



Mental Health & Wellness in Customer Success



A Note From the Author

One in five Americans live with mental illness, ranging from mild to moderate to severe.

Two in five Americans experience excessive anxiety in their daily lives.

Four in five Americans experience stress at work that affects their physical health.

Customer Success can be an incredibly stressful field. As with any job, there are specific deliverables and deadlines to meet. In addition to these expectations, Customer Success professionals face the added pressure of acting as the external “face” of the company. This can compound the effects of anxiety, stress, burnout, and more.

Until recently, people rarely discussed the topics of mental health and wellness at work. Mental health days were rarely taken, and if you asked to expense the cost of a subscription to a mental health and wellness app like Calm or Talkspace, you would likely be greeted by a blank stare.

Fortunately, at many companies, this is no longer the case. As we will show in this report, organizations are becoming increasingly proactive about the mental health and wellbeing of their employees. They’re offering supplemental benefits, mandating company-wide mental health days, and training their managers on how to deal with team members who might be going through a difficult time. This is not the case across the board, however, and many companies have much farther to go in this respect.

We put together this report to highlight the ways in which the Customer Success community in particular has been affected by mental health and wellness issues, and to provide some tactical advice from industry leaders around how best to manage this in the workplace.









Some of the results of this report surprised us, and some were more along the lines of what we'd expected to see. We look forward to hearing your thoughts and feedback on this information. Furthermore, we hope this report might be used as a catalyst (pun absolutely intended) to increase buy-in for employee mental health initiatives at work, and that your team or company might implement some of the ideas shared by the leaders who have contributed to our findings.

—
Warm regards,

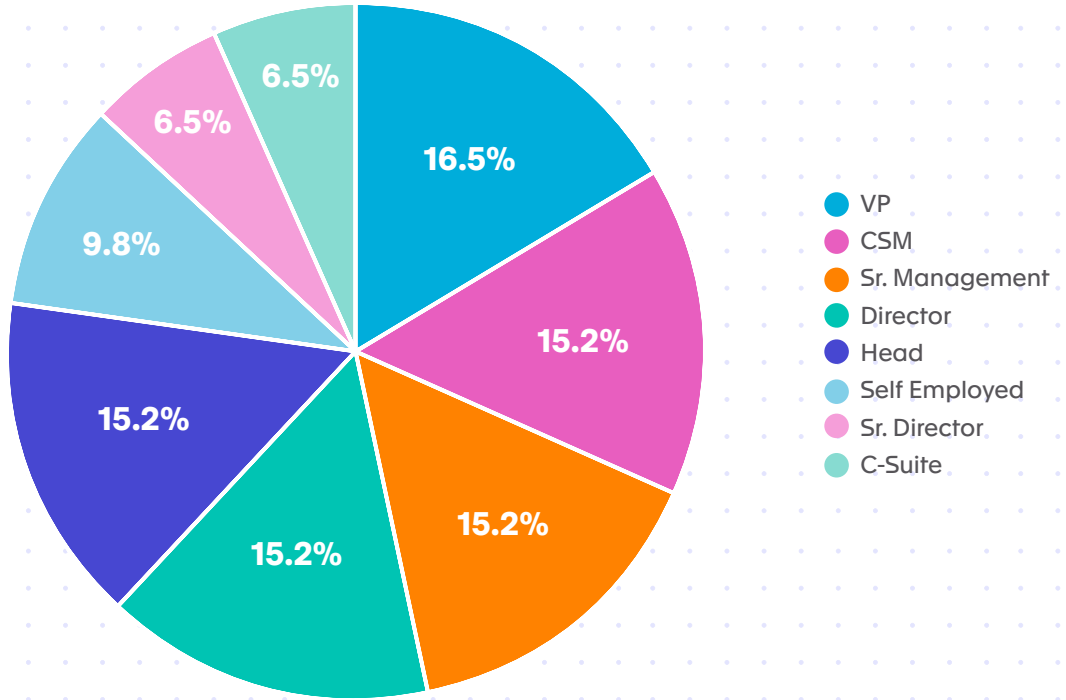
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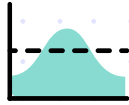
Community at Catalyst

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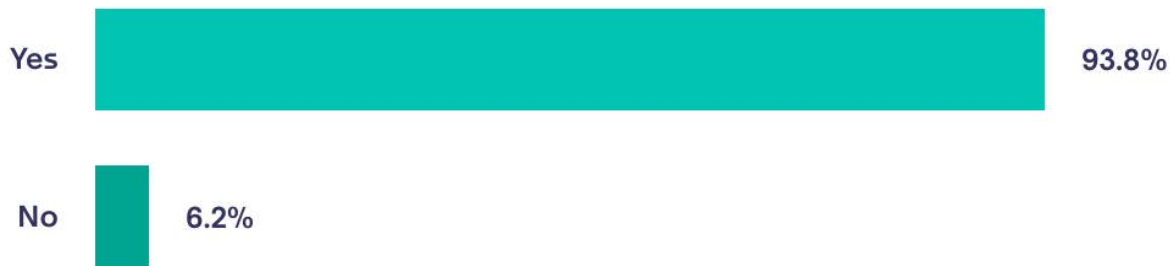




Impact of the Pandemic

QUESTION

Have you noted an increase in mental health and wellness issues or concerns among your team members since the start of the pandemic?



