

Customer Success Proactivity & Efficiency Survival Kit

This kit outlines key areas and actionable steps for CSMs to transition from a reactive approach to a proactive and efficient model, drawing insights from community discussions.

Best Practices: Transforming Your Approach

Embracing these practices shifts your mindset and actions towards proactive customer success.

- **Proactive Engagement Model**

- **Target State:** You consistently engage with customers based on predictive indicators and their journey stage, rather than solely in response to their inquiries or issues.
- **Steps to Reach Target State:**
 1. Identify key moments in the customer lifecycle (e.g., onboarding milestones, feature adoption points, contract renewal date).
 2. Work with your manager or CS Ops to identify available data (e.g., usage data, support ticket trends) that can signal customer health or potential opportunities/risks *before* they become explicit.
 3. Based on segments and data signals, plan and schedule specific proactive touchpoints (e.g., value review calls, tips on underutilized features, check-ins with secondary stakeholders).
 4. Block dedicated time in your calendar for proactive outreach and preparation.

- **Strategic Customer Segmentation**

- **Target State:** Your customer book is clearly segmented, and you understand the expected level and type of engagement for each segment, allowing you to prioritize your time effectively.
- **Steps to Reach Target State:**
 1. Understand the current customer segmentation used by your company (if any).
 2. If segmentation exists, clarify the defined engagement model and expected outcomes for each segment you manage.
 3. If segmentation is informal or non-existent, discuss with your manager potential ways to group customers based on factors like revenue, industry, complexity, or potential for growth, to help focus your efforts.
 4. Allocate your time and resources according to the strategic importance and needs of each segment.

- **Clear Role Definition (CS vs. Support)**

- **Target State:** There is a clear understanding (both internally and with customers) of the distinct roles of Customer Success and Customer Support, minimizing reactive support work for CSMs.
- **Steps to Reach Target State:**
 1. Internal Alignment: Work with your manager to ensure a clear internal definition of responsibilities between CS and Support.
 2. Set Customer Expectations: Communicate clearly to customers during onboarding and ongoing interactions when to contact CS (strategic guidance, value realization) vs. Support (technical issues, how-to questions).
 3. Develop Handoff Protocols: Establish clear procedures for handing off issues or requests between CS and Support to ensure nothing falls through the cracks.
 4. Track Your Time: If you are consistently doing support work, track the time spent to build a case for clearer role delineation or additional resources.
- **Focus on Driving Quantifiable Value**
 - **Target State:** You consistently articulate and demonstrate the measurable value your product delivers to customers, moving beyond just relationship management.
 - **Steps to Reach Target State:**
 1. During initial customer interactions (like onboarding or kick-off calls), actively discover the customer's key business objectives and how they *define* success with your product.
 2. Identify which product features or usage patterns are most likely to drive those specific outcomes for the customer.
 3. Track relevant customer data or KPIs (where accessible) that align with their objectives.
 4. Prepare to present the value realized (using data where possible) in regular check-ins and business reviews.
- **Culture of Continuous Learning & Improvement**
 - **Target State:** You actively seek to improve your skills, knowledge, and approach to stay ahead and proactively address customer needs.
 - **Steps to Reach Target State:**
 1. Allocate dedicated time for professional development (e.g., reading industry articles, taking online courses, attending webinars).
 2. Seek feedback from managers and peers on your performance and identify areas for growth.
 3. Learn about new product features and updates proactively so you can educate customers before they discover them on their own or encounter issues.
 4. Share your learnings and best practices with your team.

- **Proactive Feedback Loop**

- **Target State:** You have established channels to gather customer feedback proactively and ensure it is acted upon by relevant internal teams.
- **Steps to Reach Target State:**
 1. Understand your company's current methods for collecting customer feedback (e.g., surveys, feedback forms).
 2. Proactively solicit feedback during your customer interactions, especially at key points in their journey.
 3. Learn the process for submitting customer feedback to Product, Engineering, or other relevant teams.
 4. Follow up internally on the status of feedback and close the loop with the customer when their suggestions have been considered or implemented.

Standard Operating Procedures (SOPs): Building Repeatable Proactive Processes

Implementing and utilizing SOPs ensures consistent and efficient execution of key CS activities.

