

# 2022 Customer Success Planning Guide

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# Introduction

Customer Success is a largely self-made industry. There are no courses in school, there are very few certification programs, and most of what we learn is either through our own experience or the experiences of others.

This is fine when you're a Customer Success Manager, where the stakes are limited to managing an account and getting through your EBR with your dignity intact. But what happens when you go higher up the corporate ladder?

The stakes are much higher at the executive level. You have entire teams to think of, and any decision you make can affect the success of the entire organization. How can you be sure that your decisions are the right ones? More importantly, how do you know they're the right ones for you?

This is an important question to ask as we go into 2022, a potentially huge year for businesses that are trying to recover from the pandemic. You want to ensure that you've got the right strategy before you commit resources to them.

One solution is to learn from the experiences of others who've been in similar situations. But the challenge is finding people with similar backgrounds and challenges as yours. It's not exactly something that you can pull from a search engine, and you don't want to potentially expose your problems to the public on social media in the off-chance you'll get a response.

This is why we approached 26 of the smartest and most experienced people in the Customer Success industry and asked them to share their thoughts and strategies as they plan for 2022.

We hope that by looking at the examples of others, we will help influence your own strategy for the better. Improve your infrastructure, streamline your process, and clarify your goals.

Here's to a strong start to 2022!



## Stephen Horning

VP of Customer Success  
Pantheon Systems, Inc

### **Of all the CS-related things you're planning for 2022, which do you think will have the greatest impact? Why?**

There are 3 major initiatives we have for 2022 that will drive the greatest long-term impact in order of time to impact but not total impact. They are:

1. Establish our Tech Touch motion
2. Develop our account health scores
3. Build our customer education program

Establishing our tech touch motion will allow us to start to influence the success (and thus retention and expansion) of our long-tail customers. These customers comprise 40% of our business by ARR and 60% by account number and are currently completely unmanaged. Influencing this segment of our business should create tailwinds for both churn, expansion, and upsell to contract.

Cleaning up our data and developing better account health scores are a key initiative to better understand when, where, and how we need to act on our accounts. It is orders of magnitude easier (on the team and customer) to proactively fix an account vs trying to save an account at renewal.

***“It is orders of magnitude easier (on the team and customer) to proactively fix an account vs trying to save an account at renewal.”***

Finally, ensuring that our customers and partners are well trained on our platform via a new customer education program will increase ease of use, implementation of best practices, adoption of new features, and provide us data on how successful our customers are at using our technology.

## What do you consider to be the biggest challenge facing your team for 2022? Why?

The biggest challenges for 2022 will be running our business, improving our efficiency & effectiveness, and growing at 40% year over year. We are assuming COVID will continue to abate, and growth will get back to normal for next year. We will not have a lot of white space from a bandwidth perspective, at that growth rate, to not be focused on our most impactful initiatives. The efficiency gains also force us to do these initiatives with less white space per headcount. Couple this with the headwinds of going global still under the shadow of COVID and we will have our work cut out for us.

***“The biggest challenges for 2022 will be running our business, improving our efficiency & effectiveness, and growing at 40% year over year.”***

## How do you and your team intend to address this challenge?

We are building a plan to achieve 130% of our targets, and aligning that plan to key initiatives that we need to put in place. We know some of those initiatives will hit above target, some below, and some exactly on target; but if they're well-thought out and well-executed, the sum of those initiatives should average out to being above target. Over the next few months, we will validate the hypothesis of those initiatives via MVPs and experiments. Then, we will fertilize the ones that are working and cull the ones that are not. To be successful our team will need to be dialed into execution - falling behind on a hire or failing to cull or fertilize a key initiative will be the difference between a great year and an OK year.



## Anika Zubair

VP of Customer Success  
inSided

### **Of all the CS-related things you're planning for 2022, which do you think will have the greatest impact? Why?**

I think being more data-driven is actually what will have the most impact. Over the last few years, customer success has started to gather a lot of data and there has been a greater reliance across the business on customer success metrics. Also, companies had to pivot a lot over the past two years to figure out how to use the metrics derived from customer success. Now, most SaaS businesses only look at NRR (net revenue retention). Having relevant data points on which accounts and customers are happy or unhappy or likely to churn is crucial data that will be shared across the organisation.

***“Companies had to pivot a lot over the past two years to figure out how to use the metrics derived from customer success.”***

Customer Success data is also showing which of your customers are using which feature and your marketing team will probably want to know this data in order to leverage it for a case study or to find potential new customers that will love the product as well. Overall the use of customer data across different departments in the business will become even more important and continue to grow in 2022.

### **What do you consider to be the biggest challenge facing your team for 2022? Why?**

Right now we do not have enough CSMs to service our very fast growing client base. We continue to interview and hire but there is a mix of a few things slowing us down.

One, not having the manpower to even start appropriate hiring. Being a startup means everyone is busy doing their jobs already. Adding in recruitment takes time from everyone's day.

Second, the pandemic has made CS a pandemic-proof job which means every company wants a CSM, which thus makes it SO HARD to find CSMs on this super hot market right now.

Finally, the great resignation and people leaving jobs because they are not getting WFH or better benefits etc is also making the market extremely hard to find talent!

