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The Value of Customer Success Across Your Organization

eBook

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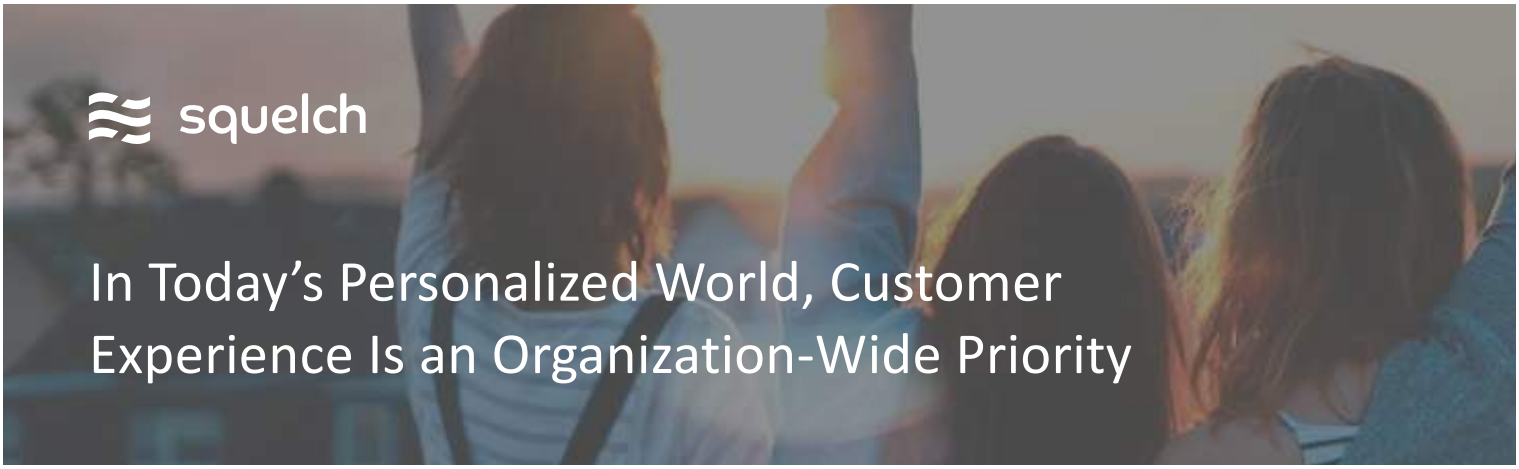


In Today's Personalized World, Customer Experience Is an Organization-Wide Priority

In today's world of hyper-personalization, customers are seeking a seamless experience when interacting with an organization. From pre-sale to renewal consideration, they expect the entire company to be committed to their success.

Starting at the beginning of the customer journey, the marketing department is tasked with understanding who the ideal buyer is and communicating the most important messages to the various target audiences.

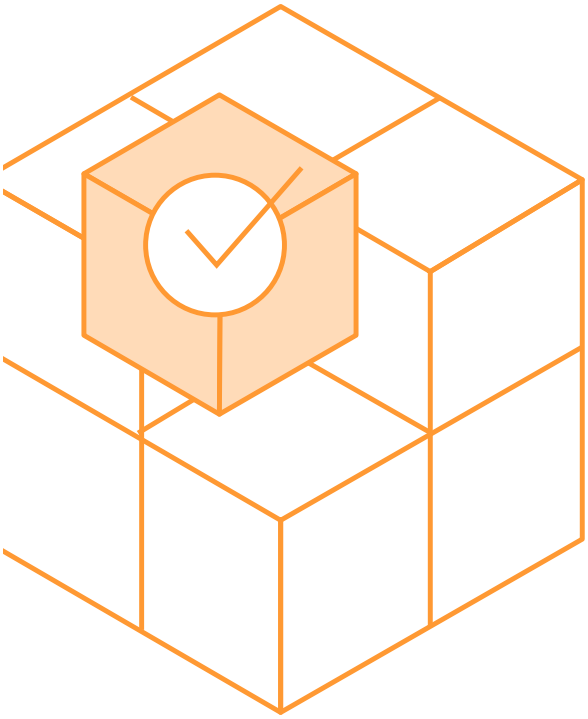
Next up is sales. Potential customers expect sales reps to customize solutions to fit their needs, thoroughly explain the product features, and convey how it will empower them to achieve their business objectives.

