

SCALE

Customer Success Council

Building Your CS Team from the Ground Up

October 11, 2024

Today's workshop leader



Rachael McBrearty

Chief Customer Officer
Evisort

Today's Agenda

- Welcome, introductions (15 min)
- Building Your CS Team from the Ground Up (45 min)
- Discussion: What CS challenges are you facing currently? (30 min)

**We help our portfolio
build and optimize
hyper-growth GTM
machines**

What is the GTM Advisory?

Advisory

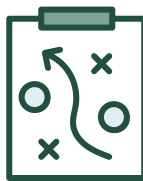
Been-to-market expertise



**Advising over 55% of the portfolio
with bespoke GTM consulting**

Content

Step-by-step guides



**Distilling decades of experience into
80+ practical tools and frameworks**

Events

The power of community



**Connecting EIRs, advisors, and
portcos at 40+ events per year**



Introductions

1. Name
2. Title
3. Company

Building Your CS Team from the Ground Up

Why CS matters for Series A/B companies

Existing customer revenue is getting more significant as you scale

Neglecting existing customers adds long-run costs (e.g., churn, lower upsell, more pressure on sales teams)

When initial growth slows, free cash flow becomes important

Spending needs to align with realistic growth forecasts to adhere to the “Rule of 40”

Efficient growth remains a central focus over time

Investing in CS is the best way to achieve lower-cost growth

Customer Success needs to be an integral part of part of GTM Operations

CS is enabled by...

Designing focused value props

Building focused propositions that can scale, with defined “land” packages for Enterprise

Optimizing S&M spend

Identifying accounts with highest growth / potential to receive the most coverage

Reporting operating data

- Marketing funnel
- Lead generation
- Sales quota attainment
- Win rate
- Cross- / upsell
- Churn

Evaluating customer health

Monitoring analytics for proactive upsell & churn prevention

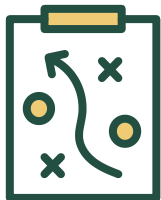
Feedback to marketing, sales, and product

Maturity model for CS

	Reactive	Repeatable	Proactive	Predictive
Gross Retention %	80%	87%	89%	93%
Net Retention %	92%	106%	113%	125%
Operationalize the Customer lifecycle	AD hoc account segmentation, reactively supporting the customer in the same way	Agreed upon segmentation and some proactive outreach	Fully deployed optimal lifecycle by segment, comms, best practice playbooks including EBR process, 1: many process	Fully integrated lifecycle across all related functions leveraging 1: many and 1:1 human touch points
Health Management	Ad-hoc reactive response to customer escalations, no standard processes	Health risks manually assessed by the CS org and prioritized on a weekly basis	Health risks proactively identified, leveraging some data sources that are categorized by type	Health risks proactively identified across all sources of data, cross functional processes in place to mitigate risk
Demonstrate Value	Inconsistent methodology and cadence for showing value to customers	Leverage adoption data as primary metric to communicate value	Document customers strategic outcomes and demonstrate achievement of those outcomes using data	Systematically communicate customer on progress and achievements to desired outcomes
Drive Expansion & Advocacy	React to requests from customers, passing lead to sales manually	Data pulled manually to forecast and assess expansion opportunity (grow/protect strategy)	Customer adoption behavior proactively monitored for expansion and advocacy, targets set.	Automated processes to identify expansion and advocacy opportunities, contributions tracked and incentivized.
Cross-Functional Collaboration	Progress on objectives & customer status communicated in email or meetings	Each org monitors progress to objectives via separate automated reports and dashboards	View of the risk drivers across portfolio to make strategic decision and align resources across the team	Automate dashboards used at all levels of the organization and across functional teams

Steps to building a predictive CS team

1



**Map the CX
journey**

2



**Design the
process**

3



**Hire the right
skills**

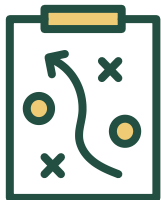
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**Build the metrics
model**

