CUSTOMER HEALTH

magazine

Vol. 1

WHAT'S NEXT IN CUSTOMER HEALTH?
FIVE LEADERS HAVE THEIR SAY

BUILDING STRENGTH WITH A **COMMUNITY-LED APPROACH**

IS **JACKIE WOGAN** THE STRONGEST WOMAN IN CS?

+

KRISTI FALTORUSSO
BRIAN LAFAILLE
ANIKA ZUBAIR

Nothing "meh" about

NICK MEHTA

InSided's Remco de Vries talks customer health and creating good habits with the biggest name in CS

MAKE
YOUR
MOVES
WITH
CONFIDENCE

NEVER SWEAT CUSTOMER HEALTH SCORES AGAIN

CUSTOMER HEALTH

magazine

Editor's letter

*"I have an idea.
You're going to love it!"*

This is how I usually start my pitches to my boss and inSided's VP of Marketing, Remco de Vries. Each time, he's equally terrified. This time was no different. While he took some time to process my (undoubtedly) genius idea, I simply did what I always do: I ran with it. Luckily, I'm backed by the most amazing content team, three insanely talented women who are always up for a new challenge.

So here we are. A few months down the line, with the first-ever edition of Customer Health Magazine hot off the press. It's jam-packed with interviews, insights, and magazine must-haves such as horoscopes and readers' opinions. And let's not forget about our inaugural cover model, the one and only: Nick Mehta. It only seemed fitting to put the poster boy of customer success on our very first cover. Striking pose after pose to a Taylor Swift playlist, he fully embraced the fun and the chaos during the hour and a half long photoshoot we managed to cram in during his Amsterdam visit back in March. Make no mistake when I say this man truly embodies Gainsight's values – especially child-like joy. Get to know him better on page 36.

Now, let's talk about health. Because "health" can be a loaded word. A word that in recent years has been reevaluated and redefined for many of us. It goes so much deeper than the (not-so-well) aging view that health is the absence of disease. I think what we've all finally learned is this: health is personal. And the same goes for our customers. They have different needs and different paths to success, just like we do.

So in this first issue of Customer Health Magazine, we hope that we can inspire better habits, and with that – healthier, happier customers.

I hope you'll enjoy it!

JOHANNA JOHANSSON
Editor-in-Chief

CONTENTS

36

A THING CALLED CHURN

InSided's Remco de Vries met with Nick to talk about his path to customer success, customer health, and creating good habits.

44

IS JACKIE WOGAN THE STRONGEST WOMAN IN CS?

InSided's Hannah Whalen met with Jackie to talk about her path to customer success and how she puts the "health" in customer health.

52

WHAT'S NEXT IN CUSTOMER HEALTH? FIVE LEADERS HAVE THEIR SAY

With the shift towards a digitally-led engagement model and the continued focus on high engagement, making sure health is aligned will be key.

12

BUILDING STRENGTH WITH A COMMUNITY-LED APPROACH

If you're wondering what many SaaS-superstar companies like Figma and Atlassian have in common, it's a community-led approach. Here's why.

VOICES & COMMENTARY

We've rounded up the hottest takes, thoughtful predictions and insightful commentary across community, customer health and more.

Joergen Aaboe
Marketing Leader on Sabbatical | Strategist & Practitioner | SaaS + Web3
2mo

This one might hurt, but here it is: We're grossly overestimating our collective ability as marketers to grow business through community.

Let's be clear though:

It's not that building community isn't a viable strategy. It's just that it's so much harder than the conversation around community-led growth has suggested to date.

But I think this is the year we realize and accept how hard it actually is.

Yup, another one of my underwhelming 2022 predictions. You're welcome!

I'm far from an expert on community-based marketing, but I'm just not willing to underestimate what it would take for your typical marketing team in B2B SaaS to establish and maintain a thriving community of highly engaged buyers.

Especially those who aren't just marketers marketing marketing stuff to marketers. It's a little easier in that world.

Like, which companies are actually getting the majority of their growth from a community they've built?

And what percentage of companies is that? Less than 1%, right?

All that being said, I'll leave you with these two final little opinions in case you care:

1. I do actually think it's worth trying if you truly believe you have it in you as a company

2. We can learn the most valuable lessons about community from what's going on in web3

Curious what the community thinks about this :)

#b2bmarketing #2022predictions

Niclas Ramon Staberg
Operating Advisor at Verdane | Customer-Led Growth | SaaS | GTM | Always Happy to Help |
2w

Loving your product is great.

Loving it too much is dangerous.

It can result in product narcissism.

Whilst not an official definition, product narcissism could be described as an unhealthy and false perception of the value a product provides to a company's customers.

Why it's dangerous:

→ It fosters a culture of confirmation bias
→ It actively excludes real customer voice
→ It confuses innovation in the company
→ It ruins customer experience over time
→ It destroys the possibilities of scaling

How to prevent product narcissism:

1. Start capturing customer voice
2. Include it in your decision making
3. Make it available across the company
4. Verify value with every customer
5. Close the customer feedback loop

After all, a product is never better than the value customers experience from using it.

So put more love into understanding that instead of loving your own product too much.

Rosie Sherry
Community Executive Officer
1mo

LI think everyone should be forced to start a community.

It might even make a great TV show.

This would really help combat the 'community is the answer, is so very easy and we can build it in 30 days' syndrome.

Incase it's not clear, let me explain...

1. Community is not marketing
2. Community is not sales
3. Community is not a quick fix
4. Community takes time to build
5. Community is a long term investment
6. Like businesses, most communities fail
7. Community involves juggling so many things
8. But mostly, community is hard, draining and often leads to burnout

The reality is that often community isn't the right thing for your company, or if it is, it will end up looking very different from what you expect.

If you believe in community, invest in it and your community team.

Ambika Pai
Chief Strategy Officer at Mekanism
3w

Probably TMI and too honest for a professional platform, but I opened LinkedIn and saw a prompt to share my tips on work-life balance. I am a CSO and a toddler mom, and I'm at a complete loss.

The last few weeks I've been feeling shades of "I can't do this anymore" every single day. I've felt on the verge of sacrificing a career I love and have worked so hard to build because I don't know how to keep up anymore. It's been an especially hard few weeks between being sick, having a sick daughter home from daycare, managing multiple high priority meetings, trying to preserve my team's time off, and ensuring they're taking their sick days (because everyone should and I'm setting a terrible example by not), all while trying to manage the nausea and exhaustion of pregnancy, which I haven't openly talked about until now (another fun one for us to dig into sometime).

