

The Customer Success Mindset

Presented by

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“I want you to find a bold and innovative way to do everything exactly the same way it’s been done for 25 years.”

What is the Customer Success way of thinking

- When working on with a customer, think about what could make them more successful.
- Being proactive to help your customer instead of reactionary to issues
- It is a team effort – Build a partnership with your customer
- Sam Walton – “There is only one boss. The Customer. And he can fire everybody in the company from the Chairman on down, simply by spending his money somewhere else.”



Why care about your Customer's Success

- Financially stable customers pay better
- If companies only have a limited amount to pay – be first
- Creates honest communication about current and future risks
- Partnership relationship creates loyalty
 - Increases Sales
 - Reduces the cost of replacing that customer



It's a team effort

- How can all departments work together to create a Customer Success Mindset
 - Sales
 - Operations
 - Billing
 - Collections
 - Dispute management
 - Credit line review



What will make the difference in your Customer's Success

It is not all about extensions and credit limits

- Identify what the customer needs to be successful
- Tools
 - Policy
 - Technology
- Training
 - Scripting
 - Email examples
- Make sure your side is clean
 - Payments are applied
 - Credit Notes in progress
 - Credit limits are reviewed timely



How do you still “Collect”

- Communication is key – The earlier the better
- Identify potential challenges early
- What are your customer’s goals
- Agree what success looks like for them
- Follow up and get feedback
- Build your network with their finance team
 - Are you in any peer groups with their Collections teams



Welcome Pack – Establish an Introduction

- Align with your customers early and often
- Create expectations on terms and communication
- Discuss what you sell and how you bill
- Be honest about your billing challenges
- Provide a little training on your tools – Digital Letter, customer portal



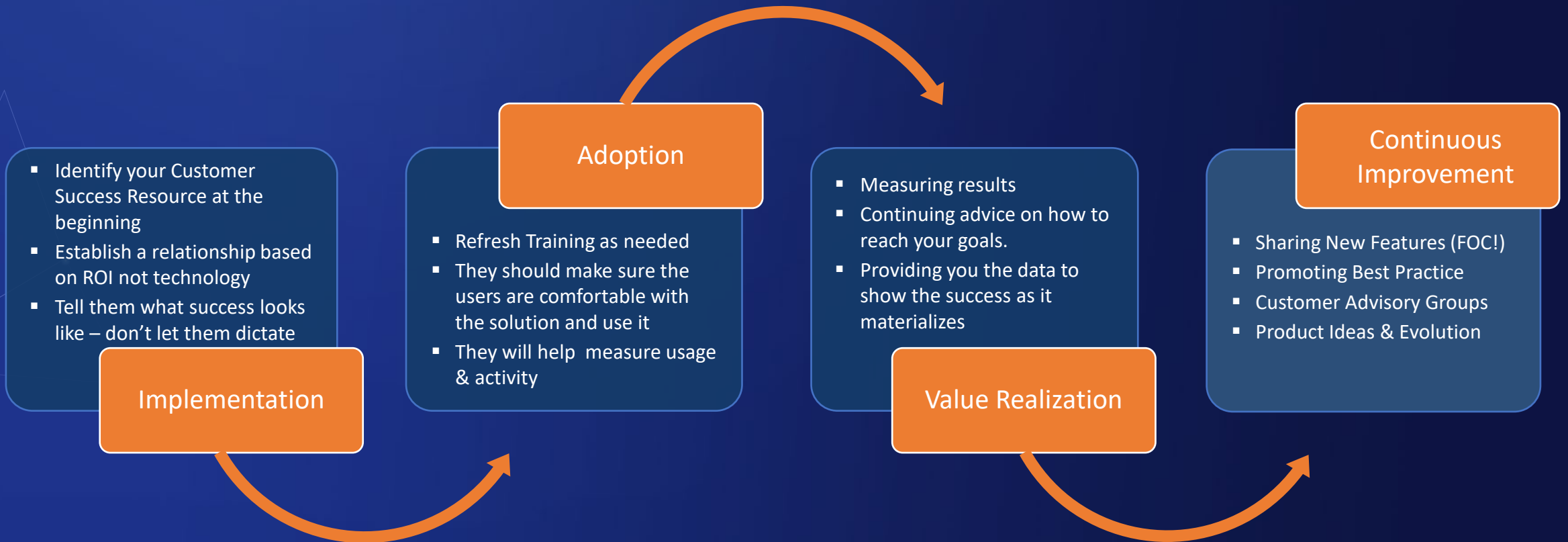
Tips for launching Customer Success Mindset

