TheCustomer.Co

SaaS Customer Success Assessment

	REQUIREMENT	WHY IT MATTERS	YOUR COMPANY	KEY IMPROVEMENT ACTIONS
Financial aspects of CS				
The business case for CS	The company is clear about the financial impact of retention on profitability, cash flow and valuation.	Investments have to contribute to profitable growth.		
CS business model	CS can model its key financial and operating parameters to understand and guide planning.	Understanding the impact of changes to key operating parameters and finances improves decision making.		
Understanding customers				
Customer segments	The company has identified the characteristics and needs of the different customers it serves.	One size does not fit all. Great experiences are tailored to different customer types.		
Ideal customer profiles	Target customers are defined in detail and used across the customer lifecycle.	Companies 'buy churn' if marketing, sales and CS are not focused on the same customers.		
Causes of retention and churn	The factors that drive retention and cause churn are well understood and supported by data.	You cannot improve retention if you don't know what causes it.		
CS value proposition				
Proposition clarity	What CS delivers to customers is clearly defined.	Marketing, sales, CS and, most importantly, customers need to understand clearly the scope, boundaries and benefits of what CS delivers		
Use case proposition	The different ways the customer can gain value from the product is defined and communicated.	Addressing the customer's context directly improves adoption and retention		
Competitor Intelligence	The business understands its direct and indirect competitors and how it wins against them. Specifically, the role of CS as a competitive factor is clearly defined.	To support sales and retention, it is essential to be able to explain how the company is better than the competition.		
Customer Experience				
Delivering value	There is a reliable process to identify and deliver the outcomes the customer can achieve with our product.	Repeatedly delivering desired outcomes is the foundation of retention.		
Product	The product is easy to use with minimal training and on-boarding. The CS process is enabled in the product.	Ease of use and attractiveness are key drivers of sales and retention.		
Onboarding	There is a process that maximises initial adoption of the product and rapidly delivers against the customer's stated goals.	First impressions drive retention. Slow or ineffective initial adoption drives churn.		
Customer Journey	The company understands the issues, risks and aspirations facing buyers and customers and designs their processes accordingly.	Outside-in design underpins the ability to deliver customer value at all stages and therefore increases sales, retention and advocacy, which drive improved financial performance.		
Retention	The company has effective strategies in place to retain and grow its chosen customers.	Retention and upsell are critical drivers of profitability and company value.		
Beyond product	Resources are in place to support the development of the customer beyond the product.	Customer success almost always depends on more than your product.		
Content	Customers have access to resources that help improve product usage and business performance.			
Systems and data				
Single customer view	All data relative to a customer is available in an easily accessible, common location.	A shared view of the customer underpins the delivery of a good customer experience and significantly improves a company's analytics capability.		
Systems	CS staff are enabled by systems that guide their work.			
Integration	Systems used by marketing, sales, finance and CS are tightly linked.	A single customer view means just that; separate systems should not be a barrier to this.		
Product usage	Track in detail how different customer segments are using the product.	Usage patterns shape customer interventions for retention, cross/up-sell and messaging.		
Metrics				
Scorecard	CS has activity, quality and outcome metrics that apply at all levels of the business	What gets measured gets moved.		
Journey measures	CS has can track measures that provide insights into how well customers are moving through the customer journey.	Journey metrics help identify bottlenecks and weak spots.		
Customer feedback	The company regularly collects and acts on feedback from customers.	Understanding the customer's perspective underpins customer success.		
Retention predictor	CS can identify customers at risk.	Early warning of churn provides the opportunity to address it.		
Leadership & Culture				
Vision	There is a vision for CS that is understood and supported across the business.	If you don't know where your re going, you're lost and will fail!		
Grip	CS leaders have a deep understanding of the dynamics of CS and the wider business and act to drive growth.	The ability to abstract themselves from the day-to-day is essential in shaping CS contribution to the company's future.		
Enablement	Leaders provide the tools, information, coaching and space to enable people to do their jobs.	Even the best people will struggle without the right organisational infrastructure.		
Culture	People enjoy their work, rise to their challenges and see themselves in the future of the company.	Culture shapes significantly the effectiveness of a company.		
People				
Recruitment	There is a clear profile of a high performer for each of the roles in the team, which is the foundation of a competency based recruitment process.	Recruiting the best people is the foundation of a success team. It is always the number one priority.		
Learning and development	There is a structured process that links performance and potential to training and on-the-job coaching.	Skills underpins employee engagement and customer experience.		
Rewards	Reward and recognition reinforce the performance of individuals and teams.	Reinforcing the right behaviours and skills strengthens performance.		
Engagement	People are feel valued and supported.	Engaged employees are a pre-requisite for engaged customers.		