Steps to building a predictive CS team

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**Map the CX
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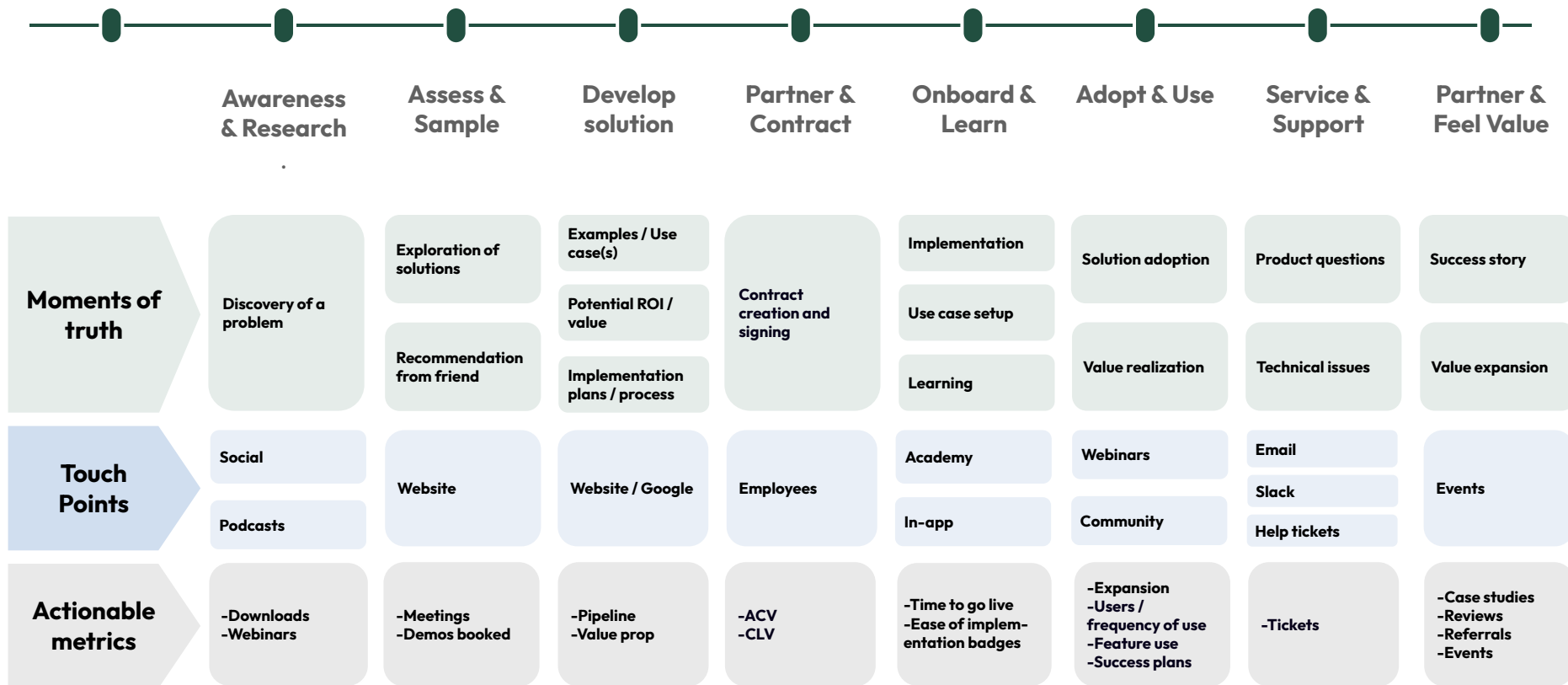
**Hire the right
profiles**