## **How do you and your team intend to address this challenge?**

We are hiring non-stop, we will not stop hiring, recruiting or sourcing candidates. We have brought on internal recruitment just for CS and will focus on constantly sourcing. Of course, we have added more headcount into the budget, but even when we hit our desired headcount we will continue to hire because we need to continue to ensure we have great talent and that everyone has a balanced workload as we scale.

***“We are hiring non-stop, we will not stop hiring, recruiting or sourcing candidates.”***



## **Gemma Cipriani-Espineira**

CCO

Chili Piper

### **Of all the CS-related things you're planning for 2022, which do you think will have the greatest impact? Why?**

I predict our "Big 6" initiative to drive higher-value conversations with our customers will have the greatest impact in 2022. It provides a framework for everyone at our company to capture and validate answers to the following 6 questions, upon any customer interaction:

1. Persona: Who intends to use our product?
2. Use case: How do they intend to use it?
3. Business objective: Why do they intend to use it?
4. KPI: How will they measure whether it has been successful?
5. Baseline: What is that measure today?
6. Key Milestone: Which events will this impact?

The answers to these questions will be accessible to everyone at Chili Piper so we can ensure the entire organization is on the same page when it comes to how the customer sees us. By analyzing the responses in aggregate, we can super-charge our efforts to validate our ideal customer profile with real customer examples. The insights help sales sell better, marketing connect with the right people about the right topics, and product build solutions that make customers look good.

### **What do you consider to be the biggest challenge facing your team for 2022? Why?**

It's difficult for CSMs to stand out in a busy world. The remote culture has thrust everyone's digital doors open to the point where distractions are at an all-time high and meaningful interactions are hard to come by. The expectation of "being always on" makes it even more taxing to be efficient. The biggest challenge facing our CSMs is the same challenge facing the entire remote workforce — how can I use my time effectively?

## How do you and your team intend to address this challenge?

We have a good handle on the breadth of our product adoption. Currently, we send automated triggers to our CS tool based on low usage, which allows our CSMs to organize their time efficiently by focusing on flipping inactive customers to re-activate.

For 2022, we plan to go deeper into the depth of product adoption, which gives us richer insights into how customers are using the product. We've made a huge investment in operations to go further into our data. In tandem, we've hired our first Customer Success Enablement Manager to help the team learn how to apply this data to achieve superhuman status. The intention is to make the most of our CSM and customers' time. This is a growing need as we launch new products and it enables the team to provide more meaningful interactions with our customers.



***The remote culture has thrust everyone's digital doors open to the point where distractions are at an all-time high and meaningful interactions are hard to come by."***



## Ron Schnackenberg

Head of Customer Success  
Query.AI

### **Of all the CS-related things you're planning for 2022, which do you think will have the greatest impact? Why?**

I'm excited to finalize our customer health score project. I feel this has the largest impact for a few reasons. Every team across Query contributes data to the customer health formula, so this truly impacts the entire organization. This also enables our CS team to be far more proactive at serving our customers, resulting in a much better customer experience.

### **What do you consider to be the biggest challenge facing your team for 2022? Why?**

Growth management is definitely going to be the biggest challenge for 2022.

We're starting from scratch, which is amazing, but building process while expanding the team, especially in today's recruiting environment, is tough. It's really important we have new CS hires ramped up before the current team has bandwidth issues.

***Growth management is definitely going to be the biggest challenge for 2022."***

### **How do you and your team intend to address this challenge?**

We are carefully selecting our CS tools to enable us to maximize efficiency. Establishing efficient processes from the start, makes such a big difference as more and more customers join.



## Marina Gu

Head of Customer Strategy & Operations  
Eightfold

### **Of all the CS-related things you're planning for 2022, which do you think will have the greatest impact? Why?**

Because we're a new team at a fast growing company, we are focused on process and governance. Clearly articulating the new & existing customer playbook, building instrumentation to log progress / outcomes, and internal processes to audit for quality & comprehensiveness. We need to make sure all the CSMs know the full set of tools they have at their disposal to impact customer outcomes, and are making use of those tools across their portfolio.



***We need to make sure all the CSMs know the full set of tools they have at their disposal to impact customer outcomes"***

### **What do you consider to be the biggest challenge facing your team for 2022? Why?**

Like many CS organizations, we are severely understaffed. CS hiring has trailed the number of deals closed, partially because of old CS:account ratios that were too high. Now that we know what investment is required to make accounts successful with the product, we need to unblock our team members so they can put the time and focus on their accounts.

### **How do you and your team intend to address this challenge?**

Currently going through a forecast exercise to understand what distribution of accounts we expect to see in 2022, and making sure we assign accounts today that aligns with where we need to go -- to make sure we minimize the # of handoffs.



## Conor Cox

Chief Revenue Officer  
Proposify

### **Of all the CS-related things you're planning for 2022, which do you think will have the greatest impact? Why?**

We're excited about rolling out our 'ultralight' CS model to thousands of our SMB customers. We've crystalized best practices from our largest (and most successful) accounts, and packaged them up in a format that will benefit businesses of any size.