Once the sale is complete, the focus shifts to support and success. Customers rely on the success team to ensure they're using the product effectively based on their business model and specific goals. And when they encounter an issue, customers want assurance that support agents will understand their question or concern, offer empathy, and resolve their problem quickly and effectively.

Meeting these expectations requires an organization to follow an integrated approach to customer experience (CX). From marketing and sales to customer support and success, collaboration and information sharing is key to attracting and retaining customers in an environment where options abound and competition is fierce.

With so many options, CX becomes the true competitive advantage and should thus be a company-wide priority.

The Integral Role of Customer Success



Customer success teams are tasked with proactively reaching out to customers to ensure they're receiving the maximum value possible from a product, along with a positive experience across all of their interactions with a company.

The more that customer success managers (CSMs) can help to provide this stellar CX, the better the chances that customers will become long-term users of the product and ambassadors of the brand. In short, CSMs play an instrumental role in building a large, loyal base of users, which has a direct impact on the business's bottom line by maximizing retention and renewals.

But in order to deliver this truly customer-centric approach, the success team needs lightning-fast access to a vast array of knowledge that's typically spread across many different information systems.

Customers want to know that their business model is understood and that the success team is taking every step possible to help them reach their goals. This requires a high level of personalization in every transaction in order to respond to specific questions about previous interactions, use cases, and scenarios that a CSM may never have come across before.

Moreover, interactions with CSMs can shine a light on additional areas that require attention. A call may start out being focused on improving efficiencies in one sector and wind up raising questions about something completely different. That's why the success team needs to be ready with information at their fingertips to help customers on any and all topics at a moment's notice.

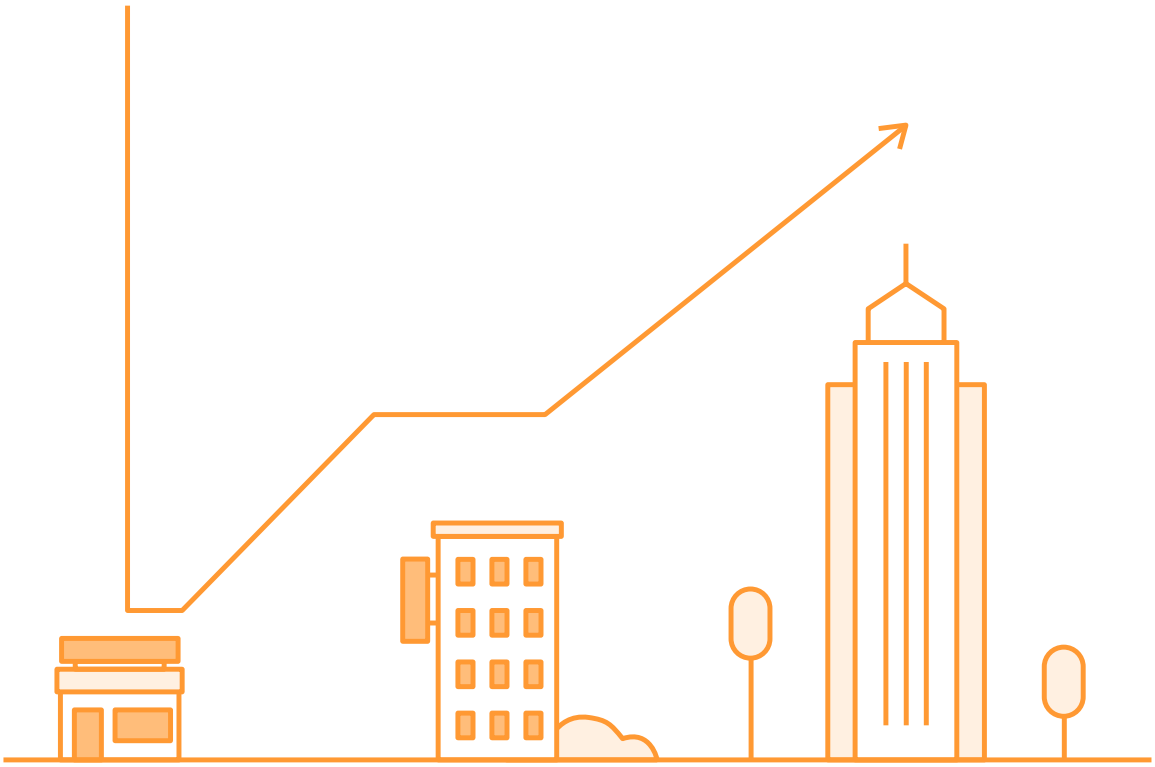
In order to achieve this feat, it's important that the success team seamlessly integrate with other departments across the organization. More often than not, they will have to wear their colleagues' hats at one time or another. After all, CSMs are part salesperson, part marketer, and part product manager, while also being a full-time relationship builder.