4

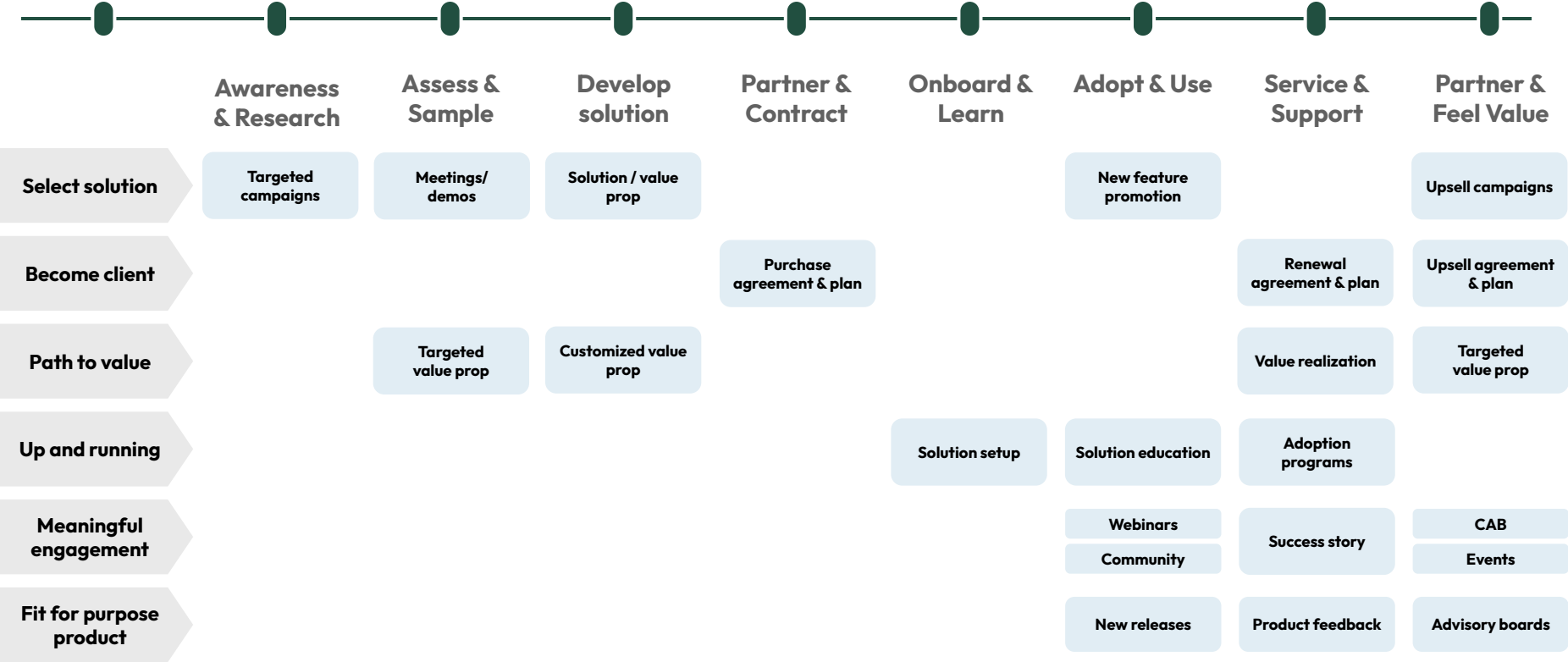


**Build the metrics
model**

Provide a framework to guide the work (front of house)

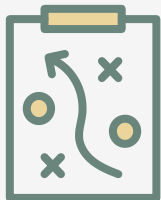


Determine accountability (back of house)



Steps to building a predictive CS team

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**Map the CX
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**Design the
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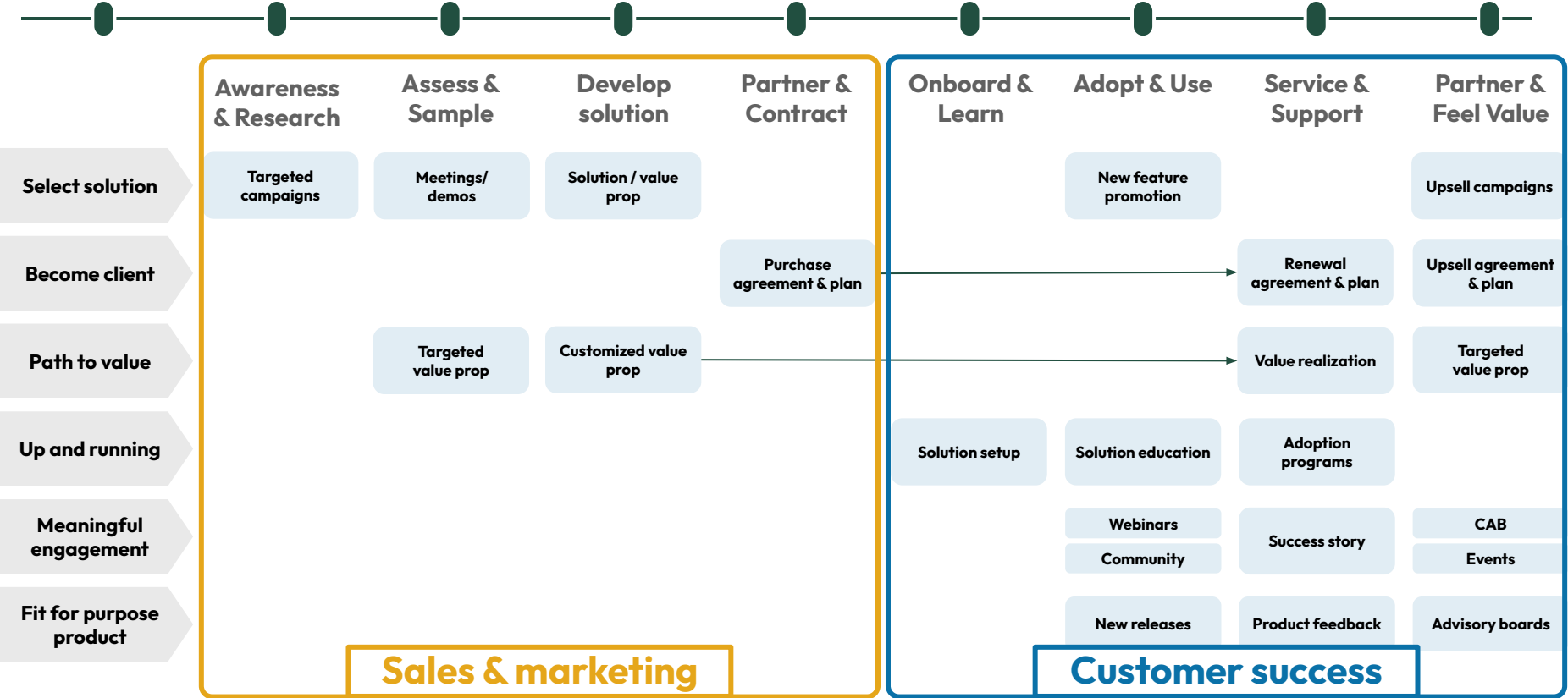
**Hire the right
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4

