One Approach to Repeat Business: "Customer Success Managers"

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Abstract

Software vendors have pioneered the deployment of professionals charged with enhancing the success of that vendor's customers. However, now more industries are adopting the model common for software, of marketing a renewable subscription rather than requiring a capital investment. That model makes customer switching far easier, justifying for more vendors the role of Customer Success Manager (CSM). Based on 129 interviews with those individuals and those who supervise their work, the authors recommend that vendors make customer success a strategic priority, that they deploy CSM's astutely to ensure their usefulness, and that they expect competitors to begin or continue such programs.

Companies providing services via a subscription model have an obvious problem: the ease with which a customer who has made no capital investment can switch suppliers.[1] The solution devised by those suppliers -- most often of software, but the concept can work for everything from consultants to maintaining the office greenery -- has been to deploy an individual or team to increase value of their service to customers. Such vendors increasingly offer customers not only a service itself but also the help

of a customer success manager (CSM). These are individuals who manage relationships; thus the term.

Can almost any provider of services or tangible goods benefit from such an approach? To shed light on that sensible question, we describe what actually happens when a CSM or CSM team is placed in a client organization. Then we analyze, based on qualitative research and our own consulting experience, the payoff both for companies and their customers. We then offer recommendations for companies already employing CSMs, for those considering doing so – and for those who might want to begin such consideration.

Customer Success Roles

The role of CSMs differs from those of key account managers, technical sales, or customer service employees. It is broader, proactive, and more focused on customer usage via data analytics – a key characteristic, according to the Customer Success Association[2]: CSMs use data to show customers what their organization is gaining from use of the product or service in question and know enough about the customer's applications to help them use it even more effectively.

According to that same association, the focus of a CSM is to maximize the value that a customer receives from the goods or services supplied. Therefore, the primary assignment of those in this role is not selling. However, they may be evaluated on metrics related to income and profitability for both their customer and for their own firm; thus their mission is to increase demonstrated value for both. An association survey conducted annually[3] notes that a CSM typically gets involved with customers when the contract is signed, and the first step is to define a customer's "success goals" in measurable terms. Simultaneously, the CSM works out with the customer the responsibilities of both parties for reaching those goals

Then the CSM's role switches to proactive reporting of product usage by the customer and documenting outcomes associated with that usage. The CSM also handles customer interface with any part of his or her supplier organization – technical, legal, billing, or the like, serving customers as a single point of contact.

Three examples, each discussed in detail at the end of this article, provide snapshots of what a CSM might accomplish.

- Working for a software company whose technology manages the operations of customer support/service departments, a CSM might suggests simplifications. For instance, if support/service groups envision alerts for almost every situation, resulting in a cacophony of

such alerts, the CSM could help the customer's personnel to identify those most important to them.

- A CSM for an industrial machine manufacturer might advise customers that problem rates for a given part in production are increasing, then recommend a new approach to reduce the impact of such problems once the customer puts the machine into use.
- A CSM for an electrical contractor that provides an internet connected building solution may actively manage efficiencies of electrical and heating/cooling usage based on sensors that monitor actual building activity, rather than anticipated patterns.

Researching Factors Leading to Success

The three examples illustrate how a CSM can be useful. Presumably, however, not all organizations deploying CSMs see that effort pay off. We therefore set out to identify what leads to success. Our method was qualitative research: interviews conducted with 129 customer success managers and those who direct their work. We began with respondents whose names were provided by a customer success platform company, then used their recommendations to recruit others and interviewed most through video conferences lasting between 30 minutes and one hour.[4]

These interviews with providers of CS were supplemented with observations from those on the other side of the relationship: customers of such organizations. Comments from these customers are simply anecdotal, informally offered to the authors, but provide a range of insights, positive and negative. Thus we have both sides of the picture: observations of CSMs and those receiving their services.

What CSMs See as Benefits

Providers of CSM supported the point that customer success benefits the suppliers of services to that customer – but that it benefits the supplier more predictably if the customer is made aware of the usefulness of the service provided. Those we interviewed listed benefits to their own firms in five areas. These are:

1. Customer retention
2. Customer referrals
3. Customer Contract expansion
4. Product improvement/innovation
5. Financial results.