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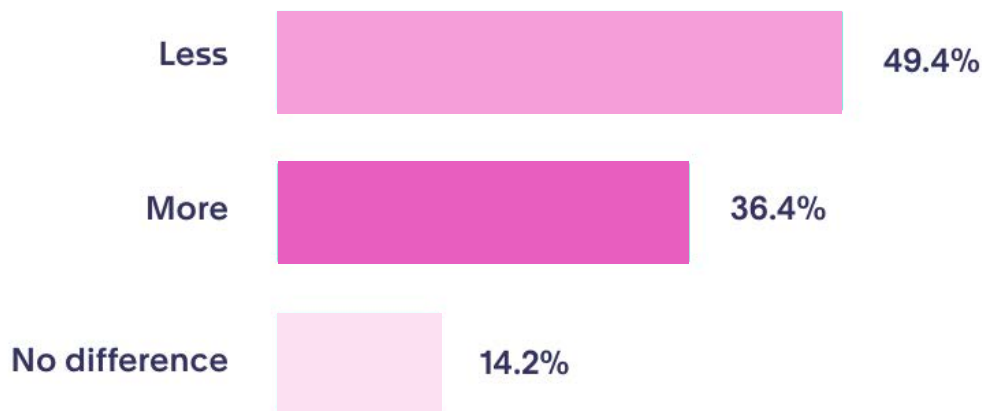
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Team Connectedness

QUESTION

Compared to last year, how connected do you feel with your team?



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What advice would you give to leaders who want to create a more connected team in this remote environment?

“To create a more connected team, you need to build a culture based on trust. To do this, you need to make sure people feel comfortable with each other. This isn’t an easy task and isn’t something you can do overnight. I start by demonstrating openness and vulnerability about my own life. I want to encourage others to feel that it’s okay to share their feelings when they are struggling. I also take time during our meetings to allow people to share something about themselves. It’s usually a fun fact. This helps everyone remember that at the core of everything, we are people. By being vulnerable and open with each other - and with my leading the way on this, I create an environment that allows people to feel comfortable sharing their feelings.”

Chad Horenfeldt

Director, Customer Success, Kustomer

“Connectedness starts with vulnerability. As a leader, you have to be transparent about how you’re feeling before you can expect others to jump in and share openly.”

Vanessa Hannay

Senior Director, Customer Success, Muck Rack

“I suggest balancing team-wide virtual social events with dedicated time set aside to discuss development and well-being. Both of

these should be separate from operational 1:1s.”

Alexander Farmer

VP Customer Success, Cognite

“Connect with each member of your team as an individual, in a 1:1 format, and then guide team sessions to facilitate their connecting with each other. Lastly, let them work together to solve daily problems, and support each other.”

Camila Bonetti

Nunes, Head of Customer Success, Feedz

“Be proactive in creating opportunities to connect with your employees to let them share voluntarily what’s on their mind. This helps them feel more connected and feel a sense of belonging, even while working remotely.”

Eran Fishov

Head of Customer Success, Verbit

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“Provide opportunities for joint projects. Use the time that we are out of the office to create teams from around the globe in order to bring different perspectives and new collaborations.”

Alistair Field
CSM, Coveo

“Double your efforts to communicate, and remember the “two ears, one mouth” model.”

Dave Jackson
CEO, TheCustomer.Co

“Put away all distractions (like Slack) during your 1:1s and be okay with allowing the first few minutes to be small talk. It’s important to not always stay in the weeds about work with your team members. Create connections within your team and with other teams! I can’t be in 15 places at once, so I’ve found it’s been really helpful to set up peer mentorships within our team. In addition, we’ve started inviting one department outside of CS to a team meeting once a month for some bonding with us. Our team has given positive feedback on this, and loves making those connections with other teams that might be easier to establish if we were working in person.”

Ann Moenius
Sr. Manager of CSM Team, Qualia

“As a leader, what I’ve noticed is that when I allow space at the beginning of the meeting for the team to connect on a personal level - either through talking about family, work, frustrations, or the hot topic of the day - our

meeting naturally evolves into a friendly and supportive dialogue.”

Davita Strong
Customer Success Operations Manager, Branch Metrics

“Be vulnerable. Share with your team some details about your personal and professional life and ask about theirs. Show empathy and encourage people to prioritize important aspects of their personal life as much as important work challenges. Support them by allowing the flexibility they need to make time for both.”

Celia Gouveia
Director, Customer Success Strategy & Operations, Glint, LinkedIn

“Create a safe space for employees to talk, vent any frustrations they may have with work, or life events outside of work, and ensure that “Vegas Rules” apply. I feel people are sometimes cautious in sharing how they really feel when things aren’t great. I also think it helps people feel connected when they know there is a forum for them to be heard, and when they believe that their input might actually drive positive changes. It’s critical that everyone feels that what they share in confidence will be kept in confidence.”

Clayton Courtney
Customer Success Manager, Predictive Index

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“Leaders need to connect with their teams on a human level. Team stand-ups and meetings can be a good way to keep in touch, but having social events (a reading club, etc.) can be equally beneficial in keeping people motivated.”

Nathan Dunleavy

Sr. Customer Success Manager, 1Password

“Since we are working remotely, many subtle shifts can flag a problem with a team member. Changes in the frequency of replies through Slack, sentences that go from long to short (or vice-versa) in team communications, an obvious lack of topics in 1:1s, or even moving the conversation in an unusual direction can indicate that something is amiss. Even though it is not our responsibility to dive into their personal life, just sharing that we have noticed a change and showing understanding and empathy, can make the person on the other side feel better.”