### **What do you consider to be the biggest challenge facing your team for 2022? Why?**

Our largest challenge is prioritization. Our product-led growth strategy has generated incredible interest in our product and the power it provides, which has resulted in an incredible boom in users and logos. Bringing customer success into the presales process is our biggest opportunity for 2022.

“**Bringing customer success into the presales process is our biggest opportunity for 2022.”**

### **How do you and your team intend to address this challenge?**

We're revisiting how we move (and visualize) data throughout our organization. We're asking our team to focus more on growth and driving business, which means they need different types of information at their fingertips.

We are also developing new service offerings (focused on our SMBs) to help drive the customer behaviours we know lead to success.



## **Star Hofer**

VP of Customer Success  
PartnerStack

### **Of all the CS-related things you're planning for 2022, which do you think will have the greatest impact? Why?**

The biggest challenge facing our team today is those who need more assistance defining their partnership program outside our application. The application is excellent for supporting and accelerating a partnership program, but one must exist first. Since we are defining a new category with B2B partnerships, we recognize that we need to develop a blueprint on what a great partnership program looks like and the levels of maturity that fall within it. Once we define the blueprint, it will provide clarity, consistency and predictability for the CSM's and an easier way to determine success plans.

### **What do you consider to be the biggest challenge facing your team for 2022? Why?**

We have been growing rapidly, and as a result, we don't have alignment between CS and Product on how to measure adoption with a highly configured product systematically. Both teams grew more than 50% this year, so we are still in the storming stage.

### **How do you and your team intend to address this challenge?**

We have changed our NorthStar metric, which will go a long way in creating alignment. The most significant step is creating more cross-functional teams that work on initiatives together. Initiatives where we define what is the ideal outcome of each product offering, what makes it sticky and how to measure the results systematically. Then operationalize the data so the CSM spends less time hunting for the data and can focus on farming the data instead.



## Jessica Bicknell

Vice President, Customer Success  
LinkSquares

### **Of all the CS-related things you're planning for 2022, which do you think will have the greatest impact? Why?**

I'm excited to invest in the right customer intelligence tools to enable our Customer Success organization to be more efficient, more proactive and more data-driven in anticipating customer needs, mitigating churn risk and increasing retention.

### **What do you consider to be the biggest challenge facing your team for 2022? Why?**

As a high-growth SaaS organization, our Customer Success team's biggest challenge in 2022 will be scaling our data-driven delivery model to ensure repeatability and consistency, while maintaining a personalized, customer centric approach that delights customers and drives retention.

### **How do you and your team intend to address this challenge?**

We will accelerate our investment in our people and our platforms, and will continue to hire tenacious, smart, curious and highly-motivated team players who embody our company values and can deliver the customer outcomes that drive retention.

“***We will accelerate our investment in our people and our platforms”***”



## Ryan Seams

Director, Customer Success  
Mixpanel

### Of all the CS-related things you're planning for 2022, which do you think will have the greatest impact? Why?

#### 1. Customer Success Operations:

Scaling a CS team requires not just people, but also efficient operations. This includes CS tools, but more broadly includes targeted program execution that can increase the efficiency of all team members. We are looking to level up our tooling and processes to be efficient at all levels so all CSMs leverage the same best practices without re-work.

“*We are looking to level up our tooling and processes to be efficient at all levels so all CSMs leverage the same best practices without re-work.*”

**2. Scaled CS + Digitally-Led CS:** While it's great to have a CSM, not every customer spends enough to afford it. As a PLG company, we're looking for ways to automate outreach to the masses, pick up on signals towards churn when a human needs to intervene, and scale best practices to both low-touch and no-touch customers.

### What do you consider to be the biggest challenge facing your team for 2022? Why?

Scaling best practices from 1:1 CSM accounts to 1:many accounts and the rest of our revenue base. With PLG, our customer split is like 20/20/60 between Digitally-Led, Scaled, and traditional Enterprise CSMs. We need to cover the final 40% efficiently to scale those accounts into our next Enterprise accounts.

### How do you and your team intend to address this challenge?

Bring on tooling and experiment. Every business is different, so we need to experiment with alerts and messaging and utilize CS software to be efficient.



## **Rochelle Shearlds**

Director, Global Customer Success  
Medrio

### **Of all the CS-related things you're planning for 2022, which do you think will have the greatest impact? Why?**

I am creating a junior success role within my organization to focus on low-touch customers and drive product adoption. I'm really excited to see the results of owning the holistic voice of the customer and proactively providing a better experience for every customer.

### **What do you consider to be the biggest challenge facing your team for 2022? Why?**

Building a new role will present some team maturity obstacles. There will be a heavy focus on building out the day-to-day and ensuring the Specialists are equipped to execute their job.

Implementing automation into our engagement strategy is critical as they will be managing a large portfolio and we do not want to water down the customer experience.

“**Implementing automation into our engagement strategy is critical**”

### **How do you and your team intend to address this challenge?**

I plan to partner with cross-functional teams to help with product training and org best practices. I will also leverage the CSMs to help identify customer engagement instances that make sense to automate and our Sales Ops organization to integrate automation within our CRM and CS platforms.



