



Investing in Customer Success

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What we'll talk about today

- What is the purpose of the Customer Success role?
- Customer Success 101: early warning signs and incident response
- Customer Success 201
- Resources

“Customer Success” job defined

The person whose job is to ensure adoption

Customer Success 101: the “firefighter” first hire

Everybody has decided that fighting customer fires is not their job. “Who can we give this to?”



Customer Success 101: finding the “Red Flag” customers



To start, measure the effects

- Usage
- Satisfaction
- Retention

Later, measure the causes

- Product issues
- Selling / targeting
- Onboarding

Customer Success 101: managing customer escalations

Define your playbooks; a team sport



Customer Success 201: three steps to getting ahead of churn

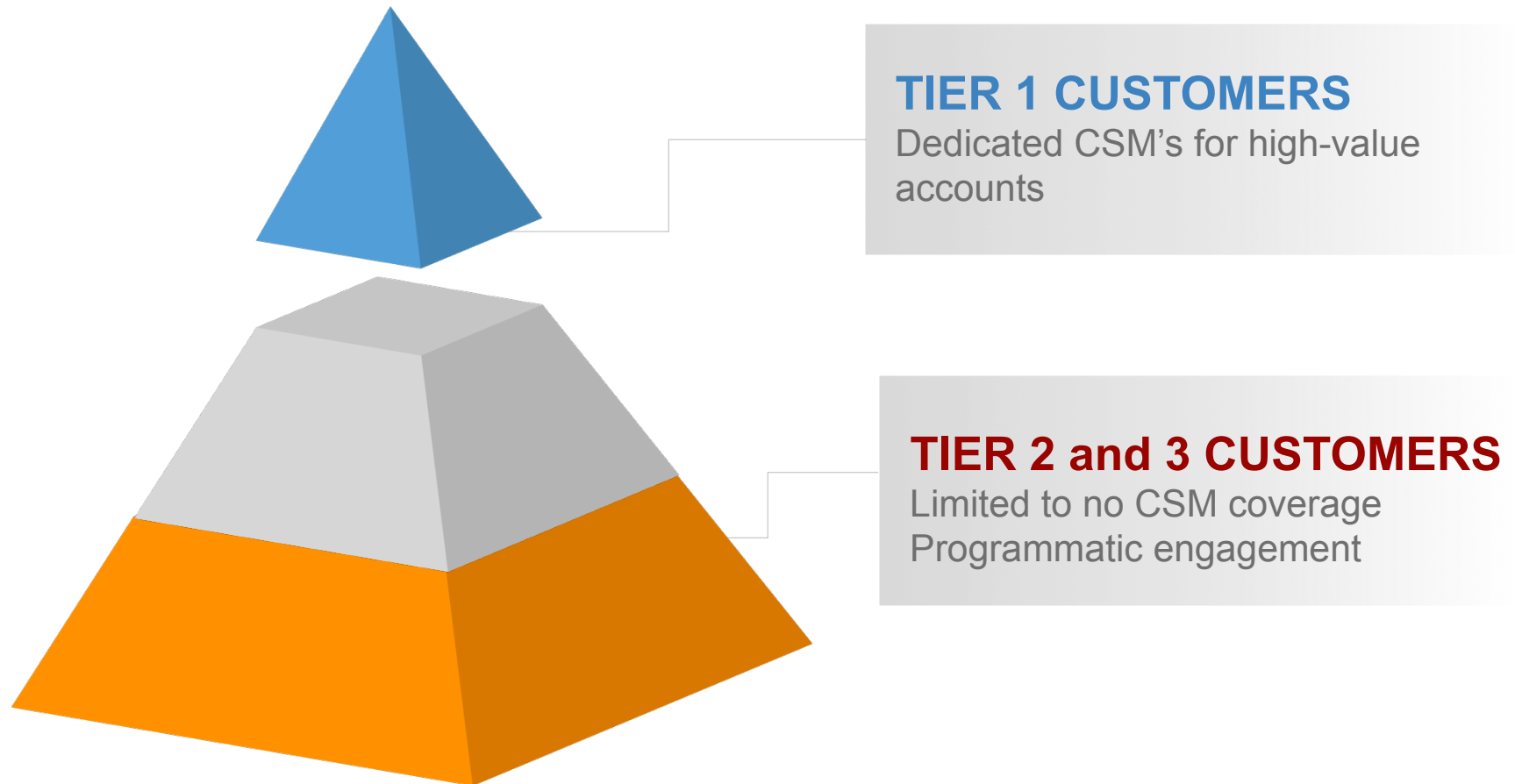


1. Master the onboarding & first-use experience
2. Listen to your signals (e.g. usage) and set threshold triggers
3. Use other events to trigger action (e.g. bad review)