The Impact Customer Success Can Have on Your Organization

Success teams work directly with customers each and every day. CSMs are typically assigned to specific accounts with the goal of deepening the customer relationship and increasing the likelihood of renewals, upsells and cross-sells, and referrals.

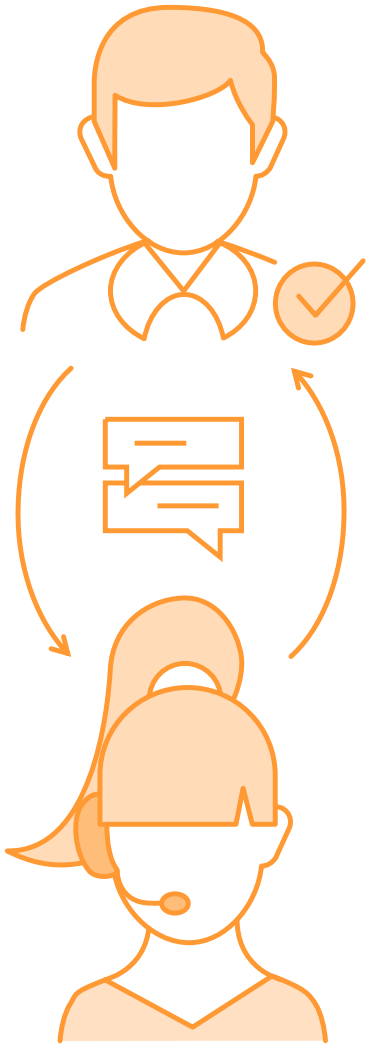
Through regular contact, the success team learns what customers like, what needs to be improved, and what additional features or new products they'd like to see in the future. The team can then combine the insights gained from individual accounts in order to identify broader trends regarding product usage and customer satisfaction.

This knowledge is vital for other departments across the organization, including customer support, sales, marketing, and product development. Let's take a closer look at each of these teams and how they can benefit from customer success.



Customer Support

Perhaps no two departments are more closely related than customer success and customer support. They both aim to provide customers with a positive experience and ensure their effective use of a product. Success tends to involve proactive outreach while support is typically more reactive. But they both sit on the front lines of customer interaction. Because of this, it's essential that the success and support teams have open lines of communication with one another.



Given the relationship-building aspect of their role, CSMs often spend more time with each customer and develop a deeper understanding of their needs and goals than support agents do. These learnings from the success team should be passed on to support as they can help turn what previously might have been a long, tedious interaction into a more efficient and accurate ticket resolution.