## Mary Poppen

Chief Strategy & Customer Officer  
involve.ai

### **Of all the CS-related things you're planning for 2022, which do you think will have the greatest impact? Why?**

I am most excited to see the Customer Intelligence Movement continue to grow and transform. As Customer Success is shifting from a cost center to a revenue growth engine, Customer Intelligence will play a huge role in helping companies deliver more personalized, valuable outcomes to their customers while accelerating internal business results.

“**Customer Intelligence will play a huge role in helping companies deliver more personalized, valuable outcomes to their customers”**

### **What do you consider to be the biggest challenge facing your team for 2022? Why?**

Educating the market about Customer Intelligence and bridging the gaps between creating customer value, revenue and AI will be a big challenge for my team this year mainly because many companies are still skeptical about the power of AI.

### **How do you and your team intend to address this challenge?**

At involve.ai, we are working to produce more content, including use cases, whitepapers, and benchmark studies to demonstrate how companies and their customers can significantly benefit from AI-infused Customer Intelligence. With this effort, we hope to help companies make data-driven decisions based on fully understanding their customers' voices and behaviors.



## Ralphette English

Head of Customer Success  
Deepgram

### **Of all the CS-related things you're planning for 2022, which do you think will have the greatest impact? Why?**

Embracing the concept of learning-focused meetings.

In Customer Success, we talk a lot about touchpoints; but are your touchpoints adding value? Ultimately, the outcome of each touchpoint is what really matters. To ensure we remain outcome and value-focused, we are shifting the concept of our QBRs and focusing more on learning meetings.

Customers are experts in their business, not ours. A learning-focused meeting gives us an opportunity to have a conversation about them. We can learn their company priorities and how we can better service their needs. Less talking, more active listening. The outcome of a successful learning meeting means our CSMs have a clear view of what is important for the customer, target milestones, and a clear path forward to growing our partnership. Through learning meetings, we want to give our customers the opportunity to influence our roadmap and to be heard.

***“A learning-focused meeting gives us an opportunity to have a conversation about them.”***

### **What do you consider to be the biggest challenge facing your team for 2022? Why?**

Our biggest challenge is developing a post-sales support model that not only meets our customers' needs but also meets them where they are. Since the pandemic, companies have shifted how they operate. Many teams are remote and supporting this model can be a challenge. We've seen a dramatic shift of customers moving towards online channels to not only support their remote employees but to also interact with vendors. Our normal

has changed. Grabbing coffee with a customer or flying out to visit their office isn't always an option. How can we connect over Slack or video conferencing while still maintaining a high-level of customer success? When your customers shift, it requires you to develop new strategies and practices to remain competitive.

## How do you and your team intend to address this challenge?

We are planning to focus on the following 3 initiatives to address this challenge:

**Strengthening Executive Alignment:** In our business, our customers rely heavily on Slack to communicate. Although Slack provides a quicker response for our customers, it reduces our ability to personally connect on the customer's long-term priorities. We will be launching a series of customer learning meetings and shifting away from the one-size-fits-all QBR approach. Through these learning meetings, we'll be able to gain and maintain executive alignment, which will ultimately allow us to continuously add value and reduce churn. By growing our executive-level customer relationships, we will also be focusing on growing our joint marketing efforts and helping our customers shine in their respective industries.

**Enhanced Slack integrations:** As Slack is our customers' preferred way to communicate with us, we are doubling down on making the most out of this communicational channel. From a Support perspective, we will integrate Slack with our ticketing system to give our broader teams more visibility into customer asks. From a Customer Success perspective, we will be leveraging Slack's integration with the same project management software our Product team uses. By doing so, we will be giving our Product team real-time visibility into features requests with full context. We know that by using Slack efficiently, our Customer Success and Support team will be advocating for our customers more efficiently than ever before.

**Post-Sales Customer Support:** Procuring the right technical resources to support our customers regardless of where they are in the customer journey. Ensuring that we are outlining a feasible and scalable scope of support for customers externally and setting expectations for our internal technical teams on how they will be assisting customers. As a company, we will be growing our Technical Support and Product teams to provide subject matter experts that will support our customers from deployment, expansion, and renewals.



## Boaz Maor

Chief Customer Officer  
talech

### **Of all the CS-related things you're planning for 2022, which do you think will have the greatest impact? Why?**

For all of the negative impact of COVID, it has positively accelerated adoption of many technologies, especially for remote work. Not only do our teams work remotely instead of in-office, but so do a large portion of our customers. They have now gotten used to engaging with us and our teams remotely. TeleMedicine adoption has increased in acceptance, Zoom is a household name, and even colleges and universities have deployed remote learning programs.

**Implications:** while there is always value in meeting people, many of our customers may prefer to continue in the operating mode of the recent months. They may not wish to spend time on the logistics of face-to-face meetings, especially if many of them still work from home. Furthermore, they may have learned to appreciate the digital updates we have started to provide them in lieu of not having those meetings.

**Suggestions:** In the land of Customer Success, when less of the work can be done face-to-face, more of the work can and should be done digitally. This makes the TechTouch strategies (aka Digital Customer Success) applicable to more customers and more service providers.

We plan to directing significant investment into additional digital / tech-touch tools and best practices from LMS to CS Platform to In-app guidance tools to Customer Community and more as the base operating structure for all of our customers.