Anita Gazica

Head of Customer Success, Mediatoolkit

“I have found success by reaching out to various team members, just checking in on them outside of work-related items. “How are you?” Or “Have you had time to get away from your desk today?” I’ve also hosted virtual happy hours, and sent care packages to each member to give all of us something to experience together while we can’t actually be together.”

Sara Bochino

Sr. Director, Global Customer Success, Integrate

“Lead by example in creatively engaging your team on non-work-related topics. Build and incorporate metrics on engagement and mental health into manager performance measurement. Inspect what you expect.”

Rachael Starke

Global Head of Customer Enablement, Amplitude

“Showing that you genuinely care about your team can help you build the trust you need to discuss mental health openly. In addition, showing that you are vulnerable as well can give your team members the green light to express themselves when they are having mental health challenges. I have been open with my team when I’ve had a tough day or week and I feel that this gives them a level of comfort in expressing similar feelings.”

Emily Campos

Manager of Customer Success, RevenueWell

“Make space! The best thing we’ve done with our Success team is to make space to share our celebrations and our struggles. We dedicate meeting time to support each other, share our struggles, vent productively, and care for each other as humans.”

Amanda Ingraham

Director of Customer Success, 15Five

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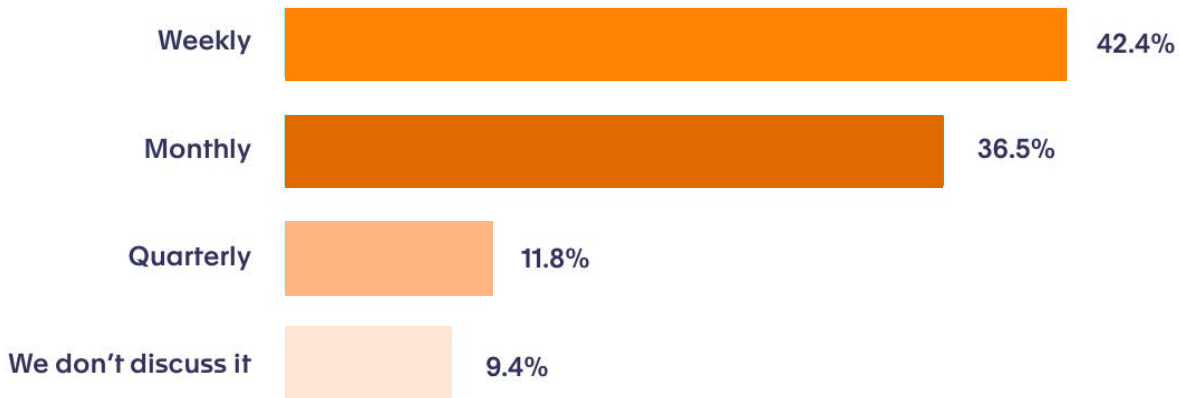
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Being Proactive on Mental Health

QUESTION

How often do you proactively speak with your team about mental health and well-being?



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What is your best advice for leaders who wish to proactively address mental health and wellness with their teams and companies?

“Talking openly about your own challenges or your experiences with friends and family can go a long way in helping people feel safe discussing these topics. (Of course, you want to share in a way that respects the privacy of your friend or family member). Additionally, it can help if you relate an experience you may have had when you made a mistake and spoke about mental health in an unsupportive way, maybe even causing harm unintentionally. Sharing stories about times when we, as leaders, made mistakes and learned from them can help our team members see the value in stepping outside their comfort zone and taking this risk.”

Sarah Bierenbaum

Founder, Sarah B Consulting

“Acknowledge that many people face mental health and wellness challenges, and this is not something that should be hidden. Encourage people to find someone to talk to, and recommend resources such as employee assistance programs and support organizations in the community.

Leaders who practice mental health awareness themselves give confidence to team members to do the same.”

Bridget Lamb

Director, Customer Success, MobileSmith Health

“Be vulnerable and compassionate - share a story of your own. We’re all human and imperfect, so let your team really see you. Show up authentically and be the example. Encourage them to reach out if they need help, and offer to support them in any way you can.”

Shari Srebnick

Head of Customer Success - US, Searchmetrics

“Have an open meeting about this topic and make sure employees feel safe bringing up concerns about health and wellness. Better yet, bring in an expert to present on ways to take care of mental health.”

Kim Oslob

Sr. Director, Customer Engagement, MeasuringU

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"It's very important to study the subject before trying to help someone, otherwise you could end up having the exact opposite effect. Most people don't understand that mental health issues are real and that some of them might require professional intervention. Mental health professionals, bosses, family, and friends may all have a role in the recovery process."

Lilian Oliveira Franco

Head of Customer Success & Care, Wirecard

"Try to understand which company benefits may already be available to your employees. Make sure your team knows that you will help them access the resources they may need (HR, leadership, etc.) at any time."

Brian Hartley

Senior Director, Customer Success, RFP360

"Be vulnerable yourself first and your team will open up to you. When you are honest about how you're feeling and about the ways in which you're facing your own challenges around mental health, it will make them more comfortable opening up to you. I also believe that anyone in a leadership role should be in therapy. This helps you better understand yourself - an incredibly important element in leading your team with empathy and compassion."

Jeffrey Nadeau

VP of Customer Success, Wibbitz

"Give your team permission to show vulnerability by demonstrating it yourself. Create a psychologically safe environment so that vulnerability is celebrated, not demonized. Know your people and observe any changes

in their personas, while always being open to listening if they share. Ensure they are taking time for themselves and making time to connect with people who are important to them outside of work. If an issue with a team member seems serious, offer up internal resources they can access for help. Remember, leaders aren't doctors and shouldn't overstep, but can certainly offer advice from a place of empathy and support."