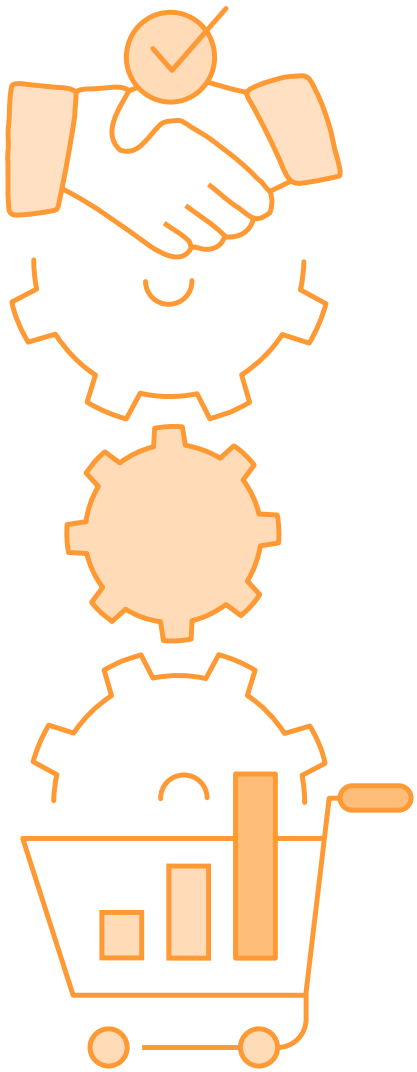
CSMs are also able to gain a clearer picture of customers' backgrounds and behaviors. By sharing this knowledge with support, the latter will be better positioned to step into the customers' shoes. This ability to offer genuine empathy is important as it is one of the leading factors of a positive customer experience.

Overall, these two departments come together to paint a holistic, 360-degree view of the customer and their product usage. While support can provide quantitative data (e.g., 12 customers called within the same week with the same issue), success is better equipped to provide the qualitative insights needed to understand the varying impacts of that issue on each customer.

The symbiotic relationship between these departments can have exponential effects on a business's success when the two are closely aligned, intelligence is shared, and team members freely and clearly communicate.

Sales

Customer Success and Your Sales Team



The success team is responsible for maintaining close relationships with customers after the sales department closes the deal.

But unlike support, which usually interacts with customers when there's a problem, the success team serves as a proactive partner to ensure customers attain the most value (and satisfaction) possible from the product, as well as from the company in general.

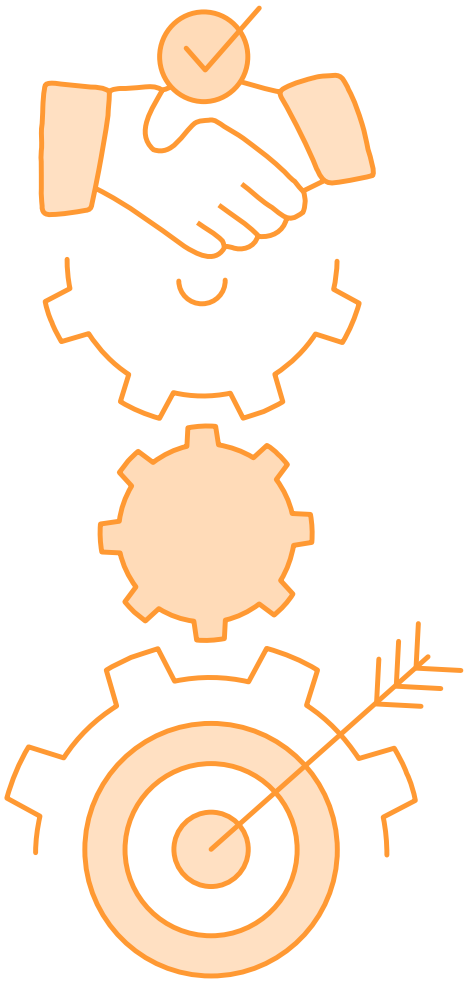
CSMs have a firm grasp of different types of customers … by size, vertical, industry, etc. They also have direct knowledge of why customers choose to walk away or, hopefully, to stick around.