### **What do you consider to be the biggest challenge facing your team for 2022? Why?**

We expect hiring and acquiring talent to continue to be very hard. Hiring is Very Hard:

For a multitude of reasons, the job market has become very tough for CSMs and

many other Knowledge-extensive jobs. The growing economy is increasing demand for talent. The explosion of investment in startups (both internal investments and public offerings) further increases demand while also putting upward pressure on salaries from those cash-rich companies who set the tone in the marketplace. On top of these factors, the Customer Success field continues to grow fast as more and more companies acknowledge the value of the function to their growth and operations. Such growth continues to push demand for skilled people higher. And if those things were not enough, the desire of many CS professionals, especially early in their careers, to be able to work remotely carries the risk of shrinking the supply of talent.

## How do you and your team intend to address this challenge?

We invest heavily in our people:

**Mission:** We provide a solution that makes a very meaningful impact on the lives of small businesses. It is not just helping us make money, it helps them operate and survive in the very tough economy around them. We believe that people today want to work for mission-driven companies.

**Growth opportunities:** We are growing very fast (>150% last year and expecting to accelerate that in 2022). This opens up a multitude of growth opportunities for the people who join us.

**Skill Development:** we invest heavily in helping our people develop their skills and capabilities. We launched a tech University site (via an LMS), overhauled our New Hire Training and ongoing training programs, conduct frequent performance reviews and constantly look for how people can elevate their skills. We believe that people want jobs that not only earn them money, but also enable them to grow their skills and develop their careers.

**Fun:** Having Fun is one of our core values (it literally is!). We believe that when people have fun, they work better, especially in servicing customers.

***“We believe that when people have fun, they work better, especially in servicing customers.”***



## **Emilia D'Anzica**

Managing Director, Founder  
Growth Molecules, LLC

### **Of all the CS-related things you're planning for 2022, which do you think will have the greatest impact? Why?**

We have developed 16 highly interactive courses for Customer Success Professionals, in the areas of Fundamentals, Advanced, and Leadership, that we are very proud of and love teaching! We believe these courses are enabling both CSMs and CS Team Leaders with the relationship building skills that lead to renewals and growth. We are so excited to officially launch the Growth Molecules Education Program online in 2022 and have already certified over 380 people this year.

### **What do you consider to be the biggest challenge facing your team for 2022? Why?**

Our biggest challenge in 2022 is to scale fast enough to meet the demands of companies wanting to engage in customer success education and enablement programs. This opportunity to help companies with assessments, recommendations, playbooks, and education is a good challenge we are thankful to have! As part of the growth equation, we have to make sure we enable our own team with the skills, tools, and processes that will allow maximum impact for clients. The founding team has worked hard and long hours to develop IP, test, and deliver content. Now we need to ensure we are sharing it in the most efficient way possible without sacrificing quality of delivery and impact.

### **How do you and your team intend to address this challenge?**

Hire more talented people to join our delivery team as well as customer success educators to teach (our courses are with live instructors and/or electronic boards). We are a team of professionals who have been in the trenches as CSMs, trainers, onboarders, community, support, operations, enablement and professional service managers, as well as leaders in Success. We understand first hand the importance of investing in people, process and technology to scale so that is where we will be addressing continuously in 2022 and beyond.



## Shari Srebnick

Head of Customer Success-US  
Searchmetrics

### **Of all the CS-related things you're planning for 2022, which do you think will have the greatest impact? Why?**

I'm looking forward to collaborating with our team to revisit and shift our customer segmentation to better serve our customers at different phases of the life cycle.

Segmentation is a key foundational piece to growing revenue and moving customers forward with your portfolio of solutions. Since our business model has shifted over the years, it's time to adjust how we segment our customers, which will help determine the proper engagement model going forward.

***“Segmentation is a key foundational piece to growing revenue and moving customers forward with your portfolio of solutions.”***

### **What do you consider to be the biggest challenge facing your team for 2022? Why?**

Resources, aka headcount. Right now, we're very close to capacity in regards to account load, and that's not even considering what's in the pipeline. It's forcing us, in some cases, to be more transactional than we'd like.

### **How do you and your team intend to address this challenge?**

Revisiting segmentation and creating a new framework, as previously mentioned, should help us work some of this out. It will also help redistribute the workload so that it is more balanced, and provide more time to focus on the more strategic activities that directly impact retention and expansion.



## **Leah Chaney**

Chief Experience Officer  
BetterGrowth

### **Of all the CS-related things you're planning for 2022, which do you think will have the greatest impact? Why?**

I'm really excited about starting the year off with our annual Customer Journey review. We started this last year, where we start the month of January off with a team Customer Journey revamp. I love this because it helps get our internal teams aligned and also makes sure we are starting our new year off focused on our customers. My favorite way to do this for our remote team of employees is to order everyone their favorite breakfast AND lunch and have a half day together using online white board software to sketch out the journey. Then our Marketing team does their magic.

### **What do you consider to be the biggest challenge facing your team for 2022? Why?**

We definitely have some key roles to fill in 2022 to keep up with our goals and commitments. Like a lot of companies right now, we have to balance current client needs with less manpower than we would like. Our goal is to continue to hire rockstars in 2022 that are as customer obsessed as we are!

