "Our Customer Success strategy is based on the well-known Customer Success Formula (developed by Nick Mehta): Customer success equals customer experience plus customer outcomes (CS = CX + CO). We focus on creating the customer's desired experience and helping them achieve their desired outcomes. This allows us to establish happy, successful customers who trust in our customer success team and NAVEX when offering consultative advice for improving their ethics, risk, and compliance program. A happy customer who is successfully using our product is more likely to buy more and adopt more of our solutions in the future, especially from a team they trust."

Q: Who owns Customer Advocacy at your place? How do you go about it?

Angie: "We have a Customer Advocacy team reporting in through marketing. However, implementation, customer success and other departments are closely aligned with this team. On the customer success team, one of our advocacy strategies includes a range of automated processes and targets NPS promoters and passives. Following a contact who submits an NPS score of 7-10. Depending on the segment, we either automate outreach to the customer or notify a CSM about the score submission. We choose to include passives in this process as it allows us an opportunity to move an on-the-fence customer in the right direction."

Nvoip

They are a communication platform focused on voip, chat and API services. Their objective is to make communication easier and less bureaucratic for Brazilians, focusing on excellent service and a simple, unreliable product. They work with the pay as you go format! Currently having customers in all Brazilian states, in addition to 20 other countries! The company is located in Juiz de Fora/MG. They recently acquired mais.im - a startup working on communication management.

They grew 250%/year and have a very low monthly churn, even with the non-fidelity format.

Learn more from the practices followed in Nvoip from Guilherme Faria - The Chief Customer Success Officer.

Q: Have you defined the Customer Onboarding process? What parts of the process are automated?

Guilherme: “Yes. Here in Nvoip, we have that process defined. We have some steps that are automated. The first thing that is automated is an overview of our system. When we do that overview, it consumes less time from our consultant when onboarding. We have some forms that measure customer engagement and they are sent automatically.

Here we have something like 30 new customers/day on the onboarding team. The division is automatic too.”

Q: How do you ensure your customers reach early value?

Guilherme: “Our product has no loyalty and is self-service. We were able to metricify whether the client has achieved success for their lifetime in the company. After we implemented the onboarding team, we reduced churn and delinquency in the initial months.”

Q: How do you impart customer training?

Guilherme: “The training process is done automatically, by a digital onboarding tool. If the customer still wants training on the product, we do it through phone calls or google meet.”

Q: What are the best practices that you employ to drive product adoption?

Guilherme: “The most basic comes from the commercial team, where we can understand the real needs of the customer. From this purchase diagnosis, we map out the important stages for adoption! When should we propose an upsell or a cross-sell. In addition to nurturing the customer, we use rich content from the marketing team.”

Q: What are the best practices that you employ for your tech-touch customers and high-touch customers?

Guilherme: “Tech touch - We let the customer call us when necessary.

High touch - We keep close to them in all evolutions of product use.”

Q: What are the best practices for conducting Business reviews? How often do you do it?

Guilherme: “Here at Nvoip, the commercial team works directly with the cs team. Exchanges, A/B testing, and business review are done monthly.”

Q: How soon do you start your renewal process? What best practices do you follow?

Guilherme: “We do not have a renewal program. The ongoing team looks for the client to follow their evolution.”

Q: What are the key metrics and/or the KPIs that you track?

Guilherme: “Chats attended, calls made, answered calls, CSAT, team size, response time, numbers of realized, onboarding, churn, MRR, ARR, cross-sell, up-sell, down-sell.”

Q: What is your account expansion strategy?

Guilherme: “The main strategy is the mapping of the customer cycle on our platform, and the delivery of new products based on the customer's profile.”

Namogoo

The digital journey continuity platform for the eCommerce brand perfects the journey of the customers through behavioral analytics, thus making the shopping experience unstoppable while elevating higher revenue for the businesses.

Namogoo is operating from Boston, New York, and London with its headquarters located in Israel.

With their practices, they were able to increase advocacy opportunities and could drive the churn rate to 7% lower than it was earlier.

Continue to understand the best practices followed by the Vice President of Customer Success - Maor Ben Ishay in Namogoo.

Q: Have you defined the Customer Onboarding process? What parts of the process are automated?

Maor: “Yes. Welcome email, KO template, user creation, and access granted.”

Q: How do you ensure your customers reach early value?

Maor: “Dedicated onboarding manager and a clear map of deliverables on the way to value attainment with Namogoo's product as we know from successful clients.”

Q: How do you impart customer training?

Maor: “CSMs are in charge of the enablement session, showing how to use the product from a stance of functionality towards value rather than feature showcasing. i.e it could very much be the training that will be completed having the customer know exactly how to operate the product to their needs yet not being aware of all of its features.”