Specifics included the following:

1. *Customer retention: The obvious benefit of having a proactive CSM is to ensure that the customers routinely use services effectively.*

   "When the customer decides to first buy our solution, our CSMs prepare the transition to our new solutions and educate the customers for a smooth integration of our solution into their daily processes. Otherwise our solutions become 'shelf ware'-- purchased but never used –and   if the customer does not see the value from our solutions, they will not renew their subscription. When we decided to set up a customer success team, we saw that our renewal rate went up, and the more we could document customers using our products, the more they ended up staying with us."- Firm A, a global software vendor that offers a portfolio of pure licensing products, subscription products, and hybrid products.

   "Our CSMs play a critical role, especially during the onboarding phase, to ensure that there are no initial glitches. Another critical role our CSMs play is when they hold their QBRs (quarterly business reviews) and highlight the value realized by the customers. In our line of business, failure to do so leads to customers' constantly underappreciating the value that our solution brings to their business; this part of the CSM's role is as important to customer retention as is onboarding and customer education"- Firm B, a customer success platform vendor.

   "We CSMs are the only ones with the constant radar looking for how the customer is reacting to our products/solutions and what problems if any arise. Sure, we have customer service that can help the customer when they have problems, but the key to earning the trust of the customer is if we point out a problem even before the customer realizes it and we proactively work to fix the issue. We have had several instances where our customers have praised our proactivity as a reason they choose to work with us, even if we are not the cheapest supplier"- Firm C, a data-driven hiring platform.

2. *Customer Referrals: Satisfied customers can act as advocates, voicing positive opinions on social media platforms and open to acting as a source of reference to other potential customers.*

   "Our salespeople usually find it difficult to get some of the key decision makers in the customers' organization to act as a source of identifying leads/prospects from other companies. However, in many

instances, our CS team members have access to multiple people in the customer's organization, and some are more open to referring us to their counterparts in other organizations. We then pass those names on to our salespeople, and they look at us as their 'best friends' since we bring in a bunch of more qualified leads."- Firm C

"In our organization, the customer success team is under the supervision of the sales department, and we are one of the few organizations where the CS team shares common KPI (key performance indicators) with the sales team. So it is in our best interest if the sales team performs well; our performance is linked to their performance. We actively look for potential leads every time we have the chance to interact with our customers."- Firm D- a cloud-based CRM vendor.

3. *Customer contract expansion: CSMs can help cross-sell and upsell to their customers.*

"Once our CSMs were able to demonstrate the value of our solutions, some of our satisfied users actually provided us with names of contacts within a different business unit and we were able to pass them on to our salespeople who ended up closing the deal"- Firm E- a sales enablement platform vendor.

"When we were a newcomer in the market, some prospects were wary of our capabilities. One of our main customers today decided to give us a chance by investing in a couple of subscriptions. We were thrilled to have this customer and asked our CSMs to work closely with the customer. As the project progressed, not only were we able to deliver on our promises, our CSMs were able to convince customers to pay for more subscriptions, and all that the salesperson had to do was come and close the deal"- Firm E

"We are a global player of software products and a significant reason for our growth is due to acquisitions. We ended up with a wide portfolio of products from the acquisition, but we also acquired their salespeople. So like typical big organizations we were targeting the same customer but with multiple salespeople, leading to huge inefficiencies. Luckily for us, a decision was made to create a customer success function to help our customers integrate our multiple products into their daily activities. Our customer success teams were able to point out the synergies that existed

in our portfolio of offerings and we ended up cross-selling our different solutions to the customer"- Firm A

4. *Product Improvement/Innovation: Interactions with the customers during the onboarding process and the monitoring process let CSMs spot issues with their products and take feedback to their product teams to prompt improvements.*

"We are an open-source software company, which means that a lot of customers use our platforms and make improvements to them. As CSMs, we closely monitor the changes/additions/edits that the customers make to our products and then provide this feedback to our product teams to make improvements"- Firm A

"One of our customers came to us with a specific request that our product was not equipped to handle. An analysis indicated that when the salesperson had sold the product to the customer, neither of them anticipated how much change would be needed in the customer's processes, and managing this change was not possible with the existing solution. The CSM spotted this problem during the customer onboarding process, enabling us to improve the product and now market it to other customers too."- Firm B

5. *Financial Drivers: In some situations, the CSMs let a supplier save on costs.*

"When we began as a startup and started to grow, we did not specifically have any criteria for choosing how to support our clients. Our focus was on small and medium businesses, and each CSM was responsible for 950 accounts. We quickly realized that we could not serve all of our customers and had to start segmenting them. Soon enough we were able to distinguish between those customers who needed a more 'high-touch approach' against a more 'low-touch' and 'tech-touch' approach. This sorting helped us to more effectively allocate our resources to the right kind of customers, where we could also upsell and cross-sell. We began with CSMs not having quotas, but with our access to the right decision-makers in a company, we were soon given targets, and this emphasis freed up the salespeople to focus on new customer acquisition. We started reporting customer success KPIs along with sales KPIs, and the CS function was seen an effective way for resource allocation and for increased sales efficiencies - Firm D.