With this understanding, CSMs can provide the sales team with invaluable insights — including reasons the most loyal customers are happy, aspects of the product they find most useful, and their primary pain points — to increase the likelihood of closing future deals.

The success team, in turn, relies on the sales department to bring in customers who have appropriate expectations and are a good fit for the product. This helps make the success team more effective, keeping both groups happy and productive.

Marketing

Customer Success and Your Marketing Team



As previously explained, the success team interacts with customers daily, developing deep relationships along the way. CSMs know who your customers are, why they use your products, and what features they find most beneficial.

This knowledge can prove extremely useful to the marketing department, whether in the form of previously-undiscovered use cases or extremely detailed profiles of the most profitable customers.

The success team can similarly help identify why unhappy customers are *not* finding the product to be valuable, which can help marketers narrow their target audience to eliminate those who ultimately won't be a good fit.

And it goes without saying, a good case study is one of the strongest pieces of collateral in a marketer's arsenal. Who better than CSMs to both identify and provide in-depth data about a company's most successful customers? And if the CSM has a strong relationship with the customer, they can even help make an introduction to the marketing team for further interviews or information gathering.

Finally, in sharing the insights referenced above, the success department can greatly reduce the work involved in creating buyer personas, freeing up the marketing team to tackle more creative and strategic projects.