### **How do you and your team intend to address this challenge?**

We are working hard with our current team to find great ways to be more efficient. Less internal noise, eliminating unnecessary meetings, and utilizing slack and other tools to communicate in the moment. I've also recently implemented a rule that every CS focused team member has to have one full day a week where they don't book meetings. We call this day CSATday and the idea behind it is to dedicate a full day to customer needs and followup.



## Maranda Dziekonski

Chief Customer Officer  
Swiftly

### Of all the CS-related things you're planning for 2022, which do you think will have the greatest impact? Why?

We are doing two very big things that I think will have a pretty huge impact.

1. We are implementing our first every tech-touch (lower touch) segment. We are at an inflection point in our growth where we cannot continue to grow and scale each segment in a high-touch manner. We have to get creative and think through how we leverage technology and other resources to drive value rather than relying heavily on human touch. I am also hopeful that this will free some of our CS resources to be able to focus more on strategy rather than tactics.

***“We have to get creative and think through how we leverage technology and other resources to drive value rather than relying heavily on human touch.”***

2. We are bringing on our first-ever CS Operations leader.... need I say more here?

### What do you consider to be the biggest challenge facing your team for 2022? Why?

We need to become more efficient and still deliver the same great experience that we've always delivered along with the solid outcomes and clear ROI.

### How do you and your team intend to address this challenge?

We are rethinking everything from segmentation, onboarding, team structure... you name it! We are trying to figure out what can be automated, what can we solve through tools, what processes need love. Nothing is off the table. Important call out here, nothing is currently broken, we just want to continue iterating, improving, learning and becoming more efficient as we grow and scale.



## Emily Garza

VP, Customer Success

Proton.ai

### **Of all the CS-related things you're planning for 2022, which do you think will have the greatest impact? Why?**

Starting at a new early stage company, the focus for 2022 is going to be on ensuring we know our customers. This includes mapping out a customer journey, being able to identify goals for our tool and ROI associated, and documenting key details so all team members have visibility. While it is some of the basic stuff, it is critical for a strong foundation.

### **What do you consider to be the biggest challenge facing your team for 2022? Why?**

With an early stage company, there is often a lot to build with fewer resources than you'd like. Some of the critical challenges I anticipate include establishing cross functional processes (in a way that works for CS as well as peer teams), maintaining team culture as we grow and evolve, and segmenting customers and experience levels. Developing these structures intentionally will set us up to scale.

“**Creating a culture of transparency and communication allows you to address issues faster, brainstorm for the best ideas, and create buy-in on solutions.”**

### **How do you and your team intend to address this challenge?**

A lot centers around communication. As a leader, I need to communicate opportunities I see or challenges the team needs to address (Not just what - but also why!) From existing team members, they need to communicate what is working well, where they see gaps, and ongoing customer feedback. Creating a culture of transparency and communication allows you to address issues faster, brainstorm for the best ideas, and create buy-in on solutions. We also can't be afraid to try something new (or change something we tried) - iterating helps you get to the right solution or process.



## Sana Farooq

Director of Customer Success  
FloQast

### **Of all the CS-related things you're planning for 2022, which do you think will have the greatest impact? Why?**

I am really excited to begin building our Customer Education division from the ground up. This will result in our CS team spending less time on trainings/more time on strategic support for our customers, increase the time to value our customers have with our product, and generate services revenue for our organization as well.

### **What do you consider to be the biggest challenge facing your team for 2022? Why?**

The biggest challenge our team will be facing in 2022 is scaling from 70 members to a department of 120 in one year. It's a great problem to have, as it is only possible with so many new customers coming in the door, but also results in additional needs for operational consistency, training, systems, and defined processes that we are always looking to get ahead of.

“*The biggest challenge our team will be facing in 2022 is scaling from 70 members to a department of 120 in one year.*”

### **How do you and your team intend to address this challenge?**

Our new Customer Education and Enablement division will be a great way to ensure everyone on the team is regularly receiving the training and resources needed in order to be successful, and that we are able to reach more users with ways to get value out of our application.



## Brian LaFaille

Director, Customer Success Programs  
Google

### **Of all the CS-related things you're planning for 2022, which do you think will have the greatest impact? Why?**

Partner Strategy and Success: CSMs and CS in general can only scale so far. The next phase of our success will be through our partners delivering successful outcomes on our behalf. Of each of the scaling initiatives we're aiming to tackle next year, our partner strategy is at the top of the list.

### **What do you consider to be the biggest challenge facing your team for 2022? Why?**

Scaling moments of truth. As the number of accounts covered by a named CSM decreases, we risk losing the personal human-to-human connections we have with our customers. Moving more customers into a scaled motion has always been the goal, but now a key opportunity is to strive for increased personalization to maintain our human-to-human connection we have with our customers.

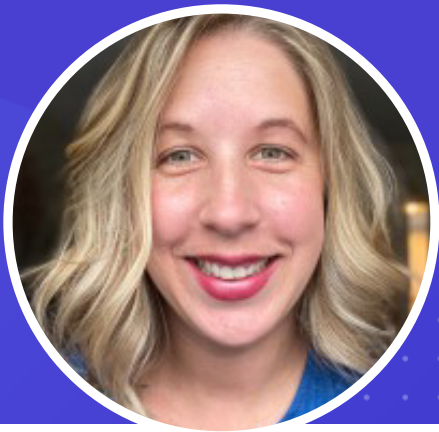
### **How do you and your team intend to address this challenge?**

We're tackling this from a few different perspectives:

**Education:** Invest in training around empathy and active listening for the moments when we are face-to-face with customers. We want to make those moments count.