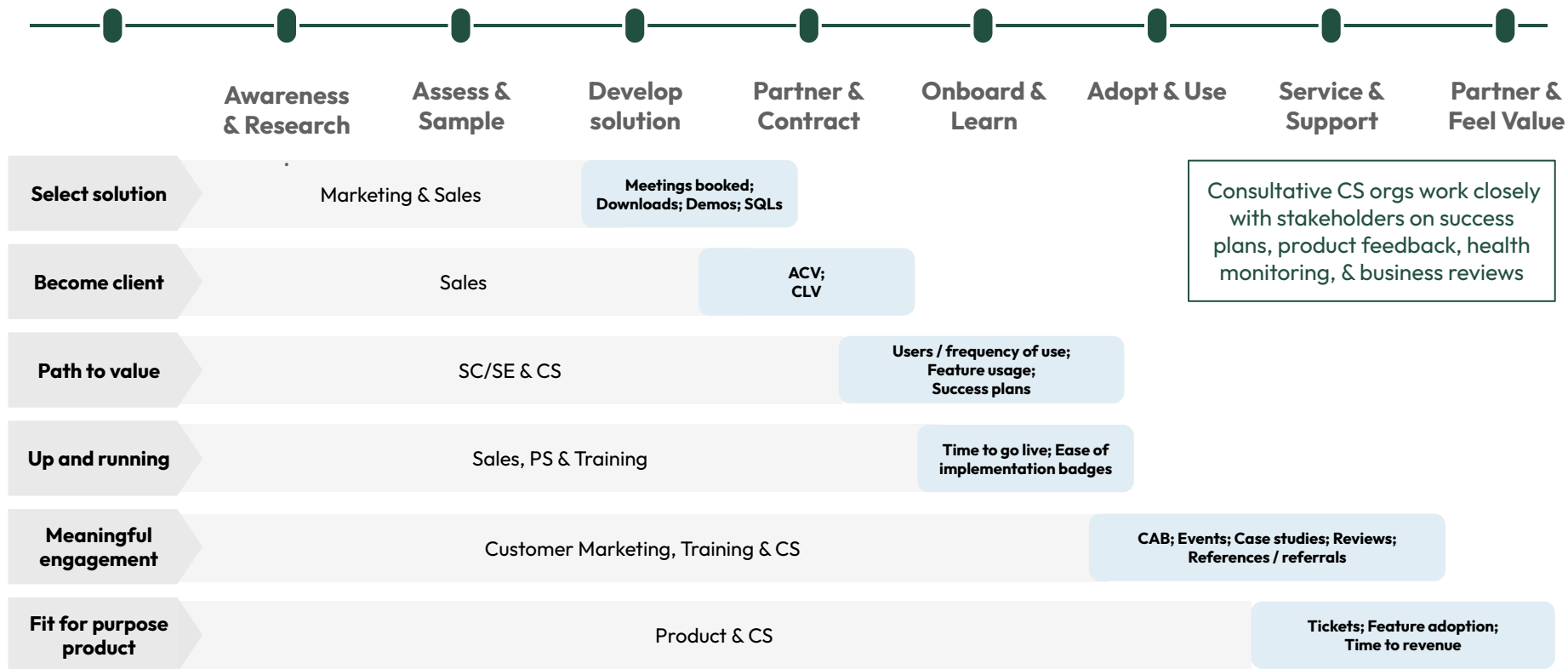


**Build the metrics
model**

Determine accountability (back of house)



Determine accountability (back of house)