What I want to know, is how other people, other mothers, other executives with teams and organizations that heavily depend on them, do this. And not in the *how does she do it all?* doe-eyed way. In the how the fck are yall managing sort of way, because as I said above, I'm at a loss. And I have the privilege of having access to mental health support, a partner who shares the load, an organization that knows what it's like to manage work and life simultaneously. I'm still on the brink.

And I don't want to make this about being a woman or mothers, but I see - crystal clear - why so many of us stop short of our professional potential. Why "success" is so elusive. Why we end up turning down jobs that would catapult us. Because most often, success as we know it, is built on the back of standards that were built for men (or people with generational wealth who can hire full-time help at home #kimkardashian). Because not all of us are willing to let work supersede the ways in which we want to work/ live, where we want to put down our roots, the parents we want to be for our kids when both parents/grownups are working. And when work doesn't supersede it all, who are we to be successful, right? If we're not willing to grind, hustle, go hard, are we not deserving of success?

We're not going to be able to address things like "work-life balance" until we address something far more fundamental than that. How can we set people - all sorts of people in all sorts of scenarios - up to succeed?

#MentalHealth #work #success #career #leadership
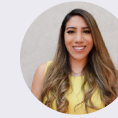
Erika Villarreal
Top 100 CS Strategist | Customer Success addict @ Condeco
1mo

A perfect health score does not necessarilly mean a happy customer.

A perfect health score means the customer is meeting what YOUR COMPANY measures as success.

But customers might have a different definition of success.

Here's an example:

To Condeco, a successful customer might mean the customer is increasing their workspace bookings. More personal spaces or meeting spaces being booked. (Simple example)

But to the customer, success might mean being able to reduce their footprint.

Less real estate space = Less money to be paid.

If the customer does not meet their business outcome, even if our measure of success is perfect, they will be unhappy.

Business outcomes matter. Health scores are just leading indicators that guide you.

Make sure you're using other tools (success plans for example) to guarantee business outcomes being met and you'll be sure to have a happy customer.

Health Scores by themselves... might not be the full picture.

Coleen Bachi
Director of Customer Success at Hotjar
4w

When you're trying to build your Customer Success program at a Product Led Growth company, it's easy to get caught up in trying to do it all. It wasn't until we stripped away all of our 'areas of ownership' as a team and started from the beginning that we saw the impact we had been seeking.

Here's my best advice for the "first" thing you do:
Start small, and at the beginning. If it means that your "onboarding" program is a glorified product demo, do it anyway! You learn the most by taking calls with customers. Just make sure you document your learnings and schedule time to zoom out.

[Link in comments]

#customersuccess #onboarding #productledgrowth #growth

IT'S A NUMBERS GAME

DIGITAL-DRIVEN ENGAGEMENT AND A COMMUNITY-LED POST-PANDEMIC FUTURE
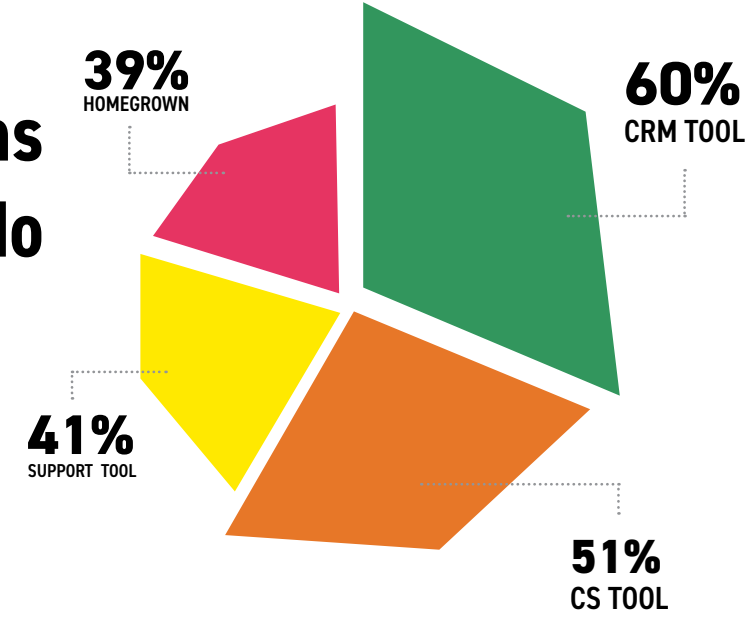
By Johanna Johansson

London

Paris

New York

San Francisco

Chicago

What applications and tools do you use to manage customer success?

39% HOMEGROWN

60% CRM TOOL

41% SUPPORT TOOL

51% CS TOOL

Observations

Great investment in multiple Digital tools. CS platforms are now a common practice complimentary with CRM tools. Use of a dedicated customer success platform has increased from 44% in 2019 to 51% in 2022.

no.1 SLOW AND STEADY WINS THE RACE

Perhaps slower than expected, but the use of dedicated customer success software is steadily increasing, going from 42% in 2019 to 51% in 2022 according to TSIA Customer Benchmark Data.

no.2 EXPANSION PLANS? WE GOT IT

In the last few years, CS orgs have taken on more direct revenue responsibility. The trend has grown significantly and CS is now in charge of expansion 61% of organizations – a jump from 42% reports TSIA.

no.3 EVER WONDERED WHAT'S IN IT FOR YOU?

$250,000. That's what's in it for you. If you're a Director of Community, you're in the big leagues. Check out Community Club's open repository of community salaries to get an idea of what your bank account could look like in a community-led future.

no.4 LOCATION, LOCATION, LOCATION

The top five locations for CS jobs shouldn't have anyone complaining. From the streets of Paris to Chi-town and California, where are you headed for your next role in CS?

no.5 ...

Speaking of location. According to GitLab's The Remote Work Report 2021, 42% of companies have a hybrid-remote work policy.

42% HYBRID-REMOTE WORK POLICY

"IT'S JUST A MATTER OF TIME BEFORE COMMUNITY GETS A SEAT AT THE TABLE.

no.6 THE GREAT RESHUFFLE

There were 10.6m job openings at the end of November and 6.9 million unemployed people – 1.5 jobs per unemployed person. The number of quits hit a new high of 4.5m. A stern reminder to recognize and value your employees. Times are a changin' – employees are more powerful than ever.

no.7 PULL OUT A CHAIR, PL-EASE

It's just a matter of time before community gets a seat at the table. Community ops company Commsor reported that in 2020, 41% of pre-seed through Series A, 67% of Series B+, 84% of IPOed, and 70% of privately held companies had a dedicated Community team. Fast forward to 2022, and those numbers have grown to 79%, 95%, 94%, and 83% respectively.