Parker Chase-Corwin

Senior Director of Customer Success and Support, Paytronix

"I think consistency is key. One-on-ones are the time when you have the best opportunity to dig into the tough stuff with your team. In that setting, I think it's important to consistently show that you're open to talking about these topics. Every conversation provides a chance to litmus test team members' wellness with questions like, "How is that impacting you?", "What's weighing on you the most this week?", etc. By regularly asking these questions, you normalize conversations about mental health and wellness and create space and hopefully psychological safety for your team to speak openly at times when they need support."

Christina Rosivack

Manager, Customer Success, Feedback Loop

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“First, seek advice and a little education on how best to engage with your team on mental health issues. Talk to your HR department, do some independent research, or reach out to peers. Second, be respectful of your team members. Just because you want to talk about a difficult topic doesn’t mean they feel okay about this. Ask if they’re comfortable talking with you about it first. Make sure they know the conversation will be held in confidence unless they give permission for you to share (i.e., with an HR person or mental health professional). Never betray a team member’s confidence, as you’ll never get it back.”

David Ellin

Chief Customer Officer, Centric Leadership Strategies

“I speak with a lot of people regularly - on my weekly coaching calls, and during our popular monthly interactive webinar series. I always end my calls by reminding participants to take time out every day to work on and center themselves. Whether it’s a walk around the block, time sitting in the backyard listening to some music and soaking up the sun, a good workout or meditation...they need to do whatever it takes. It’s important to MAKE that time available to recharge. Customer Success can be a draining job - both emotionally and mentally. It’s important for each of us to take care of our emotional and mental health daily in order to bring support and care to the people who are important to us at home, along with our customers and colleagues.”

Andrew Marks

Co-Founder and COO, SuccessHACKER

“Highlight mental health and wellness as a key priority for your organization and develop a plan that includes daily, weekly, and monthly activities to support it.”

Ed Valente

Head of Customer Success, Sales Solutions, Toronto, LinkedIn

“Listen to your team in the same way that you expect them to actively listen to customers. Work with your HR and/or finance leadership to do some research so that you’re prepared with ideas and budget. I’ve found these teams to be supportive as we have similar overall goals. Open a dialogue and start with some reading or listening. Encourage the sharing of stories to open the door.”

Katrina Coakley

Director, Customer Success, Talent Reef

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“Take the time to really listen to what your team is dealing with, and ask often if there’s anything you can do for them. Create a safe space at work for team members to be their authentic selves, and to be vulnerable and open. As a leader, I have, on a few occasions, mentioned to team members that I had to go because I had therapy. I said this in the same manner that I would have if I had been saying “It’s sunny outside.” Finally, normalize “checking in.” During your regular (preferably weekly) check-ins, ask your team members how they are doing. Listen. Care. And support them genuinely.”

Krista Roberts

Customer Success Manager, IntelliShift

“Ask people if they and their loved ones are okay, if they are taking breaks, going for walks, moving away from their desks, etc. I don’t think you need an agenda - you can ask what the last book they read was, or who their favourite band is. The more we come across as humans looking out for each other, the easier it becomes for someone who is feeling fragile to reach out.”

Patricia Awan

CSM, ITGL

“I encourage leaders to make the topic of mental health an active conversation. Help people feel comfortable talking about mental health struggles, and have a support structure in place so that they feel safe to discuss their difficulties. I try to be transparent with my team and express my own struggles when they arise. I strongly encourage the team to take time off

and I provide a backup for them to ensure they truly disconnect and recover. It is important to acknowledge the increased work hours, responsibility, and planning the team is taking on. Many folks on my team must balance children’s remote school, spouses fighting for bandwidth, and pets wanting to play. Keep focused on outcomes, increase your trust, and let your team know you’re thinking about them and are always there to help.”

Ronald Schnackenberg

Head of Customer Success, Agari Data

“Look for uncharacteristic changes in behavior or an uptick in mistakes. Announce catch-ups to the team to avoid any individual’s feeling the anxiety of being singled out. Show genuine empathy and desire to understand how they feel, and identify common ground. Ask questions to understand (without judgment) any potential triggers that may impact their health and well-being, such as last-minute deadline changes.”

Craig Jackson

Head of Customer Success, The Accountancy Cloud

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“Check in on your staff’s mental health and wellness frequently - during 1:1s, you can have it come up naturally. A lot of people just need to vent a little these days, and being empathetic, while also giving guidance for work-related problems, goes a long way.”

Samantha Dixon

Customer Success Manager, HiMama

“Mental health should not be a taboo topic with your team. For me, it’s about ensuring your people feel comfortable prioritizing their work/life balance. Make your interactions a safe space for people to express how they are feeling, and if you are hearing signs of burnout, this is a great opportunity to proactively suggest that person take a mental health break.”

Ben Rosenberg

VP of Sender Experience, Sendoso

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Responsibilities of Managers

QUESTION

Do you believe that as a manager, you have a responsibility to intervene or talk to a team member who is experiencing mental health issues?



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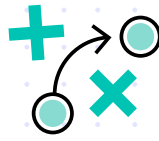
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Formal Training

QUESTION

Have you ever had formal training on how to intervene or talk to a team member who is experiencing mental health issues?