**Budget:** CSMs (scaled & named) have budget assigned for moment of truth gifts to celebrate key milestones with a customer.

**Community Events:** If we can't have 1:1 connection with customers, let's bring lots of customers together to grow their own network. Investing in community events is key to scaling relationships not just between us and our customers, but between the customers themselves.



## **Dana Alvarenga**

Vice President of Customer Experience  
SlapFive

### **Of all the CS-related things you're planning for 2022, which do you think will have the greatest impact? Why?**

In 2022, I have a lot of plans to help enable my customers while also driving more customer engagement. I plan to create a full suite of training documentation and videos to empower my customers to be power users and create a stickier solution.

In addition, we are planning a road show event for our greater community that includes my customer base to major cities to promote peer-to-peer networking and customer engagement in their "backyard."

Last, we plan to continue to fine tune and improve our buyer journey and onboarding process to make it as seamless, high touch, and mutually beneficial to ensure we start every relationship off on the right foot.

### **What do you consider to be the biggest challenge facing your team for 2022? Why?**

The biggest challenge for me in 2022 is not having a team just yet. Once more trainings are created and in place, and our onboarding process has been streamlined, I can then evaluate the work load and make a plan to expand the team so every client gets the dedicated attention we set out to deliver.

Having a SaaS product does not mean we set it and forget it. We believe in regular check ins and become extensions to our customers team. To keep up that momentum as we grow we will need to grow internally, at the right time. Figuring out that "right time" is the current and future challenge.

### **How do you and your team intend to address this challenge?**

Right now we plan on building processes to help streamline internal and external

handoffs. We're rolling out a more robust onboarding process and workflow. Being in a smaller start up stage company, we wear many hats. In 2022, we plan to make clear definitions on what we each do as an organization and what we will and will not do within contract terms for customers to make sure we do not overpromise and potentially underdeliver.

“**Right now we plan on building processes to help streamline internal and external handoffs.”**



## **Kate Walsh**

VP Customer Success and Support  
Klaviyo

### **Of all the CS-related things you're planning for 2022, which do you think will have the greatest impact? Why?**

In 2022, I'm most excited to expand the scope and focus of our customer segments to better improve every single customer interaction. Historically, we've been focused on both our entrepreneur and SMB customer's experience through creating a detailed customer journey and measuring key milestones.

We have made significant improvements based off those milestones, creating a more frictionless customer experience via in-app and through education content, certifications, and programming. Focusing downmarket has enabled us to quickly build for our MidMarket and Enterprise customers.

The adage "a rising tide raises all ships" applies here. Starting downmarket and solving for the customer experience in a touchless/in-app way, then moving upmarket with adding in a higher touch and more technical service model will allow us to more easily optimize our MidMarket customer experience. Excited to grow with ALL of our customers in 2022!

### **What do you consider to be the biggest challenge facing your team for 2022? Why?**

Our biggest challenge next year is to ensure we're executing against our multiple priorities. When you have many priorities, you may not do any well. There's risk there, so we need to ensure we solve for that challenge with creating cross-functional dedicated teams against each company priority. We will ensure success, with having a focused and dedicated team each own 1 priority to hyper-focus on the execution and measurement.

### **How do you and your team intend to address this challenge?**

See above :)



## Manuel Harnisch

Vice President, Customer Success  
People Data Labs

### **Of all the CS-related things you're planning for 2022, which do you think will have the greatest impact? Why?**

In one word: Hiring.

2021 was a foundation year for us here at PDL. When I joined the team in January, things were just getting started and I moved quickly to hire a few key team members and get a basic level of structure established. A lot of time in the first half of the year was spent on "mopping up some spills" and also just learning the DayS industry and the use cases in general.

From there, we've been spending a lot of time on documenting our processes to date (the "What") and soon the "How", all in anticipation of some significant team growth going into 2022. The team has been running "extremely hot" as a result of delaying hiring more people until we had some of this documentation in place and so I very much look forward to addressing that as we look to 2022.

### **What do you consider to be the biggest challenge facing your team for 2022? Why?**

Absorbing all the new team members we plan to bring on. Our current plans call for more than doubling the CSM, CSE and SE teams and with that will come a number of challenges around the culture and momentum of the team. As someone who has had excellent and very poor new employee onboarding experiences, I believe it's critical to set everyone up for maximum impact and ensure they continue to feel good about the choice they've made to join PDL. I know the team feels similar and is often stressing excessively to ensure they provide a great environment for others to work in and be successful in as well.

## How do you and your team intend to address this challenge?

That's a great question. Truthfully, I am not 100% sure we have it all figured out just yet, and that's ok. We have some incredibly compassionate but also ambitious people on the team. Ruthless prioritization and focus will be key, but

even more importantly, developing leaders and providing opportunities for introspection and reflection. Running hard and over capacity for extended periods of time wears you out, so I'll be focused on ensuring that everyone has an opportunity to take breathers and to rely on their teammates to carry them through.