Align resources to account revenue / potential

HIGH TOUCH Digital Support

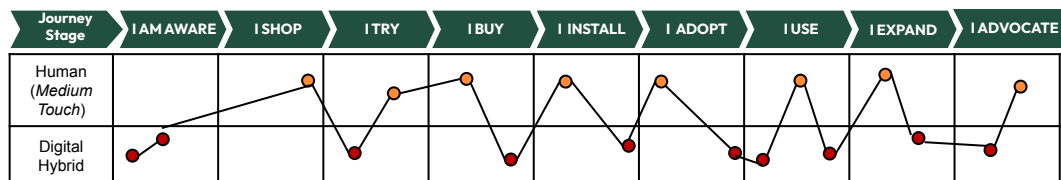
Team Roles

- AE
- Services
- Product
- CSM
- Partner
- Training



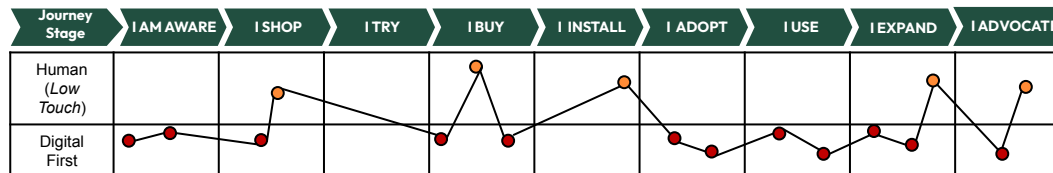
MEDIUM TOUCH Digital Hybrid

- AE
- Services
- CSM
- Training



LOW TOUCH Digital First

- Services
- CS Team

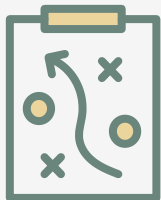


Process overview

	Onboarding	Adoption	Renewal	Expansion	Advocacy
Activities	<ul style="list-style-type: none">• Pre-to-Post Sales handoff• Implementation plans• New user training• In-app handholding	<ul style="list-style-type: none">• Proactive issue identification• Case resolution• Product feedback• Certifications	<ul style="list-style-type: none">• Account success plans• QBRs• Risk indicators• Opportunity Management	<ul style="list-style-type: none">• Customer org chart maps• Account-based marketing• Expansion playbooks• CSQLs	<ul style="list-style-type: none">• Customer advocacy board• Customer ROI demonstration• Peer benchmarking
Customer signals	<ul style="list-style-type: none">• Time to value (TTV)• Customer effort scores• Time to Onboard	<ul style="list-style-type: none">• Monthly active users (MAUs)• Usage trends• New logins	<ul style="list-style-type: none">• Stakeholder engagement / check-ins• Product instability (bugs)• Time to case resolution	<ul style="list-style-type: none">• Usage overage• Beta participation• Use case exploration	<ul style="list-style-type: none">• References• Case studies• Reviews

Steps to building a predictive CS team

1



**Map the CX
journey**

2



**Design the
process**

3



**Hire the right
profiles**

4
























**Build the metrics
model**

First step: defining your CS organization type

Variable	High	Medium	Low
Product maturity	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Product complexity	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Need for value case	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Complexity of initial use case	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Time to implement	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Customer learning curve	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
ACV/CLV	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

Criteria and setup of a technical CS organization

Variable	High	Med	Low
Product maturity			
Product complexity			
Need for value case			
Scope of initial use case			
Time to implement			
Customer learning curve			
ACV/CLV			

Technical CS

CS

- Uses strong product skills to work closely with Product
- Focuses on product adoption and usage
- Provides support and guidance to select stakeholders






















AE

- Focuses on retention and revenue generation
- Creates Account Plans and works closely with clients
- Handles renewal, cross-sell, and upsell

Marketing

- Supports Sales with campaigns and ABM
- Runs customer engagement and advocacy activities

Criteria and setup of a consultative CS organization

Variable	High	Med	Low
Product maturity			
Product complexity			
Need for value case			
Scope of initial use case			
Time to implement			
Customer learning curve			
ACV/CLV			

Consultative CS

CS

- Focuses on business value and engagement
- Works on Business Reviews, Success Plans / CSQLs
- Works closely with many stakeholders

AE

- Focuses on revenue generation
- Takes lead from CS
- Creates growth strategy
- Manages renewal, cross-sell, and upsell

Marketing

- Supports Sales with campaigns and ABM
- Supports customer engagement and advocacy activities

Second step: hire your CSMs and define their responsibilities



Principal CSM

- Works with **largest, most complex** accounts
- Collaborates with AEs to **secure renewals & upsells**
- Understands client's **use cases, adoption trends, & sentiment**
- Helps customers **meet their business objectives**
- **Provides input** to Product, Marketing, & Sales