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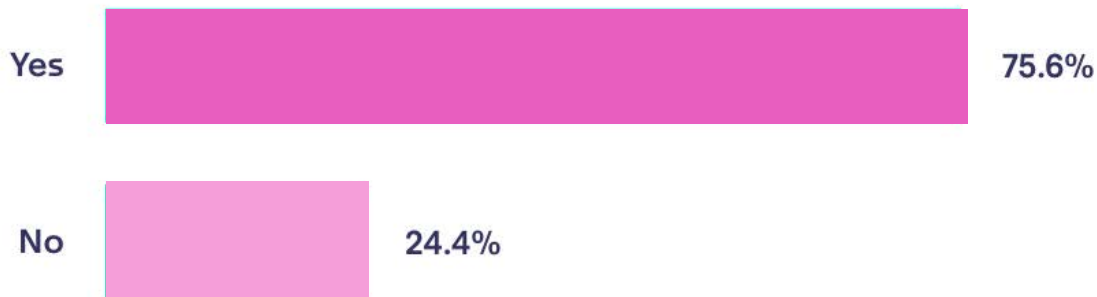
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Comfort Being Open at Work

QUESTION

As a leader in your company, would you feel comfortable going to your boss if you were experiencing mental health issues at work?



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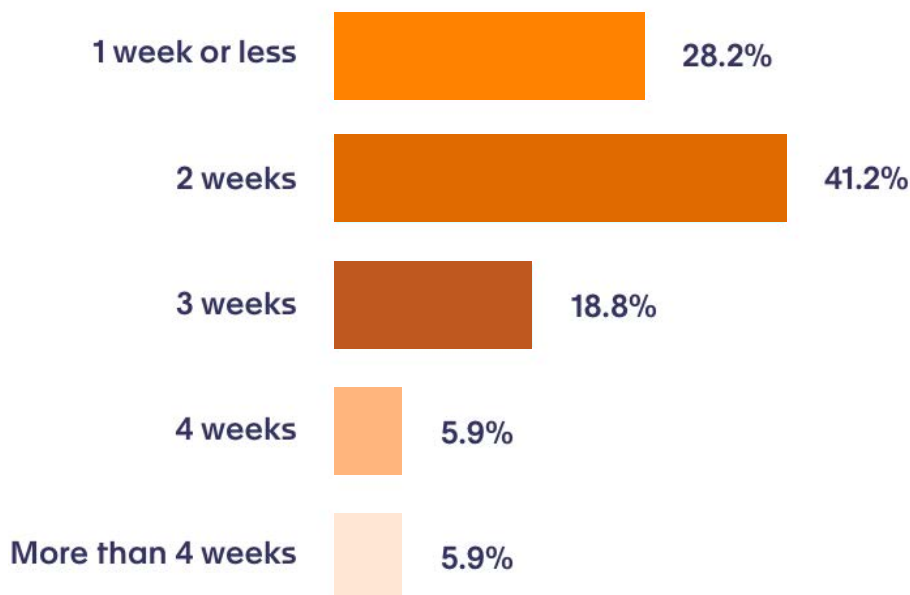
PTO in 2020 vs. 2019

QUESTION

About how much PTO have you taken in 2020 (not related to physical illness)?

WEIGHTED AVERAGE:

2 Weeks



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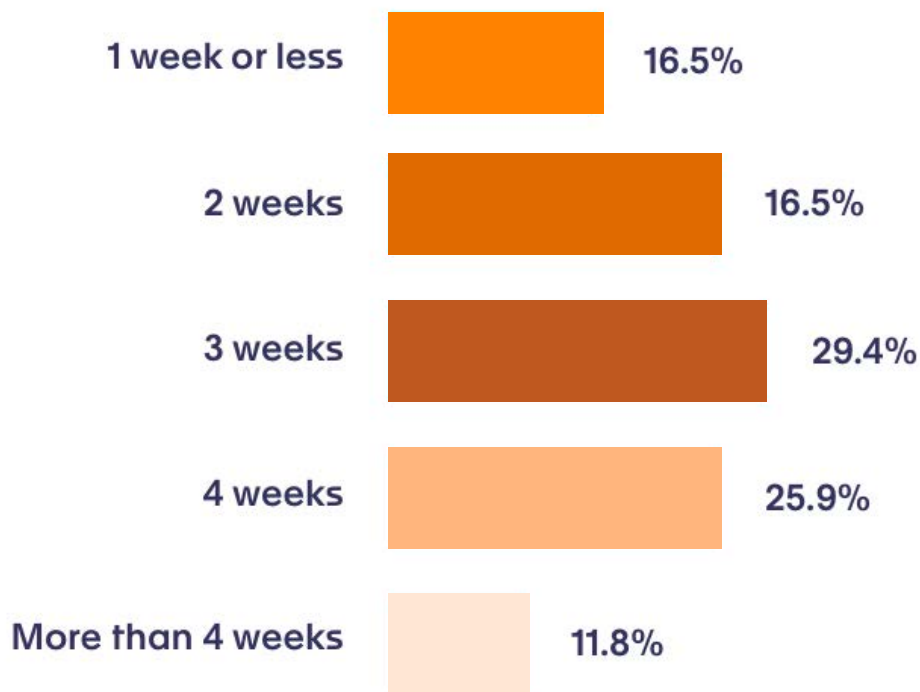
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QUESTION

*About how much PTO did you take in 2019
(not related to illness)?*

WEIGHTED AVERAGE:

3 Weeks



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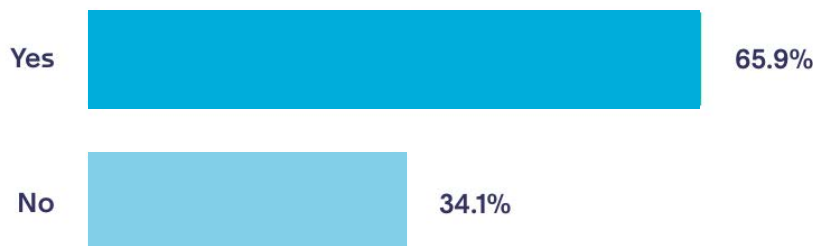
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Taking PTO for Mental Health

QUESTION

Are you comfortable taking a day off to tend to your mental health?