4.5m. QUITS

BUILDING STRENGTH WITH A COMMUNITY–LED APPROACH

WHY COMMUNITY IS THRIVING IN ORGANIZATIONS

By Becky May

If you asked anyone a decade ago what community-led meant, you'd probably be met with blank stares. Flash forward to 2022, SaaS-superstar companies like Figma, Asana, and Atlassian all have one thing in common: a community-led approach. Communities allow Customer Success teams to scale, get real-time feedback and insights into customer needs, and most importantly, they give customers a voice. Within your company, your community can teach you about what customers want to see from your product, how you should craft your customer communications, source new prospects

> ## A LOT OF COMPANIES ARE USING THIS AS THEIR MAIN TALKING POINT WITHOUT UNDERSTANDING WHAT COMMUNITY-LED ACTUALLY MEANS

for your product, and find people who are a great fit to work for your company. The list is endless, but one thing is for sure, community-led is becoming the norm. Why? Because it's giving power to the people, and by doing so, it enables teams to create better paths to customer success – on the customer's terms.

Last year, a reported 22% of organizations increased community teams in the past two years, according to Commsor's 2022 survey. Of the companies surveyed, 25% have community represented as an executive-level role. Not only is community being valued within companies as a revenue driver and being added into the executive suite, but it's also driving how companies are shaping their retention and expansion strategies.

"A lot of companies are using this as their main talking point without understanding what community-led actually means," says Hubspot's Senior Manager of Diversity, Equity, Inclusion, and Belonging Communities, Shana Sumers. The Chicago-based community manager has been building and managing communities for six years and knows that being community-led is more than a buzzword or lip-service to your customers. "Community-led is putting community at the center of your business knowing that community can work cross-functionally to help accomplish business goals. As witty as your marketing campaign is, it can never top a word-of-mouth recommendation from another customer. As fast as your customer support is, some customers will always prefer self-service and finding the answers to their questions immediately."

Ideally, you'd be able to build your business alongside your customers with this community-led approach in mind from

the jump, but that's not the case for many companies.

Positioning community as the focal point can be a challenge given the history of community in many companies has been siloed off. Creating a culture of cross-functional collaboration and making sure your OKRs and initiatives are aligned to the company's are two key building blocks to creating a community-led approach.

You may be one of many communities whose main function started as a help forum or a way to minimize support tickets

> ## COMMUNITY-LED IS PUTTING COMMUNITY AT THE CENTER OF YOUR BUSINESS KNOWING THAT COMMUNITY CAN WORK CROSS-FUNCTIONALLY TO HELP ACCOMPLISH BUSINESS GOALS.

SUPPORT
- *Educate members to help troubleshoot together and reduce caseload*

MARKETING
- *Craft targeted messaging and better understand what audience to go after*
- *Create valuable content based on conversations or reading what people are talking about*

SALES
- *Help them craft outreach within community or outside*
- *Build relationships with potential customers and warm up the leads for them*

PRODUCT
- *Faster research for product direction*
- *Customers are more likely to stick with the product and higher retention if their feedback is heard*
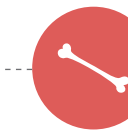
LEADERSHIP
- *Learn from loyal and unhappy customers on where they want to see the company grow*

RECRUITING AND HR
- *Find community members who are already familiar with your product, love it, and would be a good culture fit*

Like the heart, community benefits and impacts all parts of the organizational body.

"

WE BELIEVE THAT 100% OF SUCCESSFUL NEW SOFTWARE COMPANIES WILL ENGAGE THEIR COMMUNITY FROM THE START, AND CONTINUE TO BUILD ON THAT ENGAGEMENT THROUGH THEIR GROWTH.

for customers, so how do you elevate this space to become a hub for prospects, engagement, networking, and more?

When Angie Coleman came to cloud-computing company Snowflake back in 2018, she found herself in this exact position. Over her first year as a community manager, she built out the existing blog from generic help content with trending topics and created a referral and advocacy program. Once she had some data on how community was impacting the rest of the company outside of self-service, she took action to reach out to team leaders to get buy-in.

Angie stayed diligent with biweekly meetings with every team from Product, Marketing, Support, and Education to show what the community had produced or achieved for the respective teams and also see how the community could support their initiatives. "I think getting buy-in isn't always by necessarily going directly to the CEO or the organization head, but by working with the smaller teams in the company."

In addition to having meetings with every team, goal-setting with those teams is important to track the success and progress of community-driven efforts. Mary Shen O'Carroll is Head of Community at leading digital contracting platform, Ironclad. Although she admits she was lucky to walk into a company that understood the value of community, she reinforces that value with specific KPIs linked to other teams as well.

"We just set our goals for the year and we're

making goals that are in tandem with the Product, Customer Success, Marketing, and Sales organizations. So, we're all very aligned in why we're here and what we want to do. There's plenty of work to go around. How can we all pitch in and help each other achieve what's best for the company?"

Now, when you're trying to get buy-in at the executive level, you need to prioritize the right metrics to make your case. The metrics for a social advocacy community may look different than those for a product community, but some baseline numbers can work for any type of online community to show its strength such as the number of members, posts, comments, DMs, likes, and new customers, or event attendees. There are also user-generated metrics, which albeit are a little more challenging to rank, but should be considered like shareability, uniqueness, comprehensiveness, and the evergreeness of the content or post.

Unqork's Director of Community, Danny Pancratz finds the numbers that speak the most are the ones that aren't there. "When it comes to ROI, our first instinct is to look at what community members are doing. How many logins, questions, ideas, and conversations are taking place? It's often helpful to look at what community members aren't doing. Are they creating fewer support tickets? Are they sending fewer emails or asking fewer self-service questions on calls with their CSM? A strong online community should level up the interactions that both Customer Success and Support teams can have with customers. If you have a strong knowledge base and active community forums, you enable self-service for the 'low hanging fruit' and focus everyone's time on higher-value conversations. InSided offers some great analytics for this based on Zendesk benchmarks for how community activity correlates to support tickets."