Q: What are the best practices that you employ to drive product adoption?

Maor:“Client goals mapping, automated reach-outs upon the first login (inviting a dedicated walkthrough session with a CSM), periodical reporting via email enticing further drill down in the platform”

Q: What are the best practices that you employ for your tech-touch customers and high-touch customers?

Maor:“The same for both. Any tech touch playbook will only benefit high touch customers. The difference lies in what happens after the playbook and with a high touch that almost always leads to a CSM action whereas low touch would generate a more direct approach to the value we wish to deliver.”

Q: What are the best practices for conducting Business reviews? How often do you do it?

Maor:“A question of need, relationship, and focus - for strategic accounts - quarterly. For others anywhere between once to twice a year. The point of the QBR is to reflect progress and align plans and actions. The more attention required with the account and the higher the pace of the deliverables expected, the more often it makes sense to hold it.”

Q: How soon do you start your renewal process? What best practices do you follow?

Maor:“Six months before with a closer value mapping and quantifying endeavors three months before. The majority of our clients are very large enterprises which require making sure value is perceived for several different personas.”

Q: What are the key metrics and/or the KPIs that you track?

Maor:“NRR, retention rate, relationships, upsell indications.”

Q: What are the different stages you consider while mapping out the customer journey?

Maor:“Time to value during the onboarding as a very critical one, experience through the adoption and expansion phases, and ease of renewal when the time comes.”

Q: What is your account expansion strategy?

Maor:“Quick time to initial value, understanding clients' deepest goals (professional and personal), partnering with them to meet that, this, in turn, gives birth to expansion opportunities that close almost effortlessly.”

Q: Who owns Customer Advocacy at your place? How do you go about it?

Maor:“CS with the facilitation of marketing. CS identifies and builds the business case with potentially advocating clients (gauged in NPS, value, and relationship scores) and marketing carries out the creation and distribution of the case study/etc.”

customer success BOX

proton.ai

Proton

An AI-powered sales platform gives insights on sales opportunities, suggesting product recommendations that best suit the customer preferences for the distributors by making sales effective with seamless integration, delivering fast early value while aiding in measurable results.

After implementing the CS best practices, Proton.ai saw direct revenue growth (110%+ NRR) through more strategic conversations. Additionally, there have been efficiency gains by leveraging templates, better decisions driven by metrics, and improved brand image of the CS team internally.

Learn what Emily Garza - The Vice President of Customer Success has to say about the practices they follow in Proton.ai.

Q: Have you defined the Customer Onboarding process? What parts of the process are automated?

Emily: “Earlier this year, we spent time outlining each step of our onboarding process. In a startup, it is easy to jump in and ‘do’, but in order to scale, we needed to understand each step, define who owned it, and begin to see where things could be improved for the customer experience. Today, we look at our onboarding process with a dual view - technical integration and training/ adoption. While working in a startup, I think it is important to review this every six months, to ensure it reflects the current state.

We are working on automating data visibility during the internal handoff process (allowing time to be spent talking through context rather than filling out forms). Additionally, we are building templates for key milestones, to better automate alerts and tracking for teams who own a part of the onboarding process.”

Q: How do you ensure your customers reach early value?

Emily: “During the sales cycle, our AEs ask about success criteria. CS then confirms this (and digs in deeper if needed) during the kickoff call once the contract is signed. Sometimes customers don't know how to measure success on your tool. When this happens, it is an opportunity for CS to become a guide, sharing metrics that other similar customers evaluate.

Once we know what customers care about, we customize our training for their team with this focus. We are partnering with our Product organization to outline first value moments, where we can provide hands-on training as well as in-app guidance to help users become successful quickly. Post-launch, we share updates with the status of the milestone, partnering with the customer to adjust the course as needed.”

Q: How do you impart customer training?

Emily: “Our current customer training is primarily focused on onboarding new users. As a preparation for that, we like to shadow our end users to understand workflow and terminology, to best present our solution, and minimize the friction of change.

Knowing that having support for ongoing training is important for some customers, we are developing service packages that provide different enablement options based on how customers want to learn. This includes alternatives like onsite trainer-led sessions, drop-in office hours, webinars, help center, and in-app messaging."

Q: What are the best practices that you employ to drive product adoption?

Emily: "There are two ways we approach product adoption:

1. Understanding success criteria upfront - By being able to understand what the customer is driving towards, we can craft a plan to accomplish this. Having a reference-able plan and end goal, allows us to have accountability discussions if things go off track.

2. We like to partner with the customer leadership team to set usage expectations before launch. We've found that it is better to jump head-first into a new tool rather than ramp up - this speeds up time to first value. Additionally, when we have leadership buy-in for the tool and launch plan, it starts to become 'their technology' rather than something an outside vendor is pushing. "

Q: What are the best practices that you employ for your tech-touch customers and high-touch customers?