QUESTION

Are you comfortable telling colleagues you've taken (or are taking) time off due to mental health and wellness concerns?



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How can leaders make sure their team members feel safe and comfortable coming to them with their mental health concerns?

“Make time to create psychological safety. At Heap, we ran focus groups to better understand what behaviors encourage or discourage psychological safety. This initiative really helped employees feel more comfortable going to their first-line managers about mental health concerns.”

Veronica Dasovich

Senior Director, Customer Success, Heap

“Demonstrate that you’re not putting a team member on the “flight risk” list if they tell you they are unhappy, overworked, struggling, etc. Take care of things for them - don’t just give suggestions and make them do the things you recommend. This just adds to their maxed-out to-do list. Give them real time off, making sure they don’t return to a mountain of work. Team members will feel safe if they see that there is a safe space and that leaders have taken action and can back up their actions.”

Alicia Brandon

Manager, Customer Success, Brandwatch

“Be vulnerable about your journey too. People use communication from the C Suite as the model for what’s appropriate to share at work.”

Alex Thebert

Customer Success Manager - Onboarding, atSpoke

“Speak about the topic to know they are safe and it is okay. Check in with them often (weekly), give tips regularly - taking breaks, walks, etc.”

Leyla Bambury

Manager, Customer Success, Hootsuite

“Provide anonymous ways of communicating with leaders. Not every team member will feel safe immediately opening up about their challenges. Offering the option to make this communication anonymous can provide the psychological safety to open up and share what’s bothering them.”

Brian LaFaille

Director, CS Programs, Google

“Have an open conversation about it. If necessary, have HR act as a guide on how to create that open communication on mental health.”

Kim Oslob

Sr. Director, Customer Engagement, MeasuringU

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“Remind your team that their contributions are more than just an NPS or CSAT score from their clients. They contribute by sharing when there are challenges that need to be addressed, whether that is a client’s challenge or something that they are dealing with personally. They need to feel that you and your organization are there to support them.”

Devon Lee

Sr. Manager, Client Success, Built Technologies

“Be vulnerable in sharing your own mental health struggles so that others feel comfortable sharing theirs as well.”

Matt Kwan

Manager, Customer Success, Riipen

“Lead by example. If you’re willing to share, people will feel more compelled to reciprocate. If they aren’t comfortable with you, that’s okay too! Sometimes peer support can also be very effective, as long as the person in the listening role has the bandwidth to take that on.”

Kelly McGillis

Academic Client Success Associate, Riipen

“If you want your team to engage, you have to go first. Be honest, vulnerable, and share how you’re taking care of your own mental health and wellness. It’ll help to create a safe space to talk about it and for everyone to understand that it’s okay to not be okay.”

Junan Pang

Senior Manager, Customer Success, Slack

“Be clear that mental health concerns are important to you and that you care about their well-being. Be open to discussions and let them know it - more than once. Then create the right 1:1 forum for those discussions to happen.”

Mike Egan

VP of Customer Success, BenchSci

“Speak about mental health in team-wide venues so that individual team members don’t feel singled out, and share information and resources to normalize the topic of mental health and well-being. Create an environment where people feel safe and know that it’s okay to discuss mental health concerns. Publicly acknowledge the importance of investing in your mental health and regularly share ways this can be achieved - in Slack, for example. Time off, holidays, exercise, and so on. Share articles, tips, and provide spaces where people can talk and seek out help if needed. This is more important now than ever, as many folks no longer have that face-to-face interaction, and need to have those safety lines available to them.”

Anonymous

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“Create time for check-ins and ensure that you are leading by example. I recently sent a note to my team which covered operational items, while also highlighting the challenges that we were having as a family with homeschooling. This created the opportunity for a dialogue and I received numerous replies and follow-ups from team members with advice, sharing their own concerns, etc. I was able to follow up with each and help connect people to the right resources for them.”

Dan Hayward

Head of Customer Success, Americas, LinkedIn

“First, leaders need to equip themselves with the education, training, and knowledge they need. It is vital to understand the signs of mental health disorders as well as what to say and do to meet the needs of their employees. Then, ensure all employees hear the message of the commitment of the organization (tone from the top). Finally, leaders should ensure they are checking in - not just passively waiting for employees to come to them. Communicate with your team.”

Kelly Dziedzic

Freelance Customer Success Advisor

“To me this is more than just an “initiative,” and more about the everyday culture you build within your team. Lots of companies have policies and other things that say it’s okay to talk about mental health or other subjects, but the feeling within the team isn’t there. My best piece of advice is that if you want your team to be comfortable, you have to break

down that barrier and create an environment where your team members feel “seen” as people, and not just as employees. If they feel “seen,” they will more likely feel safe coming to you about mental health concerns.”