The vendor quoted here is hardly an outlier in connecting CS teams to revenue, although CS goals are at the group or team level, whereas sales goals are at the individual level. In the annual Customer Success Association five years ago, no survey respondents reported any connection to revenue, but in their 2019 findings, more than 80% of CSMs deployed by software companies did have such connections and therefore were likelier to avoid being obliterated during periods of cost-cutting.[5]

The Customer Perspective

We also heard informally from customers of firms providing CSMs, whose views were divided about such programs. On the positive side, they saw benefits like the following:

- "The CSM asked a ton of questions about how we handle our customer to get a really good understanding of our business. He has substantial experience, and that makes me feel like he is an expert and that I'm in safe hands."
- "Our CSM really worked with us to help iron out our problems and made sure that everything was accomplished in a timely manner."

However, some comments were less enthusiastic. Qualms about CSMs centered around their priorities and their helpfulness. For example:

- "The initial CSM was invested (as I interpreted it) in our success as it related to the use of their platform. This investment dwindled as we were assigned a second and then a third CSM. I just found out we are about to get our fourth."
- "While the CSM did try to work with us to develop a success plan, it was 'success' as <u>they</u> defined it."
- The CSMs kept changing, which meant that we had to start from scratch each time to explain what we were trying to achieve. The company didn't seem to be training their CSMs very well."

Recommendations

While the comments above represent only anecdotal observations from individuals willing to discuss the effects of Customer Success Management, we can nevertheless offer tentative recommendations and based on our interviews and also our consulting experience. We offer three: the need to make customer success a strategy priority for one's own firm, the need to make a CSM truly useful, and the realization that if a firm's competitors are not now deploying CSMs, they soon will do so.

First Recommendation: Make Customer Success a Strategic Priority

Our first recommendation is to make customer success a metric measured by and important to one's own firm. Reportedly, CRM initiatives failed initially because CRM was seen as a technology/tool, rather than being seen as a strategy.[6] The key is to link customer success to the mission and vision of an organization, saying, however phrased, that our company exists to allow our customers to do a better job of [whatever our service assists with]. For example, Salesforce.com places on its Website the statement that "We help our customers achieve extraordinary things so that we can continue growing together, because their success is our success." [7]

Then the measurement of customer success becomes the path to evaluating the CSM effort. Offsetting the cost of deploying CSMs, a company that makes customer success a strategic focus uses measures like the following: Does the customer renew? How do they rate their satisfaction with our service, and how does that compare to previous ratings? Also, how many uses of our product can we tally for each customer, to assess whether the number is rising, falling, or holding steady?

Unless customer success is a strategic focus, other priorities can foil a CSM effort. For example, the customer comments about enduring a series of short-term CSMs indicate that the vendors deploying those individuals had other priorities. No customer would find a sequence of four CSMs coming their way, possibly as part of training rotations, if the company providing those individuals described its own mission in terms of the success of its customers.

For example, a large vendor of financial software evaluates individual CSMs on revenue retention and expansion <u>but also</u> on progress according to individual customer success plans as developed with customers. Other metrics include increase in adoption of key application features, and recruitment of customer advocates.

Second Recommendation: Make Sure the CSM Can Be Truly Useful

Even in organizations that integrate CSM efforts with strategy, a second issue is the usefulness of the CSM role. Wise CSMs coach their customer firms to use their help astutely; a CSM perceived to be a product pusher has not been trained adequately in how to be a trusted advisor.[8] Overall, usefulness appears to be a function of who takes on the CSM role, how they are trained, and how they in turn train customers to benefit from their help.

A CSM is responsible for not just reducing churn;[9] also, that person -- or that team – takes on activities usually reserved for individuals with defined functions like service delivery responsibility and value communication to customers.[10] CSMs train customers to benefit from their firm's services, and

they also provide customer support, have the sales acumen to ensure future sales, and when necessary have the ability to do business presentations to customers.