- Make sure everyone knows WHY
- Give your team the direction they need
- Identify Champions and Challengers – understand that you will likely only move neutrals to positives and negatives to neutrals
- Invest in the Positives – Actively listen to the negatives
- Investigate the neutrals – these are the objective opinions that are most often overlooked.

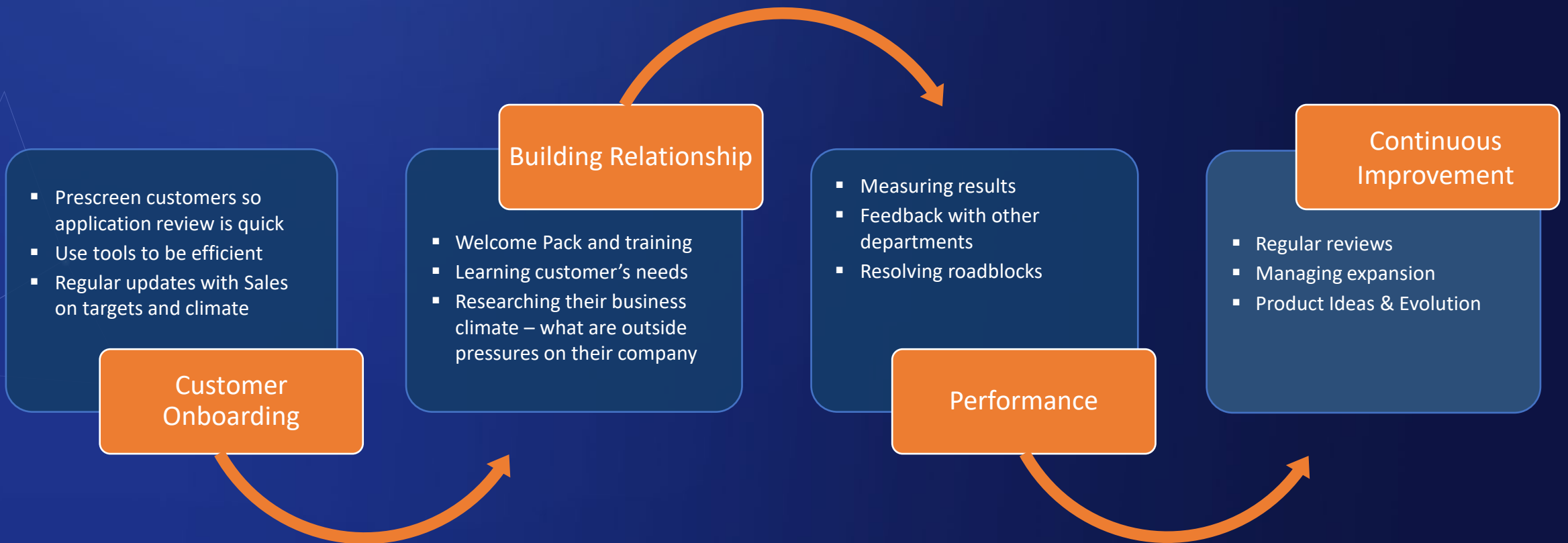


Customer Success – SAAS company's the model

Your external resource focused solely on supporting your change and outcome goals



Customer Success – Through the journey of a Customer



In summary

It will be worth it in the end...

- **Happy customers are better customers**
- **It's a team effort from the beginning to the end of the customer journey**
- **Communicate early**
- **Review at the different stages**
- **Have tools in place to absorb customer feedback**
- **“Customer Success pays the bills. Forget that at your peril”**





THANK YOU