John Papale

Customer Success Manager, Zappi

“Lead by example! Don’t be afraid to share how you are handling or struggling with a situation. Be vulnerable and real through your actions and by expressing that the space is a safe one. Also, actively listen to them without trying to “fix” problems that they express.”

Star Hofer

VP of Customer Success, PartnerStack

“The most critical things are making sure you, as the leader, are taking the time to be available for them and that you are listening. It’s easy to get wrapped up in your responsibilities and a busy schedule, so just reiterating that you are there for them and there to listen is a must. Something I ask my team is, “Do you need me to listen, give advice, or intervene?”

Haley Hess

Director of Client Success, HousingWire

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“Bring it up in 1:1s with every team member - even those who haven’t given any indication that they’re struggling. With so much upheaval this year, you have an easy opening for bringing this up. I like to stress my personal commitment as a leader (“It’s important to me, personally, that everyone feels supported here.”), and I stress that I’m there as a resource if they ever want to connect about problems.”

Jamie Wernet

Director, Customer Success, Greenhouse Software

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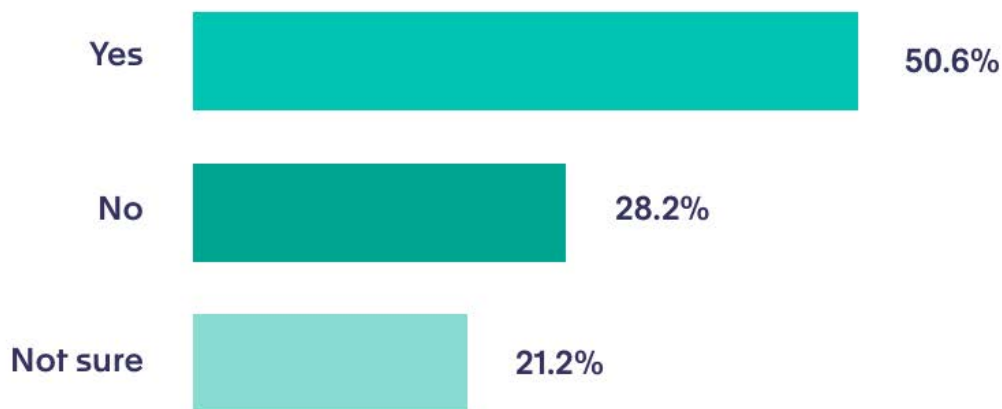
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Supplemental Company Benefits

QUESTION

Does your company offer any supplemental benefits for mental health - beyond health insurance?



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What are some of the benefits they offer?



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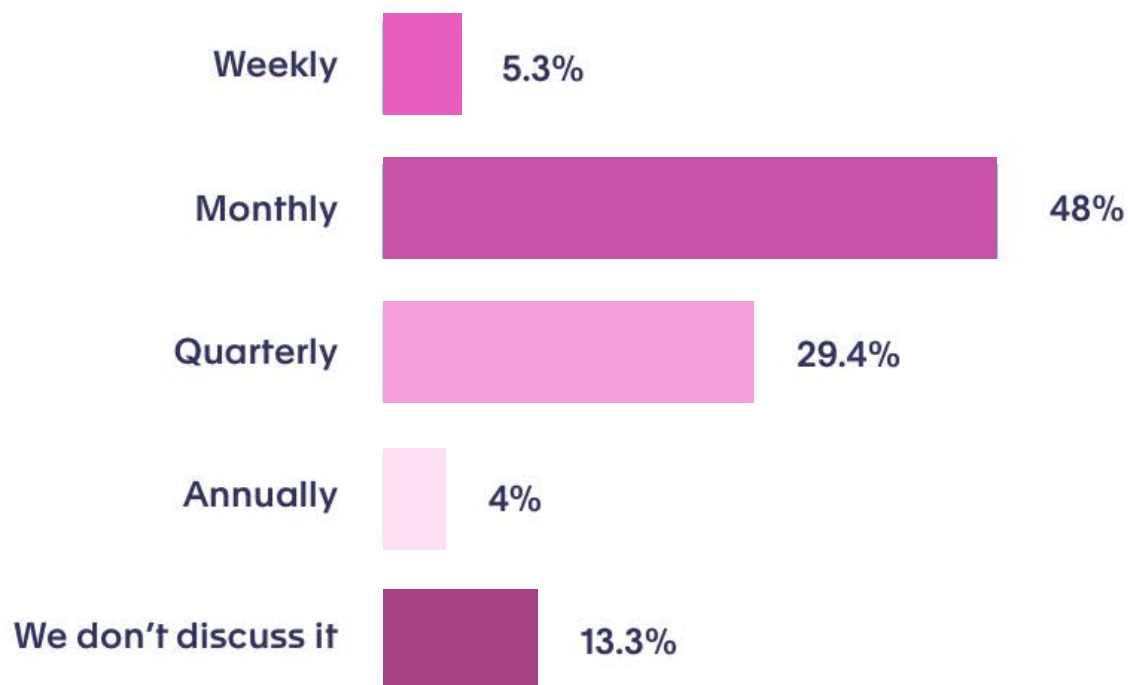
Employee Mental Health as a Company Priority



Employee Mental Health as a Company Priority

QUESTION

How frequently does your company leadership discuss employee mental health and wellness?



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How can leaders make sure their team members feel safe and comfortable coming to them with their mental health concerns?

“Mental health impacts everything, including the bottom line. Mental health can impact productivity, morale, and employee retention. It’s really simple if you think of it that way. Investing in mental health initiatives is actually an investment in team productivity, morale, and retention, which can decrease the overall costs of recruiting. I’ve always been quoted as saying, “Happy team members = happy customers,” and that is one of the strongest churn fighters out there.”