Emily: "Gathering success criteria upfront! Understanding the customer's use case and how they measure success drives your ongoing activities, including the metrics you review and where you focus training.

For low touch customers, this may mean bucketing accounts by similar attributes, to put them through a program created for those goals. In high touch accounts, continuing to develop relationships deep and wide is critical to gathering information and staying current on company changes."

Q: What are the best practices for conducting Business reviews? How often do you do it?

Emily: "When we build out business reviews, we aim to:

1. Spend more time on the future state than recap.

2. Prepare the agenda with your customer contact (Get their buy in on topics to cover)

3. Prepare thoughtful questions (Your company should not be talking more than 50% of the meeting time)

4. Ask for who you want in the room - don't rely on the customer to forward the invite.

5. Be clear on action items and who owns each next step.

Business reviews should be held when it makes sense for both sides - when there is a big initiative to review, value opportunities to highlight, or new relationships to cement."

Q: What are the key metrics and/or the KPIs that you track?

Emily: "1. Customer ROI

2. Growth: Net revenue retention, the pipeline of opportunities.

3. Implementation: Timeline to go live

4. Support tickets: time to first response, time to resolution, reopened tickets."

Q: What is your account expansion strategy?

Emily: "We like to set expectations early on in the life of a customer. A salesperson will ask about their entire organization opportunity (even if that isn't in the phase one deployment). During our kickoff call with CS, we will quantify success criteria and outline how that will unlock phase two deployments. Oftentimes, you have to earn your way to that discussion - proving the product works as sold and meet or exceed those original expectations.

As a customer goes live, we track their metrics and impact, ensuring they are aware of the results. Once we've hit the agreed-upon criteria, we introduce the expansion discussion."

Q: Who owns Customer Advocacy at your place? How do you go about it?

Emily: "Currently, this is a combined effort between Customer Success and Marketing. CS tracks customer quotes, contacts willing to be a reference (and calls held), and customer health/ willingness to engage.

Marketing identifies ways we can deliver this content (webinars, case studies) to help guide CS conversations."

customer success BOX

SALES HACKERS

Sales Hackers

Founded in 2016, Sales Hackers is a Brazilian Scale Up Consulting that enables revenue growth through implementation and improvement of Sales and Customer Success hacks. The only company in the world with more than 7 award CS Strategists shortlisted in the Top 200 Worldwide and named between the 25 LATAM. Located at Florianopolis, Brazil - the place of tech startups.

Right from the execution to the strategy, they scale sales and increase customer retention enabling them to sell more and retain by offering online and in-company training to develop the team for the focussed results. Sales Hackers were able to achieve outcomes of +50% ROI and +120% in expansion sales through the implementation. They have a MRR of $74k and ACV $2.5 K/month with 32 active clients.

Duda Koch - The Co Founder & CRO of Sales Hackers shares their practices followed to make room for best customer success. Learn more from it!

Q: Have you defined the Customer Onboarding process? What parts of the process are automated?

Duda: “Handoff, Kickoff, Milestones to 1st Value”

Q How do you ensure your customers reach early value?

Duda: “30 days setup followed by a Specialist with 1x week high touch call.”

Q: What are the best practices that you employ to drive product adoption?

Duda: “Measuring WAU/Mau through stick features”

Q What are the best practices that you employ for your tech-touch customers and high-touch customers?

Duda: “Tech Touch > knowledge base and automation High Touch > Calls and challenges”

Q: What are the best practices for conducting Business reviews? How often do you do it?

Duda: “We tried it quarterly, but our clients need it more often, so we change it to monthly.”

Q: How soon do you start your renewal process? What best practices do you follow?

Duda: “Through averaging Health score inputs and after 8 mo LT”

Q: What are the key metrics and/or the KPIs that you track?

Duda: “To identify renewal prospects? Metrics that are weighted in our Hscore ROI, NPS, % adoption, use, and financial.”

Q: What are the different stages you consider while mapping out the customer journey?

Duda: “Onboarding, Adoption, Engage, Growth, Renewal, Advocacy.”

Q: What is your account expansion strategy?

Duda: “We create a CSQL where CS qualify the clients through data and calls and directs them to the sales team as a new deal on Pipedrive.”

SlapFive

SlapFive has delivered the first and only end-to-end Customer Marketing Software platform, which has the essential components to automate and scale every workflow that Customer Marketers, Customer Advocacy, and Customer Engagement pros do every day: which includes customer engagement, customer advocacy, customer references, customer content, and customer insights.

Having been founded in 2015, they are set up in Boston. The first customer marketing platform that eradicates the traditional way of marketing and captures the customer's voice, infusing it in all aspects of the organization.

