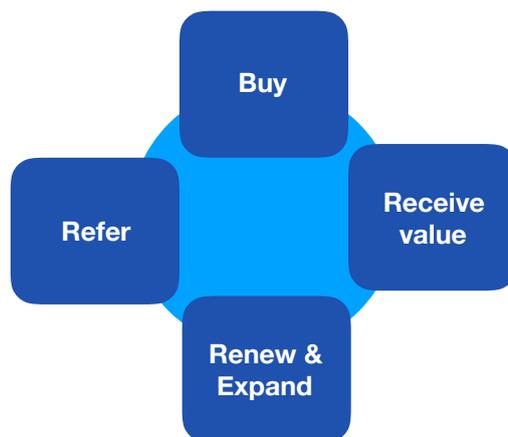


Introduction

Buyers of B2B SaaS have a reason for buying your product: an outcome, a goal they want to achieve. Identifying and delivering this outcome' achieving the value they expected (and were probably sold) underpins renewal and expansion: it is therefore a fundamental driver of growth.



In other articles and blogs, I have described how to build a process to deliver the customers' goals, which is the core of any customer success operation. In this piece, I want to explore specifically the type of organisation needed to build what many are calling 'Scale CS': shifting the balance for delivering the success process from people - CSM's to product-based and automated means. [Note I said balance: many wrongly assume I mean technology only.]

Capabilities for Scale CS

I believe there are five key capabilities for building a scale CS operation.

Define your chosen customers

Whilst a large addressable market is important, trying to sell and service them same way is often a route to failure for B2B SaaS companies, particularly in the startup and early growth stages. Focusing on tightly defined use case-based segments makes it easier to develop success plans that generate customer ROI, reduces the cost serve and aids word of mouth acquisition. An ideal customer profile should consider the customer's readiness and ability to make the changes needed to achieve their goals. It is why I think the delivery of an outline success plan is an important deliverable of the sales process. Making it clear up front what is required and how the supplier will help creates differentiation and makes the handover from sales to CS easier.

Companies with multiple products or serving multiple use cases need to follow a similar exercise for each product/use case with the additional step of considering the cross-sell opportunities. These opportunities should include triggers in success plans that strengthen the likelihood of opportunities succeeding.

Know your chosen customer better than the competition

A detailed understanding of goals, tasks, metrics and challenges for key roles in your target customer. This is the foundation of the design and implementation of any success process. Particularly important are the customers goals. I say goals (plural) because most sales will involve multiple stakeholders. Senior decision makers may recognise high-level financial or strategic

enablement goals others will be focused on operational metrics and intangible benefits. Understanding the goals of each role and how they inter-relate is the foundation for success planning.

The research should also seek to understand how you want the customer to feel at key parts of the success process. Emotions exert a powerful influence on decisions, even in the so-called logical, data driven world of business.

Build a best practice library

Resources to support the changes needed in the customer to achieve their goals. This should address best use of the product but cannot stop there. Technology alone rarely solves a problem, so you have to understand and guide the customer through the key organisational changes (processes, metrics, skills) required to achieve success. These resources will cover the needs of the different roles and whilst generic versions may be the starting point, the aim should be to develop variants specific to key customer segments; e.g. industry, sophistication or size.



Define your success plans

Each use case needs a version of the success plan. I recommend a five stage success plan:

- **Discovery:** Better understand the use case, the key stakeholders and key plans.
- **Goal-setting:** Identify the current level of performance and what is required to achieve value. As you collect this data from more companies, you can begin to be prescriptive.
- **Success planning:** Who needs to do what to achieve success, including what the customer needs to do. This begins with adoption and ends with value realisation. the cycle is then repeated.
- **Advice & guidance:** The heart of the work of customer success. What resources and interventions are needed to keep the success plan on track and achieve the goals. For scale CS, it is important to identify the data points that trigger an intervention. Whilst some of these may be time-based, it is important to deliver interventions according to the customer's context, not an arbitrary, supplier driven calendar. As I have said previously, customer journeys are often too rigid and can lead the customer down a path that is counter productive.
- **Success monitoring:** Progress towards the goal and completion of activities in the success plan.