Maranda Dziekonski

Vice President Customer Success & People Ops, Swiftly

“The company needs to invest in meaningful resources for employees, training for managers, and clear access and insights into personal days or mental health days. If there are no tactical ways the organization is investing in mental health and wellness, the employees can tell the investment isn’t there. If these issues are not currently considered a priority for the business, look for small wins you can achieve yourself, or talk to folks at other companies and see what’s working within their organizations.”

Sara Masson

Director of Customer Success, Loopio

“For this to truly work at an exec level, it has to start at the top, with the CEO leading by example, and every exec consistently providing the same support for their team.”

Adam Houghton

Vice President Customer Success, Klue

“Mental health and wellness are aspects of accessibility, in the disability sense. It’s critical to provide robust healthcare plans, wellness stipends, or flexible work options (eg., remote, 4-day weeks, non-standard hours) - whatever works within your organization. Above all, it’s important to create a culture that values wellness. This means actively discouraging overwork - or a permanent sense of crunch time. It also means encouraging and normalizing the existence of priorities outside of work, and not punishing employees (explicitly or implicitly) who do not work overtime, or who stick to their family commitments. Having alcohol-free work events can also be helpful for inclusion.”

Lani Mohan

Customer Success- Data Analyst, Sounding Board

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"It's important to start a conversation on the topic. Having small town hall-style meetings with teams and departments opens up a direct line of communication with leaders that teams wouldn't otherwise have access to."

Yanira Sesniak

Vice President of Customer Success, IngeniousIO

"Share experiences from the top down without being afraid to speak up and talk about the ways mental health affects each and every one of us."

Will Pagden

Head of Customer Success, Webeo

"Leaders can make mental health a priority by taking time off themselves, being open about what they're doing, setting an example, and then finding ways to create a trickle-down effect."

Vanna Nguyen

Customer Success Manager, Enterprise, Braze

"Build goals and KPIs around best practices for maintaining good team health. Be an advocate for your team and connect the dots to business productivity."

Parker Chase-Corwin

Senior Director of Customer Success and Support, Paytronix

"Look at employee satisfaction and churn, the cost of hiring, culture surveys, employee engagement, etc., and correlate dollars lost to whatever solid metrics you can. Everyone understands revenue, so driving change at the leadership level is much easier if you express the issues at hand in objective financial terms."

Ben Winn

Community Manager, Catalyst

"Tactically, place this as a recurring agenda item to ensure it remains top of mind in leadership team meetings. Include it in day-to-day dialogue (i.e., messages from the CEO, leadership, etc.)."

Sydney Strader

Head of Customer Success, Catalyst

"Provide benefits that support mental and physical health, and create and ensure a safe work environment for all employees. This means really doing the work to understand privilege and biases."

Renee Bochman

VP, Customer Success, Salsify

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“For new large-scale efforts to become a priority, they often need an executive sponsor. Determine who owns this (responsibility-wise and passion-wise) at the executive level. Work with them to gather company feedback on how people are and how they want to be supported in order to identify priority initiatives.”

Emily Garza

AVP, Customer Success, Fastly

“I think this is changing and companies know now that it’s critical to prioritize it in order for employees to perform well and deliver. Keep mental health and general well-being on the agenda for all of your all-hands and exec meetings. Be honest about your own challenges and share how you’re feeling.”

Jason Noble

VP Global Customer Success, Vinli

“Leadership teams are skilled at running a business, not handling mental health problems. Ensure time and budget for leadership training on how to identify mental health issues and how to address them as a leader and as a company.”

Rachel Yockey

VP Experience, Realync

“Ensure that it’s a business priority, especially as it pertains to productivity. Factor mental health and wellness metrics into your KPIs.”

Jung Kim

Director of Customer Success, NeuroFlow

“Make sure to create some rituals and moments to speak about it, and to address issues that arise. Do everything like an open door. The leader should act as an example and be willing to take the first step!”

Bruno Scott

*COO - Chief of Operations
Office, Kula*

“I think just speaking about it publicly goes a long way (assuming the actions mirror, of course). It’s important to consider the role that the health and well-being of employees has in the larger company strategy.”

Chris Brown

*Director of Customer Success,
Fulcrum*

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Tying it All Together

We learned a lot from initiating and carrying out this project.

KEY LEARNINGS FROM THE DATA:

- There's been a huge increase in mental health concerns.
- People are feeling less connected than they did last year.
- People took much less PTO this year than they did last year.
- Many folks still are not comfortable taking a mental health day (or discussing mental health with managers and colleagues).
- Many companies still don't offer supplemental benefits to take care of their employees' mental health and well-being.

SOME SELECT ACTIONS LEADERS CAN TAKE:

- Lead by example. Be open and vulnerable with your team so that they feel safe to do the same with you.
- Take a mental health day (even if you don't need one) and be vocal about it so that others feel safe to do the same.
- Discuss mental health and wellness as a company in an open town hall format.
- Demonstrate the ROI of employee mental health to leadership in order to get funding for mental health initiatives.
- Provide mental health benefits (therapy, an app budget, workshops, etc.) for employees.
- Get trained on how to properly deal with employee mental health and wellness issues.

We hope that you gained some helpful insights and ideas from this ebook. The Customer Success community may be stressed and anxious, but it's full of some of the most wonderful, positive, and creative people in the world. We wish you and your teams all the best!



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