- **Documented Onboarding Journey**

- **Target State:** A clear, documented, and repeatable onboarding process exists that guides customers from sign-up to initial value realization with defined internal steps and customer-facing resources.
- **Steps to Reach Target State:**
 1. Map out the current steps a customer goes through during onboarding.
 2. Identify key milestones that indicate successful progress towards activation and initial value.
 3. Document the internal tasks and customer-facing touchpoints required at each stage.
 4. Identify or create necessary resources (e.g., checklists, tutorials, templates) for both CSMs and customers. Advocate for or contribute to formalizing this documentation.

- **Standardized Health Scoring & Risk Identification**

- **Target State:** A consistent method for calculating customer health exists, and changes in health scores trigger predefined proactive actions.
- **Steps to Reach Target State:**
 1. Understand the current factors used to calculate customer health (if any).
 2. If a formal system doesn't exist, propose key metrics you believe indicate customer health or risk based on your experience.
 3. Learn how to access and interpret customer health scores in your CS platform or reports.

4. Work with your team to define what actions should be taken when a customer's health score changes (e.g., red score triggers immediate outreach and internal review; green score triggers identification for advocacy or upsell).
- **Proactive Engagement Playbooks**
 - **Target State:** Defined sequences of proactive actions exist for common customer scenarios, guiding CSMs on when and how to engage.
 - **Steps to Reach Target State:**
 1. Identify recurring situations where proactive outreach is beneficial (e.g., low feature adoption, upcoming renewal, post-support resolution follow-up).
 2. For these scenarios, outline the recommended steps, messaging (templates), and timing for CSMs.
 3. Document these sequences as simple playbooks or guides accessible to the CS team. Advocate for implementing these in your CS platform if possible.
 - **Standardized Value Review Process**
 - **Target State:** A consistent process for conducting periodic value reviews with customers is in place, ensuring regular focus on outcomes and ROI.
 - **Steps to Reach Target State:**
 1. Determine the optimal frequency for value reviews for different customer segments.
 2. Develop a standard agenda or framework for value review meetings that includes reviewing past goals, highlighting achievements and value delivered, and discussing future objectives.
 3. Prepare in advance for each value review by gathering relevant customer data and success stories.
 - **Structured Churn Analysis**
 - **Target State:** A formal process is followed whenever a customer churns to identify the root cause and capture insights to prevent future churn.
 - **Steps to Reach Target State:**
 1. Understand the steps involved in the churn process within your company.
 2. If possible, attempt to conduct an exit interview with the churned customer using a standard set of questions.
 3. Review the customer's history, including usage data, support interactions, and past communication, to identify potential red flags that were missed.
 4. Document your findings and share them with relevant teams (CS, Product, Sales) to inform strategy and improvements.

Tools: Enabling Proactive & Efficient Work

Effectively leveraging the right tools automates routine tasks and provides insights for proactive engagement.

- **Utilized Customer Success Platform (CSP)**
 - **Target State:** The CSP is the central hub for managing customer interactions, health, and workflows, enabling proactive interventions and efficient portfolio management.
 - **Steps to Reach Target State:**
 1. Ensure you are fully trained on your company's CSP.
 2. Consistently log your customer interactions, notes, and activities in the platform.
 3. Utilize features like health scores, task automation, and playbooks within the CSP to manage your day-to-day work.
 4. Explore advanced features that could help you be more proactive (e.g., setting up alerts based on usage changes).
- **Integrated Data Sources (CRM, Support, Product Usage)**
 - **Target State:** Key customer data from different systems (CRM, Support, Product Usage) is integrated and easily accessible, providing a unified view for proactive insights.
 - **Steps to Reach Target State:**
 1. Understand where customer data resides in your company's tech stack.
 2. Learn how to access relevant data points from different systems (even if they aren't fully integrated).
 3. Advocate for better integration of tools to create a single source of truth and enable more powerful proactive triggers and insights.
- **Automation of Routine Tasks**
 - **Target State:** Repetitive manual tasks are automated, freeing up CSMs' time for high-value, proactive activities.
 - **Steps to Reach Target State:**
 1. Identify your most time-consuming manual tasks (e.g., sending standard emails, data entry).
 2. Explore if your existing tools (CSP, CRM, email platform) have automation capabilities for these tasks.
 3. Work with CS Ops or your manager to set up automation rules or workflows where possible.
 4. Actively look for new opportunities to automate based on your daily work.
- **Accessible Customer Intelligence (Analytics)**
 - **Target State:** You regularly access and utilize customer data and analytics to understand behavior, identify trends, and inform your proactive strategy.
 - **Steps to Reach Target State:**