If you're not sure whether something is "working" in your community, then pivot. But resist the knee-jerk reaction of wanting to "tell" your community what they should want. You should empower them to tell you. Community by Association founder Marjorie Anderson suggests trusting in your community to let you know what they think. "Try something for 90 days and see if it works, because I think that's the bare minimum time it's going to take for people to really kind of see if it makes sense if people are going to adopt it because community building takes time." Marjorie has an impressive track record of building a community from the ground up. What started as a blog post here and there transformed into a full-fledged company that offers everything from strategy reviews, community audits, and leadership alignment sessions.

The good news is that as community matures and evolves in organizations, so does the technology and talent to support it and removes some of the guesswork on what your community wants and

needs. One shining example of that comes from what Linda Lian has built with Common Room. The Seattle-based startup was founded from Linda's need for a more effective way to share community ideas and have the proper way to track and manage these types of dialogues. Her approach to community-led growth is that it should happen right out the gate. "We believe that 100% of successful new software companies will engage their community from the start, and continue to build on that engagement through their growth. We see this trend most strongly in Web3, where the community leader is one of the first hires or the role is taken on by one of the members of the founding team."

The recognition of community whether in the C-suite or as a department is also ushering in a new class of younger individuals ready to dive into a career in community vs. falling into it by happenstance which many have done. Qiana Pierre is a junior at Mount Holyoake College in Massachusetts. She realized her experience in UX and being a Community Member Experience Manager helped her path to community management. Qiana is only, at the moment, an intern but helps manage #HireBlack, a 3,000-member community for black professionals looking to network. She has yet to graduate from college, but can already identify the most valuable part of communities early on in her career. "We believe that wealth is defined by access rather than assets. It's critical for me to cultivate relationships within our network in order to share experiences, provide resources, and a safe space for empowerment and professional development."

Regardless if you're company is a SaaS startup with a community-led approach, a company overhauling from a product-led focus to a customer-centric strategy, or someone just starting in the community field, you know that the value of community is rooted in giving back power to the people and letting them steer your business in the right direction. So when you're trying to argue for that additional community headcount or the tooling to scale your community efforts, go to your leadership confidently knowing that community is not a trend that will come and go, but be the foundation for any successful company in the future.

"

WEALTH IS DEFINED BY ACCESS RATHER THAN ASSETS.

inSideditin
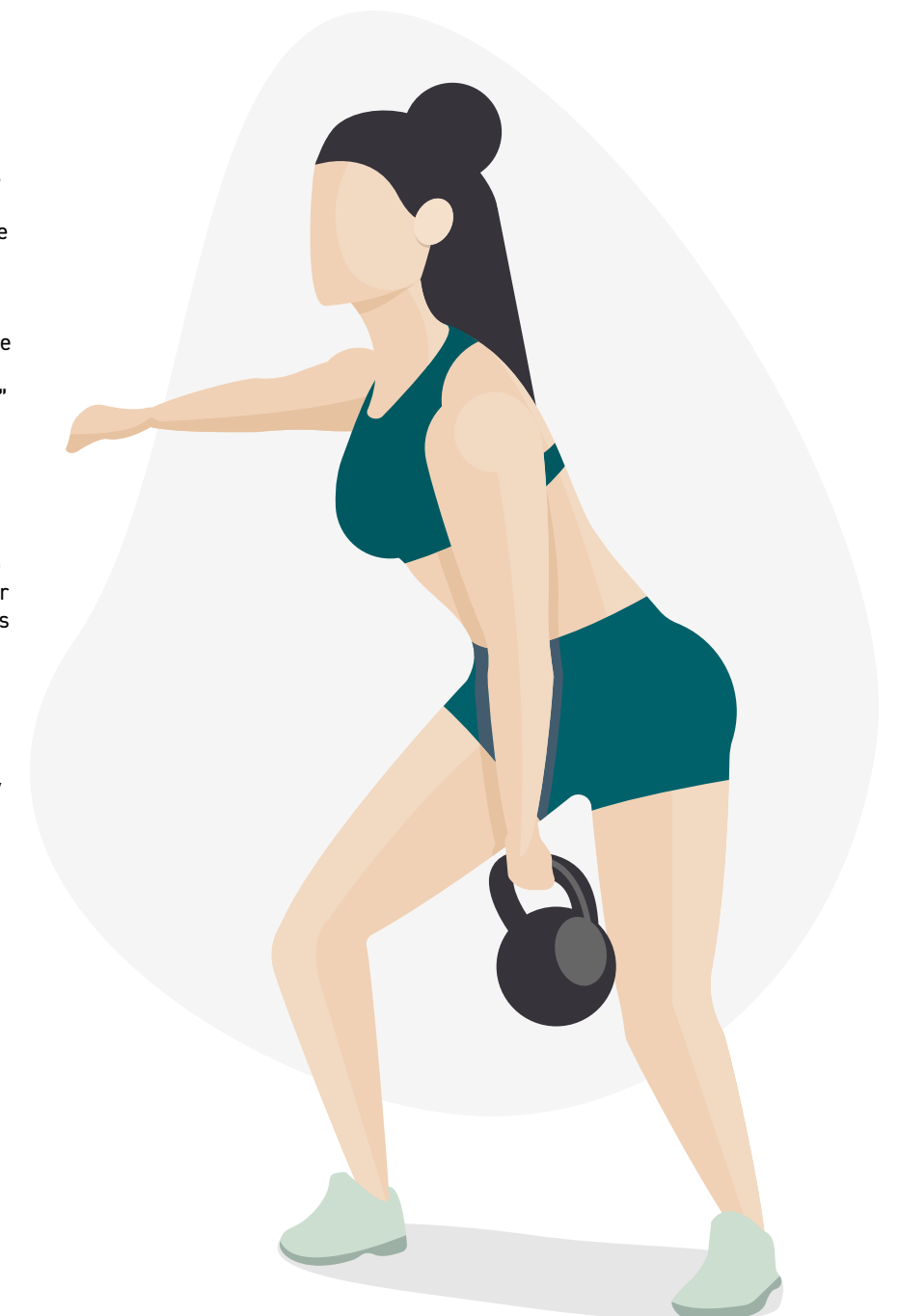
Can you smell the upsell?

The CS community management solution to all your problems.

✓ CS TESTED AND APPROVED.

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100% ORGANIC
PREMIUM QUALITY
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10 COMMUNITY MANAGERS AND HOW THEY WIN

By Becky May

From one of the biggest CRM companies to a collective of tech investors and founders, we've interviewed 10 community leaders who cracked the code on how to foster and build successful and engaged communities. Get to know their stories and best secrets on winning over executive teams and community members.