Senior CSM

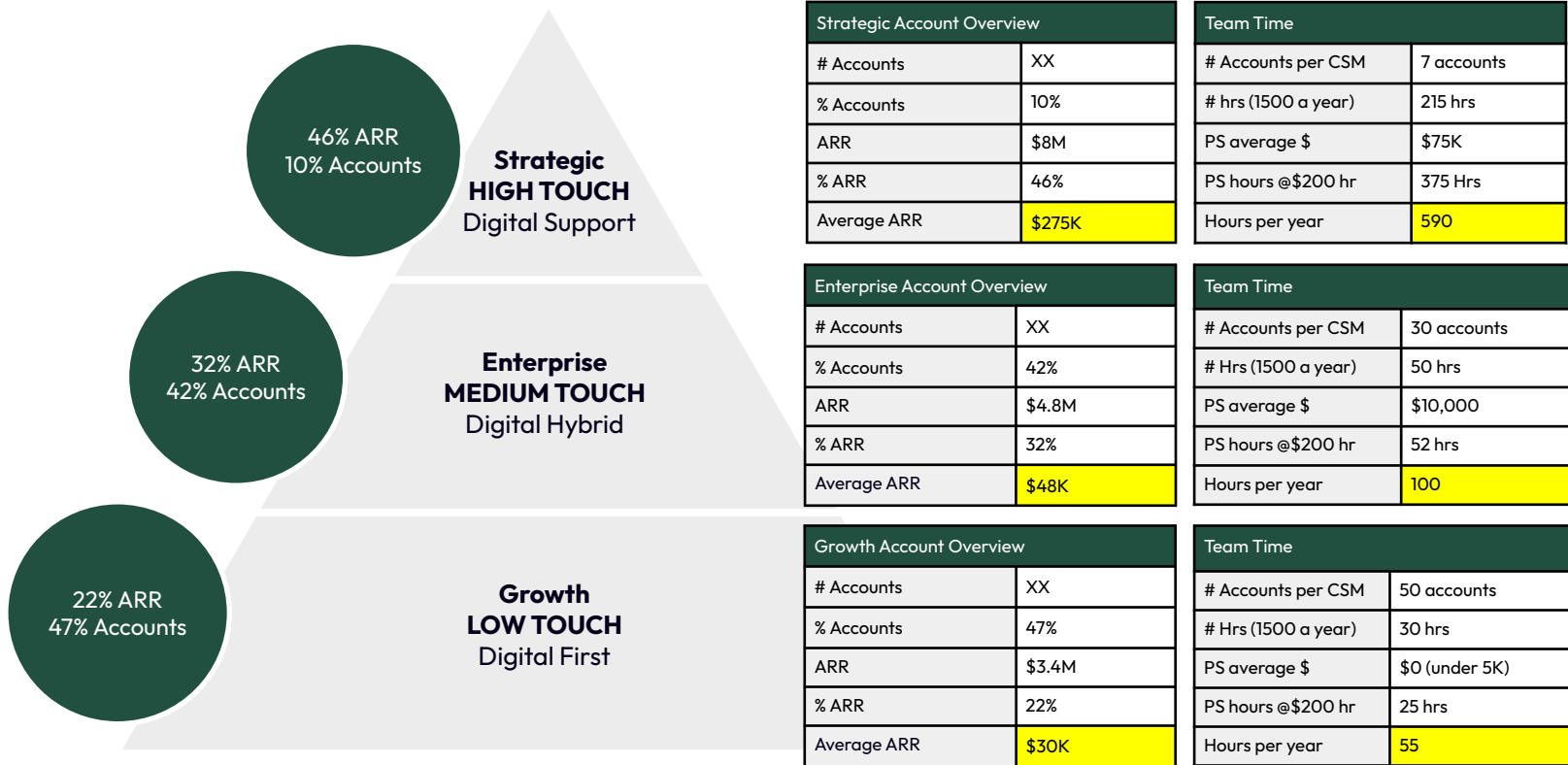
- Same as Principal CSM for **global enterprise** and **strategic** accounts



Digital CSM

- Works with **SMB & mid-market** accounts
- Manages **automatic milestones and triggers** to forecast NDR and design targeted digital outreach
- Creates **automated expansion plays**
- Collaborates with AEs to **secure renewals & upsells** from growth segment

Third Step: Align resources to account revenue / potential



Summary

Org Type + Complexity = CSM Org Strategy

Technical CSM

Strategic

Consultative CSM

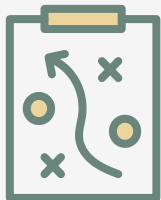
Enterprise

SBM/ Growth

- Skill Set / RACI
- Capacity
- Metrics

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**Hire the right
profiles**

4



**Build the metrics
model**

Cheat sheet: key leading and lagging indicators

Leading

CHS
Customer Health
Score

NPS
Net Promoter
Score

CSAT
Customer
Satisfaction

ACV
Annual Contract
Value

CLV
Customer Lifetime
Value

Lagging

GDR
Gross Dollar
Retention

NDR
Net Dollar
Retention

Churn
(Logo & ARR)