Product

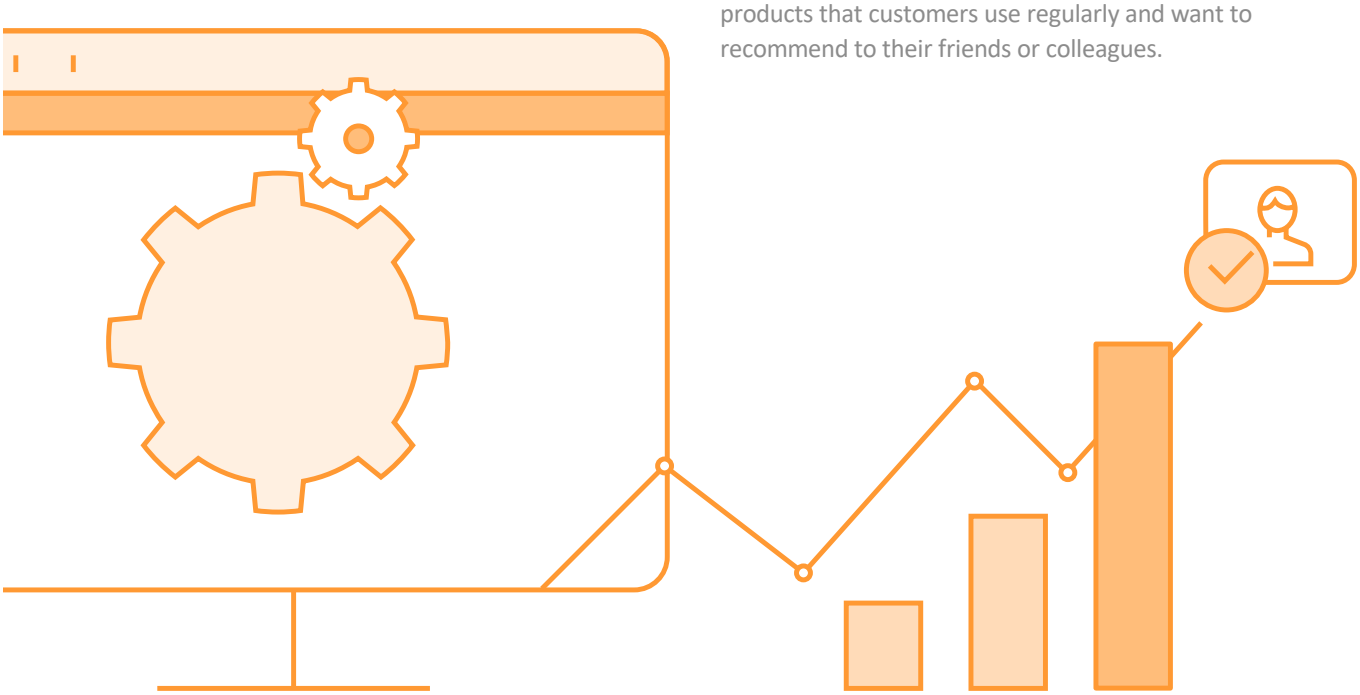
Customer Success and Your Product Team

It's practically certain that no one knows your product better than the product development team. So it's essential that they work hand-in-hand with CSMs to ensure the success team knows the ins and outs of every feature and is prepared to pass this information on to the customer.

Product managers and developers should offer hands-on training so CSMs can learn first-hand how the product operates. They should also teach the success team about common technical issues and solutions, as well as red flags to watch out for that could indicate bigger problems.

In return, CSMs can help the development team identity potential product improvements, both technical and within the user experience.

Ultimately, building a strong alignment between these two teams will result in the creation of more valuable products that customers use regularly and want to recommend to their friends or colleagues.



Achieving Company-Wide Integration

It's easy to call for alignment between internal teams, but as with most things, execution tends to be more difficult. After all, employees already have their plates full with putting out fires, meeting deadlines, taking on new projects, and more.

That's why integration must be an intentional process that's backed by key stakeholders across the organization. Unless all parties see alignment as "mission critical," the effort is unlikely to prove successful.

Here are some suggestions for aligning internal teams to better support your customers.

Share information

Silos often exist because employees in each department don't understand what other teams do or how they are structured. Share information openly and make communication a priority. Create an organizational chart that highlights the structure of each department and make sure everyone in the company has access to it.

Along with accessing the organizational chart, teams should be able to call up information across systems at a moment's notice. For instance, the customer support team should easily be able to find out whether the product development team is troubleshooting an issue or implementing a fix in real time.

Also, encourage job shadowing. Have a CSM sit with a marketer or salesperson for a few hours and watch how they work, and vice versa. Giving each group a first-hand look into what the other sees each day can help ease tension and open a productive dialogue.

Finally, send weekly updates of big wins, issues, and trends to the entire company. Examples might include problems the support or success team uncovered, how product development is managing the fix, how marketing can get the word out with a new blog post or email campaign, and what sales reps should watch out for on their next prospecting call.

Hold weekly check-ins across departments

No one wants to have more meetings. But a weekly check-in that's 30 minutes at most can help each department share pertinent information that's valuable for others to hear. This can help ensure that everyone gets (and stays) on the same page.

Select point people

Have one person from each team be responsible for communicating updates and issues to the point people from other departments. Making this the responsibility of a single person helps ensure that the information gets shared and each person brings relevant knowledge back to their team.

Set goals

Instead of setting individual goals for each department, consider what cross-team goals could be applicable in the organization. Maybe sales, support, and success have shared targets around increasing customer satisfaction or reducing churn. Maybe product development, success, and marketing have common objectives around client education. Or perhaps there are joint goals around upsells and cross-sells, with rewards for all involved.

These goals must be specific to each organization, but it's important to consider how cross-team objectives can help different departments to work together more effectively.

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How Squelch Can Help Pull Everything Together

Internal alignment is absolutely necessary to help your organization meet its business goals. Information must be communicated often and readily available at a moment's notice.

That's where Squelch comes in. The Squelch software is the customer experience optimization solution that instantly delivers the most relevant, context-rich intelligence to your front-line agents when and where they need it most.

Your customer support and success teams won't have to dig for information when answering a client question. Instead, they'll be able to rely on insights from sales, marketing, product development, and more to resolve issues, improve efficiencies, and ultimately ensure every user finds value in your product. Integration will be easier than ever, and accessing data will be lightning-fast.

AI and machine learning allow the Squelch software to learn what information really matters within a company, as well as how it all fits together. By providing this insight into how customers respond to your product, we help showcase additional value within customer-facing teams.

Want to learn more about Squelch?