Angie Coleman
Director of Community at Operator Collective

About Angie: Angie has nearly 8 years of community experience ranging from B2B products to peer social groups. Currently, she is spearheading the global community for enterprise tech operators in venture capital. Prior to joining Operator Collective, she helped grow Snowflake's community membership from 7,000 to 35,000 in less than two years. Even outside of her professional community career, Angie loves being an active member of local QPOC, LGBTQ+, and techie communities by creating engaging event series that allow for deeper networking and personal growth.

Biggest win: "Snowflake's Data Heroes Advocacy Program was a huge win because not only did I get to bring that program to life but it also just became this world-class type project that other companies are modeling after it. [...] People are also getting jobs because they have participated in the Data Heroes program."

How she executes: "I call those like my five E's, so every community should educate. Every community should enable. Every community should engage. Every community should expand, and every community should evangelize. I kind of use that as a very loose framework as I'm building out my programs."

Shana Sumers
Senior Manager, Diversity, Equity, Inclusion and Belonging Communities at Hubspot

About Shana: Like many, Shana didn't intentionally get her start into community right out the gate. The former music therapist's path into community started as a community member herself, trying to build relationships in a new city on the HER social app. Her super user status turned into the entrypoint for her career move into tech. While she was at HER, she started the Bad Queers podcast, helped rebrand for more inclusivity and built up its overall membership. Now at Hubspot, Shana focuses on building a community for black professionals called Black@INBOUND, which she hopes will be the framework for other communities in the future.

Biggest win: "It would definitely be between launching my podcast Bad Queers and launching the Black@INBOUND Community. Launching Black@INBOUND was not only proof of my skills and abilities - it also proved that I made the right decision in moving forward from HER (a startup) to a large corporate company and still be able to make a difference with communities that I care about."

Best piece of advice: "Make sure you're putting diversity, equity, inclusion and belonging at the forefront because that is the number one thing that is going to help your community and allow more people to feel like they belong in your space, which is the overall goal for what we're doing."

> **MAKE SURE YOU'RE PUTTING DIVERSITY, EQUITY, INCLUSION AND BELONGING AT THE FOREFRONT**

Scott Baldwin
Community Lead and Product Evangelist at Productboard

About Scott: Scott has more than 20 years of product management experience. Although his time as a community lead at Productboard is relatively fresh, he has been an active member of his own community and other product-led communities for years.

Biggest win: Proudest moment personally has likely been becoming a father. Professionally, being part of two product orgs that have grown to become unicorns.

How he executes: "We built community ultimately with people, not for people, so if you think like a really bad product being built, that's a product that gets created without interaction with the customer without their input, without that co-creation. A bad community kind of goes down the same path, right? It's just like, you know, here's a bunch of things you can do in our community versus, how can we help you?"

Mary (Shen) O'Carroll
Chief Community Officer at Ironclad

About Mary: Mary has never been shy about exploring uncharted territory. Thirteen years ago, she helped Google build and lead its legal operations team at a time when legal ops was an emerging field. Her experience of shared knowledge and best practices via other companies motivated her to establish a global community of corporate legal operations professionals called CLOC (Corporate Legal Operations Consortium). Currently, she is the Chief Community Officer at the number-one contract lifecycle management platform, Ironclad. Mary is passionate about establishing scalable processes and paving the way for digital-first general counsel.

Biggest win: "We got everything up and running very quickly. Our online forum didn't exist before and we spun it up in 90 days. Our engagement is about an 82% peer-to-peer response rate. In terms of community-led growth, we're seeing how much community is actually influencing our close rates, pipeline and our brand building."

How she executes: "We really talk about making them [community members] heroes. I think when you make them a hero and they

> **THE GOAL WILL BE TO EMPOWER THESE GROUPS AND HAVE MORE AUTONOMY AND FOSTER CREATIVITY AND HAVE THEM MOLD THEIR VISION OF COMMUNITY**

feel supported in all parts of their job by the customer success team and now by the community. They're heard with the product feedback and they want to associate with you. That is going to lead to loyal advocates, who want to participate in a webinar or write a blog or create content."

Alex Angel
Chief Community Officer at Commsor

About Alex: After graduating with a degree in astrophysics, but being in the midst of the recession, Alex decided to take on a role at Reddit. After nearly five years of listening to community members and moderators within the platform, she realized there was a natural move from community management into product management. Alex has worked for brands ranging from Stumptown Coffee to Nike and now holds a seat in the C-suite as Chief Community Officer at Commsor.

Biggest win: "I'm most excited for and proud of Commsor's C-School. Noele Flowers is the lead and we've been working closely together on the vision and where we want to take it. It's been exciting seeing so many people sign up who have no prior experience, and who are getting their first jobs in community. And seeing people who have been in the business for a decade but have never really had the training or support or camaraderie finally get that support. Having been through a lot of this myself working as a solo contributor or in a super small team and being under-resourced or under-valued, I wanted to help people advocate for themselves and feel supported and empowered."

Best piece of advice: "My best advice is don't give up hope. If you are just starting out and you are getting [a community] off the ground and it's taking forever and you feel like you are talking to the void, there will come a time where that won't be the case. People will be engaged and active, but often it takes a while.."

Katie Ray
Head of Community at Clari

About Katie: This year's CMX'er of the Year, Katie Ray, has been making her mark in community ever since she pivoted from sales in 2020. The Clari Community Manager, has utilized her relationship building skills from her sales experience and used it for community growth and engagement.

How she executes: "Nisha Baxi, who is another inSided customer, and I have chatted about in the past is, any type of program that you do, make sure you're testing. Set up parameters around what this type of success is. How long are you going to test until, you know, you're going to just kind of keep it as is? I think for figuring out if something's going well or if things aren't going well, testing is so important. A lot of times we talk about company culture and we talk about how to keep employees happy. Same thing in a community. You have to create a community culture."

Biggest win: "My absolute biggest win was the CMXer of the Year award this year. [...]vIt was really, really nice just to have that recognition and see that all my hard work and research and conversations and relationships are paying off."