***Ruthless prioritization and focus will be key, but even more importantly, developing leaders and providing opportunities for introspection and reflection.”***



## **Himanshu Garg**

General Manager, Global Customer Success  
Schneider Electric

### **Of all the CS-related things you're planning for 2022, which do you think will have the greatest impact? Why?**

I'm actually looking forward to widening the scope of our data analytics piece. This will give us authentic customer usage trends to set accurate renewal forecasts. It will also help create a value prop that's more relatable for our customers.

### **What do you consider to be the biggest challenge facing your team for 2022? Why?**

Well, there is a lot of exciting new stuff happening. Our team can feel a little bit overwhelmed at times.

### **How do you and your team intend to address this challenge?**

We are continuously investing in building a training & development curriculum. This will ensure our CSMs are well equipped with tools, processes and knowledge to effortlessly cope up and eventually ease out the load on our CSMs!



## Jeff Heckler

Director of Customer Success Solutions  
MarketSource, Inc.

### **Of all the CS-related things you're planning for 2022, which do you think will have the greatest impact? Why?**

In 2022, I will be further empowering every member of my company - especially in Sales and Marketing - to create and close opportunities for Customer Success. Our Customer Success Department has and will continue to create internal and external educational and positioning content for Sales and Marketing to be the force multiplier for Customer Success. Furthermore, every member of our organization realizes they are an active and important part of our total Customer Experience by MarketSource journey. Each and every individual is engaged with and is empowered to add value to, our customers' journeys.

### **What do you consider to be the biggest challenge facing your team for 2022? Why?**

The biggest challenge, and opportunity, for our Customer Success Department, is to maximize CS principles and practices to serve all of our customers, not just SaaS customers. As I say, "CS is not just for SaaS anymore!" Every part of our organization, and any organization that provides products and services, can benefit from the power and reach of Customer Success. From the first introduction to a company to a Customer for Life program and journey, Customer Success can help architecture environments to maximize the value and ROI for customer and company.

### **How do you and your team intend to address this challenge?**

Our Customer Success Team is already winning with customers of all sizes in all verticals. We need to build use cases, marketing programs, education, and awareness to showcase our revenue contributions to our customers and our company. Additionally, constant sensitivity to change management, as well as education and awareness regarding CS, has to be shared and implemented throughout our organization.



## Sydney Strader

Head of Customer Success  
Catalyst Software

### Of all the CS-related things you're planning for 2022, which do you think will have the greatest impact? Why?

Operationalizing our CS processes in a Customer Success Platform will have the greatest impact (and I'm truly not saying that just because I work at Catalyst). There are several reasons why...

**1. Insights:** By standardizing dashboards highlighting key business metrics, we're able to effectively communicate to our partners across the business in an effort to help channel their focus in order to drive the biggest impact. For example, to support our go-to-market (marketing/sales) efforts we're able to highlight themes that inform our ideal customer profile (ICP) and the profile of good vs. bad fit customers. We're able to highlight themes that inform our product roadmap based on the customer needs we've identified to help ensure our Product, Engineering and Design partners are building features that will drive NDR.

**2. Action:** Through a CSP platform we have the ability to prescribe the desired CS actions to be taken by our CS team. This allows us to improve CSM ramp time, drive consistency in the customer experience we deliver, and optimize for efficiencies in each of our workflows leveraging automation where feasible. All of this enables us to dedicate our CS team's time to the areas that will drive the biggest impact for our customers.

**3. Influence:** This one may be more personal to Catalyst, but I want to ensure as the Catalyst Customer Success team we are maximizing the full value our platform has to offer. Feeling this value first-hand daily will enable our team to naturally advocate and prescribe recommendations to our customers based on their first-hand experience using our product.

## What do you consider to be the biggest challenge facing your team for 2022? Why?

The biggest challenge I foresee ahead for 2022 is how we continue to scale the CS organization without jeopardizing the exceptionally high bar we've set and consistently delivered against from a customer experience standpoint.

The experience our CS team delivers to our customers serves as a competitive differentiator in the market. That's something we're incredibly proud to have accomplished and take great pride in ensuring that as we scale that is never compromised.

## How do you and your team intend to address this challenge?

We have recruited exceptional talent to achieve this initial bar. We must continue to replicate what has already proven successful in our recruiting approach.

In addition, a focus on employee onboarding, training & enablement, and individual performance plans clearly outlining the roles & expectations of each CS team member will ensure we're setting the collective CS team up for success to uphold our vision.

***“We must continue to replicate what has already proven successful in our recruiting approach.”***

## About Catalyst

Catalyst is the world's most intuitive Customer Success Platform (CSP), built by an experienced group of industry leaders. Previously, our founder built an effective Customer Success organization for one of the fastest growing cloud companies in the world.

Catalyst integrates with all the tools you're already using to provide one centralized view of customer data. Customer Success Managers can proactively take the right actions to prevent churn, such as receiving automated alerts when a customer is not using certain features that are critical to their success.

Based in New York City, Catalyst is a venture-backed company founded by Edward Chiu and Kevin Chiu

Learn more at [GetCatalyst.io](https://GetCatalyst.io)