Expansion
(Logo & ARR)

Discussion: Current CS challenges

If you have questions or interest in doing in a deeper dive with the Scale advisory team, please email:

mark.gustaferro@scalevp.com

Appendix

Principal Customer Success Manager

Summary: Works with our largest and most complex accounts, focused on accelerating digital and transformational contract management and intelligent analytics, while ensuring high user adoption and usage. This role carries the responsibility for providing guidance and direction to internal team members working on the accounts,, as well as develop strategic growth and retention plans for securing renewals, upsells, and expansion.

Responsibilities

- **Identify upsell/Cross Sell:** Collaborate closely with Account Director/Executive, Solutions, and senior leadership, as necessary to develop actionable strategic plans to secure renewals, upsells, and expansion opportunities
- **Client Management.** Communicate with the client and their stakeholders about their goals and objectives, use cases, adoption trends, sentiment, and mining opportunities for a deeper engagement
- Forge strong relationships
- **Customer Success Plans:** Provide overall direction and support to the customer on their business objectives and needs; while communicating best practices; analyzing results; and adapting approach and tactics, as required
- **Product Guidance.** Represent the voice of the customer and their stakeholders to provide input into Evisort’s core product, marketing, and sales process

Key Metrics

Objective: **Best in Class Experience**

Key Result:

Key Result:

Key Result:

Objective:

Key Result:

Key Result:

Senior Customer Success Manager

Summary: Works with global enterprise and strategic accounts, focused on accelerating digital and transformational contract management and intelligent analytics, while ensuring high user adoption and usage. This role carries the responsibility for providing guidance and direction to internal team members working on the accounts,, as well as develop strategic growth and retention plans for securing renewals, upsells, and expansion.

Responsibilities

- Collaborate closely with Account Director/Executive, Solutions, and leadership, as necessary to develop actionable strategic plans to secure renewals, upsells, and expansion opportunities
- Communicate with the client and their stakeholders about their goals and objectives, use cases, adoption trends, sentiment, and mining opportunities for a deeper engagement
- Forge strong relationships
- Provide overall direction and support to the customer on their business objectives and needs; while communicating best practices; analyzing results; and adapting approach and tactics, as required
- Represent the voice of the customer and their stakeholders to provide input into Evisort’s core product, marketing, and sales process

Key Metrics

Objective: Great Customer Experience

Key Result:

Key Result:

Key Result:

Objective:

Key Result:

Key Result:

Objective:

Key Result:

Objectives & Key Results Customer Success

Customer Success Manager			
Objective	Maintain our Best in Class Team (individual goals to enable a great CX)	Operational Excellence (improvements to internal or customer facing processes)	Evolve with the business (net new capabilities required)
Key Result	Agreed upon Success Plans with Confirmed Outcomes	Success Plans with customer KPIs/Goals with timeline to achieve results. Verified outcomes set as Milestones. Enterprise: Top 15 accounts Strategic: All key strategic accounts	Define role in new ABM and Boost programs
Key Result	Account data is up to date: Exec. summary; champion(s) and buyer identified; Next steps for adoption / expansion; Risks noted	Accounts are updated appropriately throughout the year and plans are clear for accounts in Yellow/Red and set with a path to green within 60 days (Key strategic accounts - 90 days)	Identify Advocates w/ marketing team
Key Result	Renewals are properly forecasted and managed throughout the process	Accurate forecasts and foreseen renewal outcomes 90% or greater forecasting accuracy	
Key Result	Expansion opportunities are identified on “growth” accounts (CSQL)	Account Health Alerts (CTAs) are set up based on document capacity and usage Enterprise: 10 CSQLs with at least 2 Closed-Won Strategic: 5 CSQLs with at least 1 Closed-Won	
Key Result Departmental	2 G2 reviews every quarter	Solicit to every “Green” Customer Document response (reluctancy or the inability to support)	

Digital Customer Success Manager (Lead)

Summary: The Digital Lead is responsible for building out the lower Enterprise customer journey & experience. This includes identifying and automating customer milestones and triggers, developing a way to forecast a large customer book and designing targeted outreach to drive Net Retention (Growth + Retention Plays). The Lead is also responsible for all customer renewal outcomes in their segment as well as expected to build pipeline and drive expansions in partnership with their AM Team.

