



## Webinar Notes:

**Topic:** Aligning your organisation around a focus on Customer Success

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## Why alignment?

If we start to think about the current state of play, there is a definite sense that the role of the Customer Success team and the individual CSM is not fully understood.

Success Methods have asked all attendees to their training courses over the past 2 years if they felt the wider business understood their role and perhaps unsurprisingly 75% felt they were not understood.

Here we have a major opportunity to develop peoples understanding and ultimately deliver greater value to customers.

## Why would we want to align around a focus on Customer Success?

We think there are 4 main benefits of doing so:

- Increase internal efficiency
- Improve customer experience
- Increase customer value
- Increase revenue

**56% of our attendees said delivering value is the most important reason**

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## The Customer Success Pipe

If we compare and contrast between the disciplines sales and Customer Success. In sales we expect a Sales Funnel, we are used to and accept the is drop off, from prospect through to customer. However, conversely in Customer Success we ideally want to see a 'Pipe' not a funnel. We want and should expect to bring everyone along on the customer journey.

To do this you need to think of it as a company-wide approach. Customer Success is both a philosophy as well as a function.

**'Customer Success as any effort that is intentionally invested by a company to ensure its customers realise the maximum value available from their investment in the company's products or services.'**

## Customer Success Maturity – What mode is your organisation in?

### Reactive mode



Here Customer Success teams are reacting to a problem customers have eg. bugs, tickets and platform issues. Challenge with being in the reactive state is that you are often viewed as tactical rather than strategic by your customers and not set up to deliver value.

### Proactive mode



Here teams are beginning to understand what's happening with their customers, what is causing customers to be successful and using insight to develop best practices. There will be some measurement in the Proactive state. Often proactivity tends to be features based rather than value and outcome focused. During this stage, opportunities to align around measurement and consistently drive value start to emerge.

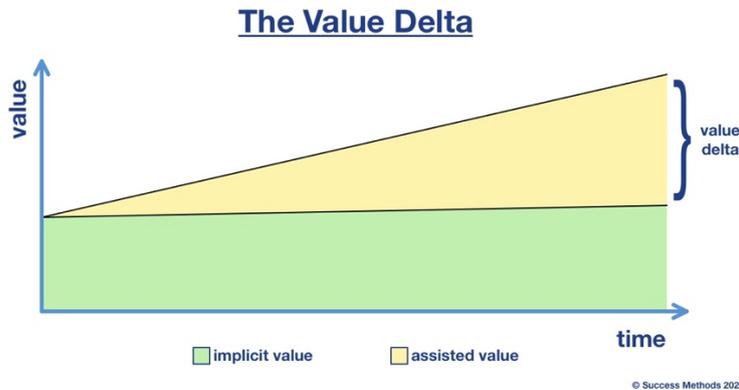
### Data Driven mode



Here you start to become value and outcome focused and to be seen as a strategic resource. You understand customers and really deliver what they need in a timely way often pre-empting problems.

## The Value Delta

This concept is helpful to understand

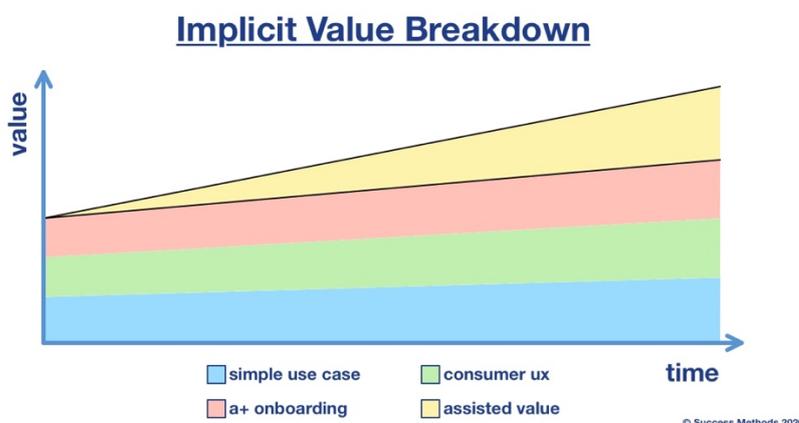


When you sell your product there is already some implicit value delivered to the customer. For example, products like Zoom have a simple use case and we can obtain value really easily. It has a high implicit value.

The Assisted Value or the 'Value Delta' is the additional value we can deliver to clients. Eg. Within a complex CRM product the Value Delta will be a lot larger as to realise all the value customers will need additional support.

There is a lot you can do to build implicit value, and therefore free up time for CS to really focus on the high value elements and build value. We think everyone in the company can contribute to this implicit value. There isn't a part of the company that doesn't affect customer value either positively or negatively.

The executive role is critical. We need the C-suite to set the tone. Without this alignment around a focus on Customer Success is really hard to do without the support and the mandate being given to the customer success team.





## How do we build a case for our executives?

There are two quick ways you can do this today.

1. Preparation - Put together key alignment opportunities that could be tackled immediately. For example – you might decide to introduce a monthly renewals picture to support finance.
2. Identify Trust points – Take a look across the customer journey and find areas we you are potentially losing trust? E.g. Are we promoting services we don't actually do? This can be a source of great dissatisfaction for customers.

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## A common language for Alignment.

Different people have different languages, it's important to try and communicate in the right way, we need to use a common language with the different parts of the company. Think about the basis of the relationship with each team and understand the common language.

For example:

**Align with Sales** - With sales you need to be talking about how you can drive revenue.

**Align with Finance** – how can we help you get more insight and how can you help free up time and reduce admin

**Align with Product** – Product won't tolerate one off requests so be sure to gather data to request features.

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**YOU are the conductor of the orchestra – you need to ensure everyone is in harmony to align around a focus on customer success.**

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## About

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Our main focus is Sales and Customer Success recruitment.

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