Read how Dana Alvarenga - The Vice President of Customer Success established the best practices in SlapFive.

Q: Have you defined the Customer Onboarding process? What parts of the process are automated?

Dana: “Yes, it is defined but not automated. There is a handoff with sales to understand the success plan for the customer. Then we have a 4 part onboarding from a kickoff to set expectations, then a strategy workshop, training session, and implementation overview. It's very high-touch.”

Q: How do you ensure your customers reach early value?

Dana: “I set a goal based on their success plan during onboarding and implementation and we all agree on a quick win for them to showcase internally the value of the solution and spotlight them like a rockstar. Luckily there are a couple of different use cases that lead to a quick win and we have baked it into our onboarding process to ensure that.”

Q: How do you impart customer training?

Dana: “Customer training is conducted with a screen share watching me go over the ins and outs of the solution. There are also some self-service tutorials for customers to review and watch and then weekly I ensure we go over use cases and make sure there are no roadblocks for them to succeed while using the product.”

Q: What are the best practices that you employ to drive product adoption?

Dana: “Best practices are aligning their goals to use cases to achieve within the product. Also driving towards integrations and automation to save time and make my clients' lives easier is the reason they chose the product in the first place!”

Q: What are the best practices for conducting Business reviews? How often do you do it?

Dana: “Business reviews have changed this year and I am just starting to conduct them later this month. I plan to have my CEO who acts as the strategic advisor to the customer, join and we all go over current use cases, future use cases, outstanding issues or roadblocks, and highlight successes. We keep it during a regular check-in time with the customer and need not fight calendar scheduling.

They bring their leadership to the meeting but are not required quarterly, ideally at least 1 time per year is my goal."

Q: How soon do you start your renewal process? What best practices do you follow?

Dana: "About 3 months before renewal I bring the conversation up."

Q: Who owns Customer Advocacy at your place? How do you go about it?

Dana: "I own it as my role is Customer Experience. So under that, it is all things about the customer from onboarding to success to advocacy and we invite all customers to join a value-added two-way exchange of value customer program where they choose what activities they are interested in participating in and we host various events, webinars, etc. It is called the SlapFive RockStars and I aim to make all my customers RockStars. I track engagement in the program and activities completed and heavily involved customers are our long-term customers to date."

Synopsis

Thank you for sticking on until here. This means that you found immense value from the e-book so far. To help you retain the key pointers, let's do a recap and look at the crucial Customer Success best practices that you can adopt!

- Ensure that you understand when and where to automate the customer onboarding process. Sometimes, in more complex platforms, automation might not be a cost-effective thing.
- Make customer education resources available either through self-help resources like webinars, blogs, articles, tutorials, training portals or virtual meetings over a call, Google meets, or online lab, or in-person onsite training and yet customized training.
- To improve product adoption, understand why customers bought your product in the first place. Show them how to use the product and get value from it. Also, remember to consistently offer solutions and support them throughout. It's vital to offer new features and updates to help customers see value in your product.
- Remember to have different approaches for different customer engagement models in your SaaS business.
- When it comes to business reviews, build a framework that has current use cases, highlights the challenges that the customer faces, and should also have a future course of action.
- A notion to renew comes with constant and consistent value offering, the adoption nurturing before renewals, starts from 8 to 6 months priorly depending on the type of customers. Some consider health score and product usage to be important metrics to be considered for value mapping.

- Along with NRR, churn rates, CAC, ARR, etc., track support metrics such as Time to first response, time to resolution, reopened tickets, etc. This is as important as it can get.
- Customer Advocacy has gained a lot of traction these days by Customer Success. It aims to convert your loyal customers into your brand advocates and to make them 'returning' customers. Customer advocacy is the final stage and requires tracking customer health can also be one of the ways to find the potential customers who would advocate. Reaching out to these potential customers is then followed up with a case study or videos coordinated by the marketing team.

Every organization has its unique practices depending on the needs and requirements of the clients or customers. Though the customer success arena has just begun to evolve, these leaders have put the right practices that work for their organization and it will continue to evolve as they grow.

These insights are worthwhile to understand the taste of customer success and how you can do better in your practices as well. So, learn and evolve!

About CustomerSuccessBox

CustomerSuccessBox is an '**Actionable' customer success platform that helps B2B Sass companies reduce churn and grow their recurring revenue.** It applies Artificial Intelligence (AI) to automate customer onboarding, product usage analysis, and user communication. Thus enabling customer success managers to deliver a superior customer onboarding experience.

Gives a 360-degree view and an end to end customer success management in one place. It uses the leading indicators to warn customers about the account risk ahead of time.

Helping clients understand customer behavior before they churn, never got this easier!

Learn more about CustomerSuccessBox: www.customersuccessbox.com