Scale CS envisages each of the activities across the stages being enacted by data driven workflows. This is not possible without software that is both a system of record and an enactment system. Comprehensive single customer view, data-defined triggers and workflow are at the core of such systems.

Exploit multiple delivery channels

I believe the product should be the primary vehicle for delivering the success plans. This includes the delivery of contextually rich resources to support the customer and tracking progress towards the customer's goal and completion of the success plan. Some roles that are essential for achieving success may not use your product so other channels are essential. A digital first approach therefore also uses email, chatbots, communities and e-learning platforms to deliver the success plan.

Whilst the focus is digital first, personal contact will remain an important element of delivering CS at scale. A scale CS approach seeks to maximise digital delivery but always includes a human element where digital cannot be used and where personal contact is needed (and affordable) to

maintain a healthy relationship. I advise defining the success plan in digital terms first and then considering human touch overlays based on relationship maintenance and affordability.

Building a Scale CS organisation

Scale CS is different from relationship CS where people are the primary vehicle for delivering success plans. Whilst both have the same starting point - translating a deep understanding of your chosen customers into success plans, how they are delivered differs. Relationship CS focuses on people, CSM's, to aid the customer. Scale CS focuses on the development and delivery of self service resources. Whilst there are overlaps, Scale CS relies on the following five roles and skillsets.

Success plan product management. Success plans are central to a B2B SaaS value proposition. They are the vehicle that translates sales promises into the reality of customer value that underpins renewal. Product management is responsible for understanding customer needs and translating them into a product that meets those needs better than the competition. Product in this context can be features within the product, a service capability or, most likely, a combination of the two. I believe that increasingly, the success plan will be an in-app capability, making a product management approach vital. I go so far as to think that heads of customer success must have a strong product orientation and, increasingly, have a product management background.

Content management

Scale CS is heavily dependant on resources that help customers use a company's product effectively and address the organisational changes that are almost always needed if the customer is to achieve their goal. Sourcing, developing, maintaining and curating this content is therefore vital to effective scale CS. Each piece of content needs to be tagged for use case, role, plan stage and the data that triggers its deployment. Each piece of content will need to be provided for delivery across different channels.

CS technology management

Automation and data are the twin engines of scale CS: building and configuring an effective CS technology stack is therefore an important and early investment. The real work comes in building and maintaining the triggers and workflows needed to deliver the right content to the right role at the right time in the right way. This needs strong process design and data skills.

Outcomes analytics

Scale CS is a data driven capability and the most important data relates to customers achieving their outcomes. Understanding the relationship between the speed and scale of achieving outcomes and activities (both product usage and success plan actions) is the key to improving success planning. Data manipulation, analysis and machine learning are the key skills needed for this role.

Emotion and psychology

Whilst not yet a role, another area of competence scale CS will have to master is the emotional and psychological management of customers. Identifying the actions needed to drive change is a challenge but it pales into insignificance when compared with motivating people to engage and change. Building this into software is not new: social media and games designers know how to drive the dopamine cycle that keeps users coming back for more. Using psychology and emotion in a positive sense is key to helping customers achieve their goals and one CS has to get better at. I am aware of a number of successful B2B startups led by video games designers bringing this know-how to bear.

In closing

Done properly, scale CS not only delivers greater productivity, it is often a customers preferred approach. Digital first with a people overlay is fast replacing people first as the way to build customer success. I also think it will raise the bar; building the content and workflows requires a deeper understanding of customers. When people are needed to intervene with customers, as they surely will, they will work more on the human and emotional aspects of change, raising the challenge and improving job satisfaction. As with so many times through history, automation raises the bar for people.