1. Learn which analytics dashboards or reports are available to you.
 2. Understand how to interpret key metrics related to product usage, engagement, and customer health.
 3. Schedule regular time to review customer data to identify patterns, celebrate successes, and uncover potential issues before customers report them.
- **Empowering Self-Service Resources (Knowledge Base)**
 - **Target State:** A comprehensive and easily accessible knowledge base or help center exists and is promoted to customers, deflecting simple questions and allowing CSMs to focus on complex issues.
 - **Steps to Reach Target State:**
 1. Familiarize yourself with the existing self-service resources.
 2. Actively guide customers to relevant articles or guides for common questions during your interactions.
 3. Identify gaps in the existing knowledge base based on customer questions and contribute to creating new content or updating existing articles.

Key Metrics: Driving Proactive Action & Measuring Impact

Understanding and tracking these metrics informs your proactive strategy and demonstrates the value of your work.

- **Value Realization Metrics**
 - **Importance:** Tracks whether customers are achieving their desired outcomes and receiving tangible benefits from your product.
 - **Actionable Step to Use Proactively:** Work with customers to define how they will measure success. Monitor their progress against these goals and proactively intervene if they are off track, offering guidance or connecting them with relevant resources to help them achieve value.
- **Churn & Retention Rates**
 - **Importance:** Direct indicators of customer satisfaction and the effectiveness of retention efforts. High churn signals reactivity; low churn indicates proactive success.
 - **Actionable Step to Use Proactively:** Regularly review churn and retention data for your book of business and segments. Analyze the factors contributing to churn (using the churn analysis SOP) and use these insights to refine your proactive strategies and identify leading indicators of churn to watch for.
- **Net Revenue Retention (NRR) / Gross Revenue Retention (GRR) & Renewals**

- **Importance:** Measures the revenue retained from existing customers, including expansions (NRR) or excluding them (GRR). High NRR indicates successful retention and growth within the customer base, often driven by proactive value delivery and upsell.
- **Actionable Step to Use Proactively:** Understand your contribution to NRR/GRR through renewals and upsells. Proactively identify renewal risks and opportunities for expansion based on customer health, value realization, and changing needs. Initiate renewal discussions early, focusing on demonstrated value and future potential.
- **Product Adoption & Feature Engagement**
 - **Importance:** Indicates how actively customers are using the product and leveraging its capabilities. Low adoption is a key indicator of potential churn and lack of value realization.
 - **Actionable Step to Use Proactively:** Monitor key adoption and engagement metrics within your accounts. If you see low usage of critical features or declining engagement, proactively reach out to understand the reasons and offer targeted education or support to drive adoption.
- **Customer Health Score**
 - **Importance:** A composite metric that provides a quick, high-level indicator of the overall health and risk level of a customer account.
 - **Actionable Step to Use Proactively:** Regularly review the health scores of all your accounts. Prioritize your outreach and activities based on health scores, focusing proactive efforts on at-risk customers or those with high potential for growth. Investigate the factors contributing to score changes.
- **Customer Satisfaction (CSAT) & Net Promoter Score (NPS)**
 - **Importance:** Measures customer sentiment and loyalty. Low scores indicate dissatisfaction that can lead to churn if not addressed proactively.
 - **Actionable Step to Use Proactively:** Monitor CSAT and NPS results, especially for your accounts. Reach out directly to customers who provide low scores to understand their concerns and work to resolve issues proactively. For high scores, identify potential advocates and opportunities for testimonials or case studies.

Is this Survival Kit missing something? Need more depth in this Survival Kit? Don't hesitate to contact me: toni@growthcues.com