Responsibilities

- **Monitor Health** Proactively Monitor, Engage and Nurture the Growth Segment of customers through a combination of digital touchpoints, automated customer milestones and targeted CSM/AM/Marketing Outreach
- **Automate Touchpoints** Collaboratively build the Growth Low-Touch model with Operations, Training, Support and AM teams and re-iterate where necessary based on customer feedback and sentiment
 - Automate Communication
 - Assist in building out automated Expansion Plays (Uplifts etc.)
- **Oversee Renewals** Responsible for driving and executing Renewal Outcomes for all Growth Customers through collaboration with AM Team and Digital Renewal Model (to define)
- **Manage Risk** Collaborate with Growth Teams to drive <20% At Risk Rate across the Growth Segment

Key Metrics

Objective:

Key Result:

Key Result:

Key Result:

Objective:

Key Result:

Key Result:

Key Result:

Objectives & Key Results Digital

Training Team			
Objective	Maintain our Best in Class Team (individual goals to enable a great CX)	Operational Excellence (improvements to internal or customer facing processes)	Evolve with the business (net new capabilities required)
Key Result	Academy badges on each account	Improve 1:many email capability	Communication calendar with lifecycle and events
Key Result	Webinar attendance of X% of accounts	Build Digital QBR Resource & Process	Build Digital QBR Resource & Process
Key Result	on time renewals	Tracking of health metrics: usage, logins, doc capacity...	

Position		Govern		Influence and collaborate	
<ul style="list-style-type: none"> Determine organization vision and values Define organizational goals Communicate value and expectations 		<ul style="list-style-type: none"> ✓ Develop strategies for achieving organizational goals ✓ Prioritize portfolio and focus • Build and maintain professional excellence 		<ul style="list-style-type: none"> • Build and maintain strategic relationships with partners • Build strong advocates • Develop thought leadership based on client success stories 	
Preparation Services	Implementation Services	Adoption Services	Expand Services	Renewal Services	
<ul style="list-style-type: none"> Identify Client Use Cases & Goals Build Business Case / value drivers Build Proposal Define Business Requirements Scoping Document / SOW . 	<ul style="list-style-type: none"> ✓ Project Plan ✓ Configure system ✓ Set up users ✓ Document migration ✓ Model Building ✓ Configure workflow • Quality Analysis • Doc & Data clean- up • Integration architecture 	<ul style="list-style-type: none"> • User Adoption Plan ✓ Custom Training Content ✓ Academy Courses & Help Center ✓ Support Process ✓ Product Comms / Release notes • Self-serve FAQs, training videos, webinars • KPI definition / Performance Evaluations • Continued use of ROI 	<ul style="list-style-type: none"> • Use Case Recommendations / Customer Success Plan • Client engagement plan • Client Use cases & BP sessions • EBR / QBR • New Product Webinars • Workshops to broaden use • Communication triggers / cadency by persona 	<ul style="list-style-type: none"> • Renewal Reminders • Renewal Meetings • Thank you gift/email • Request for Review • CSAT Survey 	
<ul style="list-style-type: none"> ✓ Opportunity Management (renewal, upsell) ✓ Deal Desk Approval Process ✓ Upsell/growth process / plans with AMs • Renewal Contract Types / Rules • Define growth indicators • Analyze ICP for new products • Triggers to notify of growth and upsell opportunities • Overage Opportunity Creation and routing 		<ul style="list-style-type: none"> ✓ Support CSAT • Implementation CSAT • Renewal CSAT • Contact Management Strategy / Plays • Customer Health Monitoring • 6 Sense Alerts 		<ul style="list-style-type: none"> • Identify Advocates • Reference Request Process • G2 reviews / Gartner Reviews • Analyst Reviews ✓ Case Study Creation ✓ Customer Newsletter ✓ Speak on behalf of company 	
Manage Business Performance		Manage Human Resources		Manage Partners	
<ul style="list-style-type: none"> ✓ Resource management / capacity plan ✓ Reporting on financial goals and forecast ✓ Reporting on Onboarding Status • Time Tracking • Project management • Initiatives Management • Manage change • Manage finances (T&E, 		<ul style="list-style-type: none"> • Career Ladders • Employee performance metrics • Manage talent reviews • Assess and develop skills • Manage recruitment • Succession Planning • PTO process • Awards & Recognition 		<ul style="list-style-type: none"> • Training • Support Delivery • Monitor Complex / custom implementations 	
				Manage Systems and Data	
				<ul style="list-style-type: none"> ✓ Maintain Account Data ✓ Account Status & Assignments ✓ Business Reports • Customer Health Data / Triggers • Automated communications • Support core tech solutions 	