Linda Lian

**Founder
at Common Room**

About Linda: Linda's first foray into the power of community was as a junior investor at an early stage VC fund, where she had the opportunity to dive deep into the trends that are fundamentally re-inventing the way that software is built, distributed, and adopted. She was particularly interested in the rise of user- and developer-led adoption within product-led growth, developer services, and commercial open source companies—all driven by strong communities. Linda then had a chance to experience this trend firsthand, leading product marketing for serverless computing at AWS. There she was charged with overseeing and growing a great community of developers, and realized there was a huge need for tooling to enable, support, and manage communities. This discovery led her to found Common Room..

Biggest win: "My proudest moment so far is recently launching the general availability of Common Room, which was the culmination of a great partnership with our own community. We gathered a group of top community leaders and developer advocates (DAs) before we ever wrote a single line of code. Some of our best customers today are those who have been with us on the journey for almost two years now. They saw the first product designs in Figma to now doing 100+ seat deployments of Common Room to cross-functional stakeholders that partner closely with community and DA teams like customer success, product, and revenue teams. Our community has pushed us every step of the way in how we build our product, ensuring we address the problems they want to solve for their users and their teams."

How she executes: "To be successful in increasingly competitive and noisy spaces, companies today need to be more than just their software. They need to shift from being a platform of "services" to a platform of "economic opportunity" so that their community members can advance their skillset, their visibility within the ecosystem, and ultimately their careers. We often hear of community and product champions who take their tooling from job-to-job, and the best community-led companies take pride in supporting and enabling their community members throughout that member's personal journey, regardless of where it may take them."

Marjorie Anderson

**Founder
at Community by Association**

About Marjorie: Marjorie is no newcomer to community. She has been in the space for nine years. Although she wasn't quite sure what community management looked like back then, she was ready to stretch her skillset and bring her customer care experience to the next level. Currently, she is the manager of a one-million plus online community at Project Management Institute and is also the founder of Community by Association.

Biggest win: "The specific challenges that I was facing inside of a membership association weren't necessarily being addressed. [...] And as people started engaging with my content, there was a community that came out of that for people who were building community in associations and nonprofits. Then in 2020, I formed a formal company and offered consulting services to association and nonprofit community builders and leaders to ensure that the approach to building community is sound and that it is set up strategically to, to succeed."

How she executes: "What I have seen and experienced is that associations tend to lean on technology versus on strategy. And so my goal for Community by Association is to ensure that flips and these association leaders and people who are building community spaces are leaning on strategy using technology to support."

> **"TO BE SUCCESSFUL IN INCREASINGLY COMPETITIVE AND NOISY SPACES, COMPANIES TODAY NEED TO BE MORE THAN JUST THEIR SOFTWARE.**

Sofia Rodriguez

**Director, Community
at Venafi**

About Sofia: Sofia has been active in communities in forums and guilds as soon as she remembers getting on the internet. But her first paid community role was in education overseeing in-person events and eventually, moved to education technology. It was there that she realized community was the path she wanted to pursue and wound up at Salesforce. She managed the Trailblazer Community and the following programs: Community Groups, Salesforce MVPs, and Community Conferences and was Global Vice President of Latinoforce, an Equality Group. Currently, she is the Director of Community at Venafi.

Biggest win: I see achievement as overcoming a new challenge or learning something new. I've had my hand in designing and managing new community programs, events, and initiatives and scaling existing programs, but launching a full-blown enterprise community for the first time was like a unicorn to me. So I consider it a huge professional win to have launched an online community for a niche segment. From owning the community and engagement strategy, platform selection, and community architecture, to the manual tasks that included welcoming new customers and educating employees on the value and potential impact of community, it was a constant effort and adrenaline rush. Launching something new is a beast on its own which can increase feelings of imposter syndrome, but also forces you to believe in your own worth and ability.

How she executes: I'm in my year of focus. This has carried over to my approach to community strategy. I am constantly tempted by new ideas and want to bring them to fruition but focus is key. I want to make progress in one direction instead of going around in circles. If you're on a bike, you move farther by pedaling one direction, instead of making a turn, then a turn, then another turn – you end up where you started! Do one thing really well, show success, and then move to the next thing.

Wesley Faulkner

Head of Community at SingleStore

About Wesley: Wesley has always been the perfect fit for developer relations even before he knew what it was. The first-generation American majored in computer and electrical engineering. He discovered his passion during his time at Dell and worked his way up from troubleshooting user error tickets to flying onsite to fix critical systems for companies including Nasdaq and Boeing. He's also dabbled in social media and community management for the software company Atlassian, and various roles for the computer processor company AMD. Wesley currently is Head of Community at SingleStore, and co-hosts the dev-rel podcast Community Pulse and serves on the board for SXSW.

Biggest win: My biggest professional win was creating internal communities at SingleStore to further embed collaboration into the DNA of the company. There are nine groups in total focusing on blog posts, social media, meetups, and more. The members of these groups are composed of employees from different departments and tiers of leadership all joined by their passion and interests.

How he executes: "The goal will be to empower these groups and have more autonomy and foster creativity and have them mold their vision of community. You'll lose control but foster more innovation. The role of the community manager isn't to tell the community what to do but pass on some of those controls to specific groups in the community to champion."

> **I'M CONSTANTLY TEMPTED BY NEW IDEAS AND WANT TO BRING THEM TO FRUITION BUT FOCUS IS KEY.**

7 ACTIVITIES TO BOOST COMMUNITY ENGAGEMENT

By Becky May

Community engagement is not created overnight. It takes time and dedication just like any other fitness goal. Here's seven ways to build your online community strength.

BLOG BURPEES

Content doesn't have to come in the form of blog posts, but it can help you inform and educate those in your community who aren't willing to read a whitepaper but are looking for a deeper dive than a simple tip or two.

LEADERBOARD LUNGES

Put your community members to the test and see who is the most engaged. Reward your members with badges to encourage competition

Why assume what your community wants to know, when you can just ask them? Create Create an ongoing ask me anything (AMA) series that allows your users to get answers to the burning questions they have.

AMA ABS

SPOTLIGHT SQUATS

Featuring your community members not only gives recognition to those in your community, but it helps people get to know who else is interested in the same causes as them.

CHANNEL CHEST PRESS

If you're looking to grow your community muscles and expand the numbers, you'll need to promote it. Utilize your channels with the most reach: email, social media or events. You can even utilize your current community to spread the word in exchange for rewards.

PARTNER PUSH-UPS

Influencer marketing isn't just for B2C. Utilize those who have large followings or niche followings in a related space to help you spread the word. It doesn't have to be a million followers, think of micro influencers! Those will be easier to approach and help you find the exact group of people you want to attract.