Table 1. A Customer Success Team at Work

	Aspects of the role	How Implemented
Examples of General Daily Tasks	CSMs utilize software to keep the customer moving toward goals they set for product use.	Daily, CSMs may make 20 phone calls, host 2-3 virtual meetings, and facilitate emails to connect customers to support functions
Examples of Incoming Customer Interactions	Customers typically are "trained" to contact the CSM first, with questions about new features, technical issues, and other problems	Sales to services handoff meeting, new customer kickoff meeting, goalsetting, success planning, expectation setting
Examples of Interaction with other Internal Departments	CSMs are a "single point of contact" for customers to a range of departments relevant to a customer.	Customer Support, product deployment teams, product development teams, data science, marketing, accounting, legal, consulting, engineering
Meetings to Communicate with Customers	A range of meetings allow different stakeholders to be included (e.g., end-users in monthly meetings and executives in the annual meeting) - ensuring that multiple levels of the buying organization realize value outcomes.	Monthly, quarterly and annual meetings to discuss product release notes, event notices, stakeholder/end user touchpoint between CSM, end users, and executives
Proactive Customer Engagement	CSMs often reach out to customers about new product improvements and employ data usage metrics to improve adoption and results for the customer.	Deployment/product milestones, product adoption changes, training, customer workshops, renewal planning, consulting/services opportunities
Examples of Unplanned Customer Engagement	CSMs must plan for the unforeseen.	Changes within the customer organization (e.g., new buyer, acquisition, or growth/retraction of operations) or unintended effects of a product upgrade.

In "A Customer Success Team at Work," the exhibit shows how the process is implemented (See Table 1). The exhibit is based on the experience of one firm deploying individuals who, depending on their sector of the organization, may be called a CSM, customer experience manager, or partner services manager. For instance, as shown in the row labeled "Proactive Customer Engagement," a CSM commonly educates customers about new products and/or how data usage metrics suggest the possibility of greater usage in an area now underutilizing what the vendor provides. The mechanisms may include everything from training workshops to simply pointing out milestones, communicating information like: "As of this past Wednesday I can document that you have reduced your costs for this function by 10% below where they were at this time last year; here are the numbers."

Certainly, a CSM's responsibilities vary depending on what will help a customer and also the extent to which customers are willing to learn and change. However, the basics are the same: this is a multi-faceted role.

Third Recommendation: Assume that Competitors Are Considering CSM

It's tempting to believe that "our industry doesn't need people to tell customers how to use what we sell." However, two issues call that assumption into doubt.

The first is marketing reality: Any firm selling a service for which the switching costs are not high enough to preclude switching may have a higher stake in helping customers to wring the utmost value out of that service than do those customers themselves. Therefore, many service categories may see competitors realizing that they could benefit from the basic premise of a CSM based model: that service plus the expertise to use it more effectively is worth more than service alone. As more vendors offer services by subscription -- as do Microsoft, Oracle, and Salesforce, to offer well-known examples -- an increasing number of managers will initiate consumer success management. Quite possibly, that reality suggests the merits of being first in an industry to add this benefit rather than playing catch-up.

The second issue is the temptation to believe that no CSM is necessary for one's industry because the service or tangible product is self-explanatory. The facts, especially but not only in the software industry, are otherwise. Any complex/powerful technology product will require an investment in learning by the user in order to obtain the increased productivity and profitability benefits it promises.[11,12] Therefore, personnel in a customer's organization will need either time to increase their knowledge of that product's capabilities or expert guidance to advance beyond the surface usage level. For customers learning on their own, this will be an at-risk period where they may be open

to the alternative suppliers. The ever-growing ease of migrating data makes it increasingly easier for these customers to switch to other vendors' products, making the likely question not "will our competitors start to offer customer success services?" but rather "<u>when</u> will they start?"

What Else We Learned

Having talked with – and listened to -- CSMs and also their customers, we add a recommendation on where CSMs should expend the most effort: those functions in a customer's organization that are high in importance but poor in results. However, wise CSMs start with diagnosis on both dimensions, since managers in the client firm are not eager to say "Our results are poor." In contrast, managers in functional areas that are doing well may want the CSM's attention to publicize their successes internally, and it may be helpful to spend time with them to learn what has led to their better results.

Another insight involves a timing issue: When is the best point of engagement (POE) at which a CS team or individual begins significant interaction with a customer? We observe from listening both to CSMs and to their clients that this POE is steadily moving earlier in the overall customer journey, with most firms introducing the CS group to the customer when the contract is signed. However, many have been working with the customer much earlier during the prospect qualification, sales engineering and design phases – presumably increasing the likelihood of achieving that signed contract.

How to Think Like a CS Specialist in Any Category

Although the CSM role has become common in Software as a Service (SaaS) solutions, it also includes industries like those mentioned earlier: industrial steel and electrical contracting. Furthermore, for software the role of a CSM may also have a consumer context. We review the CSM roles for three companies to show the range of their activities.