Customer Success 201: clarifying team purpose



Customer Success 201: tiering your customers



The benefits of investing in Customer Success are powerful

Expand Revenue
Through Upsells



Maximize
Renewals



Better Satisfaction,
More Advocates



Boost Team
Productivity



Resources

- www.bluenose.com/resources for lots of blogs, e-books, white papers, online community
- Bloggers we love
 - Joel York
 - Tomasz Tunguz
 - David Skok
 - Nello Franco
 - OpenView Labs
- Customer Success meetup



The 11 Pillars of Customer Success

BUILDING THE FOUNDATION

1. One View of the Customer
2. Early Warning System
3. Escalations

STAYING AHEAD OF RED FLAGS

4. Onboarding
5. Training
6. Business Reviews

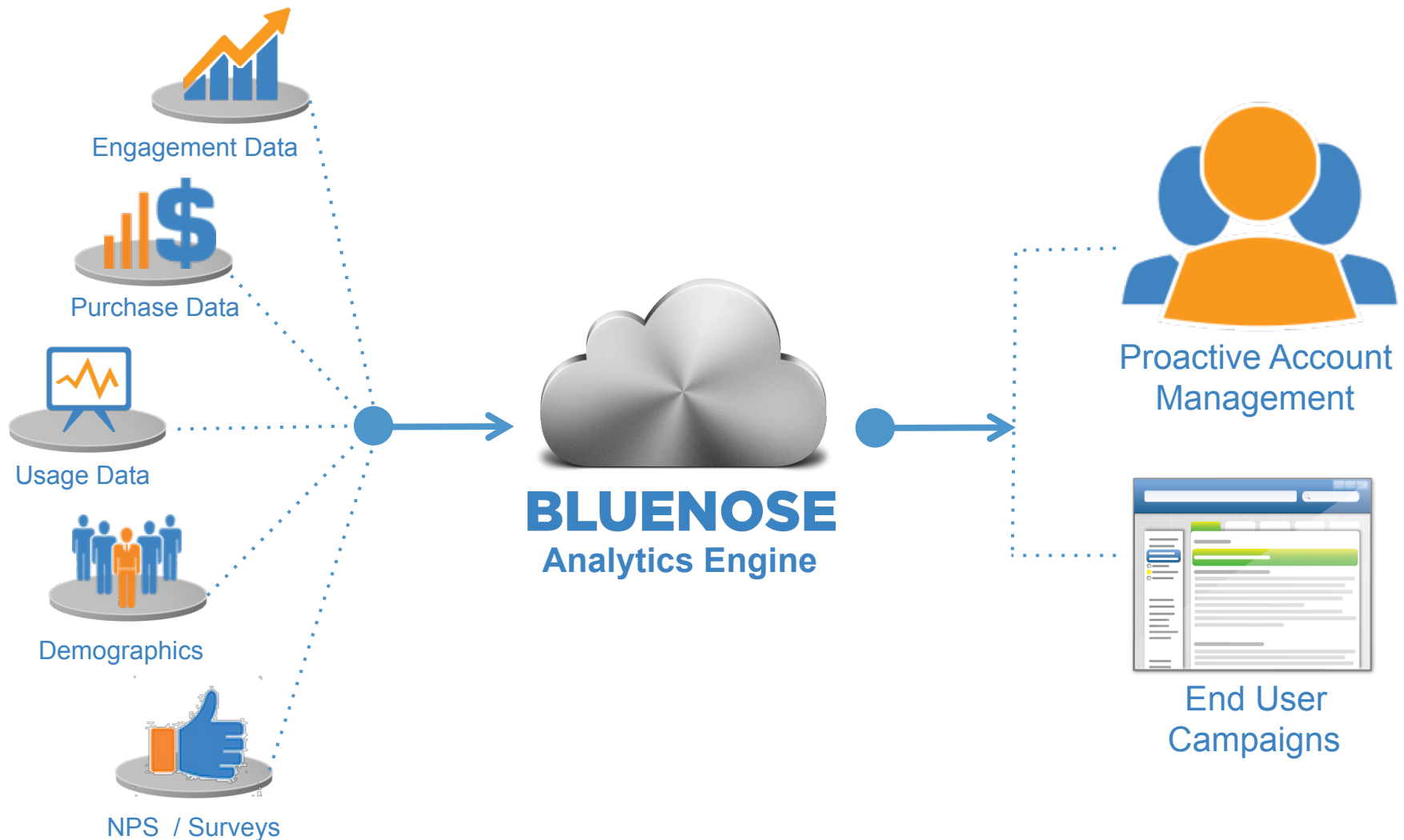
MAXIMIZING REVENUE

7. Renewals
8. Up-Sell / Cross-Sell

DEVELOPING CUSTOMERS FOR LIFE

9. Voice of the Customer
10. Customer Advocacy
11. Lifecycle Marketing

Shameless product plug: Bluenose for Proactive Customer Success



Some of our customers