DATA DEADLIFTS

Community metrics help us to keep a finger on the pulse of our communities and determine the health of our members. Bring community data into your customer health scores to create a more holistic picture of customer health.

DAY IN THE LIFE OF A CUSTOMER SUCCESS MANAGER

Ever wondered what life as a CSM is like? InSided's superstar CSMs, Julian Lindhorst and Kenneth Refsgaard, shared what a typical day looks like for them.

8.45-9.00: Enjoy the calm before the storm accompanied by a fresh brew.

9.00-9.15: Look at Slack notifications to see if anything is on fire. If in the clear, move on to Gainsight. Any CTAs (call-to-actions) that need urgent attention? Any health scores on red? A renewal that needs planning?

9.15-9.30: Check emails and calendar. Any customer meetings that require preparation? Any quick replies to get done straight away? Open the emails which spark interest/are urgent and then mark them as unread again.

"I like to always be up-to-date with Slack and email so that I can quickly react to internal and external requests that have a high priority. My customers love that they usually get a very quick response if the topic is urgent. I also check in on what my customers are doing in our community to get more insight into their current sentiment and overall health."
— Julian Lindhorst

9.30-9.35: Another batch of coffee. (Actually, make that until 9.45.)

9.45-10.00: Prep for the first customer meeting. Check Gainsight again. How's the health score? How's adoption going? Any open Zendesk tickets? What did we agree on in our last call, again? Oh yeah - we'd review the new success plan today!

10.00-10.45: Customer meeting. Another happy customer ready to rock with their success plan and build a highly engaged community that drives adoption, retention, and advocacy.

10.45-11.00: More coffee and making sure the meeting notes in Gainsight are clear to everyone (not just the CSM).

11.00-11.30: Meet with the Product Manager to get an update on what's happened since the last ideation review. Which features will be added to the product roadmap next?

11.30-11.55: Write a "Day in the life of a CSM" article that Marketing asked for (seriously, what would they do without us?).

12.00-12.35: Coffee and lunch. Make that until 12.45 because lunch is very important.

12.45-14.00: Time to prep for that big EBR. It's going to be one for the books! Lots to discuss, lots to celebrate, and one big thorny challenge to solve together.

14.00-15.30: We are live! EBR time.

15.30-15.40: Exhale. Success!

15.40-16.30: Two more customer calls. All good. The success plans are working and the communities are seeing more members and increased engagement. Notes and actions in Gainsight.

16.30-17.30: Time to wrap up! Final tasks and email follow-ups.

17.30-18.00: Maybe a beer. Make that until 18.15 because CSMs drink good beer and good beer takes TIME.

> ## IT'S SUPER REWARDING TO CREATE HAPPINESS NOT JUST FOR YOUR CUSTOMERS, BUT ALSO FOR YOUR COLLEAGUES.

3 quick ones...

What's something you do as a CSM that you'd like people to know?
It feels like I'm a translator between the company and the customer, communicating in both directions what the other sides' intentions are. Funny enough, I had the very same feeling as a Community Manager. It's super rewarding to create happiness not just for your customers, but also for your colleagues.

Who makes your life easier (other roles or specific people) and how?
I have the pleasure of working with a team that I can escalate to if things are getting too technical/commercial. But it's also a huge relief to have colleagues within the product team who are approachable and willing to join customer calls to give them extra attention when needed.

How do you use community as a part of your strategy?
It massively helps me that I can just quickly go to our community in a meeting and share a guide or product update that will exactly solve what they're trying to achieve. No follow-up is needed where I need to go through each step individually.

3 RECIPES TO KEEP THE MOMENTUM GOING THROUGHOUT THE DAY

THE PERFECT CS COLD BREW

What's a morning without the perfect brew? With warmer temperatures ahead, it's cold brew season. Here's how to make the cold brew to fuel customer success.

PREP TIME	STEEPING TIME	TOTAL TIME	SERVINGS
10 mins	12 hrs	12 hrs 10 mins	3 servings

INGREDIENTS

1 cup (113 grams) whole coffee beans
4 cups (907 grams) water

INSTRUCTIONS

Coarsely grind the coffee
Grind the coffee beans on the coarsest setting on your grinder, or in short 1-second pulses in a spice grinder. The grounds should look like coarse cornmeal, not fine powder. You should have just under 1 cup of grounds.

Combine the coffee and the water
Transfer the coffee grounds to the container you're using to make the cold brew. Pour the water over top. Stir gently with a long-handled spoon to make sure the grounds are thoroughly saturated with water.

Steep overnight
Cover the jar with a lid or a small plate to protect it from dust and bugs. Let the coffee steep for about 12 hours. The coffee can be left on the counter or refrigerated; steeping time is the same.

Strain the coffee
Line a small strainer with cheesecloth or flour sack cloth and place over a large measuring cup or bowl. Pour the coffee through the strainer.

Store the coffee
Transfer the coffee to a small bottle or jar and store in the fridge for up to a week.

Serve the coffee
Dilute the coffee with as much water or milk as you prefer. Serve over ice or warm for a few minutes in the microwave.

NOTES

If you normally have your coffee ground when you buy it, ask for it to be ground on a coarse setting. You'll need a scant cup (or 4 ounces) for this recipe.

You can also make cold-brew coffee in a French press. Steep the coffee overnight, then press to separate the grounds from the coffee. Transfer the coffee to a bottle or jar for longer storage.

Adjusting coffee strength: This recipe makes a fairly strong cup of coffee. To make it less strong (or stronger, if that's what you like!), just adjust the amount of coffee beans to your suite your taste.

THE PRE-EBR POWER LUNCH

Boost your brainpower (and your NRR) with this power bowl. A long customer meeting has never seemed easier to get through!

PREP TIME	COOK TIME	TOTAL TIME
10 mins	20 mins	30 mins

INGREDIENTS

1 medium head cauliflower, chopped into florets*
1 teaspoon paprika
1/2 teaspoon garlic powder
1/2 teaspoon onion powder
Salt and pepper
1 cup farro, or other grain of choice* (gluten-free if needed)
1 bunch kale, chopped
1–2 cloves garlic, minced
2 cups black beans, drained and rinsed
1/2 cup sauerkraut
Sliced green onions or cilantro, for garnish

For Avocado Pesto:
1 avocado
1/4 cup fresh basil, packed
Handful of spinach (optional)
Juice of 1/2 lemon
2 cloves garlic
2 tablespoons walnuts

INSTRUCTIONS

Preheat oven to 400F. Lightly grease a baking sheet.