The CSM Role in B2B SaaS Technology

Our first example is Civitas Learning, a technology provider to colleges and universities.[13] Civitas CSMs use e-mail, webinars, and direct communication to interact with customers by providing actual usage numbers. For example, the CSM might tell a client: only 32% of your employees use our email tracking and follow-up feature to directly assess marketing communication effectiveness, or might report: last quarter, the effectiveness of marketing messages increased by 27%, as demonstrated by the increase in student action on tracked messages. To help Civitas evaluate the CSM, a comprehensive score of customer health incorporates

satisfaction, product usage, support ticket frequency, and other indicators of engagement.

A B2C Application

Civitas also illustrates the value of a CSM role in a business-to-consumer marketing context. In their customers' higher education settings Civitas CSMs may take on the role of a Student Success Manager: helping students succeed at navigating a complex and dynamic path to graduation and a career.

More than guidance counseling, Student Success Managers monitor student engagement and progress to reduce failure and withdrawal by students who can easily become overwhelmed by the complexities of earning a college degree. Similar to CSMs, they use data inputs to monitor if students are thriving, surviving, or failing across classes and campus life, using Civitas software to compile and interpret a wide variety of data points to decide which students are at risk in what classes.

Civitas also develops insights to fix problems for future students even before they occur. For example, complex prerequisite demands across related classes can make on-time graduation impossible. Student Success Managers can anticipate this problem and petition a short-term solution for current students, while also advising on long-term policy changes to remedy similar problems for future students.

B2B Industrial Steel Inside Account Manager Role

In the industrial steel setting, the inside account manager role is quickly emerging as a vital way that commodity firms can differentiate their product-based solutions. CEO Stephen Armstrong of O'Neil Steel, LLC describes the "Inside Account Manager" role as one version of a CSM.[14] O'Neil Steel is described as a "supermarket of steel" that serves a diverse set of customers that use raw steel in production of automotive components, customer fabrication, structural applications, and any manufactured item that includes steel.

At O'Neil, the inside account manager does not sell, but contributes to cost savings based on data from sensors on many of O'Neil's products that allow real time tracking of how those products are transported, used by customers, and ultimately become finished goods. Inside account managers pair information from sensor data with industry knowledge to help customers reduce transportation costs, holding times, and waste from poorly sized raw steel stock. Armstrong says that inside account managers have helped O'Neil transform transactional customers into loyal partners.

B2B Electrical Contractor Solution Manager Role

Mayer Electric, our third example, is moving from a product-centric to solution centric approach. According to Wes Smith, their president, the company has shifted from a distributor of wire, lighting, and electrical components to now providing connecting electrical components with "internet of things" solutions.[15] For example, Mayer's solution managers utilize data to adjust configurations and propose new facility use patterns for complex networks within lighting systems that monitor room temperatures, air quality, occupancy of rooms, and ambient light levels to adjust systems to best suit the needs of the customer, while delivering peak efficiencies.

The solution manager is new for Mayer, as its customers move from turn-key solutions that Mayer installed but did not service to managed solutions. Smith says that having a dedicated employee focused on helping customers to deliver value is critical to selling the installation in the first place.

The Expanding Importance of the CSM Role

Our examples suggest the likelihood that the role of a CSM will spread across industrial and consumer settings. For example, forward thinking health clubs are pursuing CSM-based ways to keep their customers on track. Companies like Michelin, that used to sell tires, now sell miles driven to corporate customers – where CSM-based employees monitor and proactively manage the highest efficiency of customer fleets. The common thread here is a CSM taking over management of the relationship with customers from a sales force that has different priorities, to better deliver value to customers, anticipate future customer needs sooner, educate customers on changing solutions, and provide a consistent point of contact for the customer.

In summary, we offer five recommendations to those deploying CSMs or considering doing so:

1. Make customer success part of your own organization's strategy
2. Train your CSMs to be truly useful and aware of how to educate the customers they are working with to benefit the most from their knowledge and skills
3. Assume that your competitors will be deploying CSMs if they are not already doing so
4. Recommend that the CSMs focus on those areas in the customer's organization that are high in importance and poor in results
5. Let a CSM or CSM team engage early with even firms that are only prospective customers rather than waiting for a formal arrangement.

And we add a final note: mining the descriptions offered here of how a CSM can be useful can give any organization, in any industry, better odds of 1.) a competitive edge, and (2.) successful customers.

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