Place cauliflower florets on the baking sheet. Sprinkle with paprika, garlic powder, onion powder, salt, and pepper. Stir to coat evenly.

Bake for 20 minutes, until tender.

In a medium saucepan, cook farro (or other grain) according to package directions. Transfer the cooked grains to a bowl.

In the same saucepan, heat a little water. Add kale, garlic, salt, and pepper. Cook until the kale is wilted, about 5 minutes. To arrange bowls, add kale, grains, beans, cauliflower, sauerkraut, avocado pesto, and a garnish of fresh herbs.

For the avocado pesto: In a blender or small food processor, add avocado, basil, spinach, lemon juice, garlic, and walnuts. Pulse until smooth, adding a couple tablespoons of water if needed.

THE MID-DAY RETENTION SNACK

INGREDIENTS

Energy ball base:
1 1/4 cups rolled oats you can also swap quick oats or a blend of half quick, half old fashioned
2 tablespoons "power mix-ins" chia seeds, flaxseeds, hemp seeds, or additional rolled oats
1/2 cup nut butter of choice peanut butter is my go-to
1/3 cup sticky liquid sweetener of choice honey or maple syrup
1 teaspoon pure vanilla extract
1/4 teaspoon kosher salt
1/2 cup mix-ins see below for flavor options

Classic chocolate chip:
Any nut butter and honey
1/2 cup chocolate chips

Trail mix:
Peanut butter honey
3 tablespoons chocolate chips
3 tablespoons chopped peanuts
2 tablespoons raisins

White chocolate cranberry:
Almond butter or cashew butter
honey
1/4 cup dried cranberries
1/4 cup white chocolate chips

Oatmeal raisin cookie:
Almond butter or cashew butter maple syrup,
1/2 cup raisins,
1/4 teaspoon cinnamon

In order to retain your customers, you need to retain your energy. Try these energy balls to stay perky throughout email follow-ups and customer calls.

PREP TIME	TOTAL TIME	SERVINGS
10 mins	40 mins	18 (1-inch) balls

INSTRUCTIONS

Place all of the ingredients in a large mixing bowl: oats, power mix-ins, nut butter, sweetener, vanilla extract, salt, mix-ins, and any other spices you'd like to add. Stir to combine. If the mixture seems too wet, add a bit more oats. If it's too dry, add a bit more nut butter. It should resemble a somewhat sticky dough that holds together when lightly squeezed. Place the bowl in the refrigerator for 30 minutes to set (this will make the balls easier to roll later on).

Remove the bowl from the refrigerator and portion the dough into balls of desired size. (I use a cookie scoop to make mine approximately 1 inch in diameter).

4 ESSENTIAL COMMUNITY HEALTH INDICATORS FOR YOUR COMMUNITY

By Julian Lindhorst

With the concept of community health we determine a set of metrics that focus on essential engagement dynamics. They help us to keep a finger on the pulse of our communities and allow us to easily dial-in corrective actions. This is also why we usually touch on those in our regular business reviews with our customers.

In this article we will share four of our favorite essential health indicators that we believe every community manager should be keeping track of when running a B2C community.

FINDABILITY

Online communities are powerful because user-generated content is easily findable through search engines. By looking at the percentage of traffic that is coming via organic search (mostly Google) we get a sense of how the community is maturing in terms of findability through search engines.

Calculation	Source	Benchmark	What to focus on if off-track
% of traffic coming from organic search	Google Analytics (Acquisition > Overview)	+/- 80% for mature communities	SEO optimisation, content curation, content creation

Note

Iif you are driving a lot of direct traffic through amazing integrations this % may be lower and still be perfectly healthy - always consider the broader context when looking at this metrics. For closed communities / Bonus metric: Monthly active users / Monthly active customers

We recognize that the KPI above is not measurable if you have a closed community (set to "private", login required). For this scenario, but also for additional indication of the reach of your community, it might be interesting to see the percentage of monthly active users (or customers). But what do we actually define as active? And which total do we compare it with? Generally speaking, we see different trends in B2B and B2C communities:

B2B Communities usually measure monthly active customers, by checking which percentage of the total amount of customers (of your company) has visited the community last month. Mostly this is not calculated on an individual user level, but rather on the company level - so if three users working for Acme visited, this counts as one active customer. Some even differentiate between key users (e.g. sys admins) and end users (using but not managing your software). While the login is the go-to event to measure it, others argue that merely browsing the community can be counted as an activity, as users actively consume content.

Calculation	Source
% of total customers (ideally % of companies) of your company that visited the community	Login export; Audience Dashboard, Engagement Dashboard (Integration required)

Benchmark	What to focus on if off-track
+/- 60% for mature communities	Integration into customer communication, onboarding, etc., content calendar / collaboration with other departments

B2C Communities usually measure monthly active users, mostly by comparing it to the total amount of registered users. This makes much more sense if your company has millions of end users, or when your community does not happen to play a central role in your customer lifecycle. Here Community Managers simply take the total amount of registered users and calculate the percentage of users that either logged in or visited the community.

Calculation	Source
% of total registered users that visited / logged in to your community	Login export; User Dashboard, Engagement Dashboard (Integration required), Google Analytics (returning visitor %)

Benchmark	What to focus on if off-track
+/- 6% for communities >100k users	Community newsletter, re-engagement campaigns, website / product integrations (links to the community), highlight engaging content on home & topic pages

PEER-TO-PEER SUPPORT

Community members helping other members is one of the key hallmarks of a great community. By looking at the percentage of 'best answers' that have been marked as well as the percentage of these answers that were created by non-employees we have two of the most powerful and direct indicators of healthy peer-to-peer engagement.

Calculation	Source	Benchmark	What to focus on if off-track
% Questions answered % Answered by peer	Success Dashboard	+/- 60% Questions answered +/- 60% Answered by peer expected for a mature community	Gamification, rank notifications, engagement, superuser program

RESPONSIVENESS

One of the worst experiences in any community is creating a topic and not getting a reply. It would also be a huge miss for you if a potential superuser never activates cause he never got a response on her/his first activty. This is therefore also a key health marker and something to consistently keep an eye on.

Calculation	Source
% of topics with no reply	Topics export (and pivot table)
Benchmark	**What to focus on if off-track**
< 5% topics with no reply in a mature community	Moderation diligence and fostering peer-to-peer engagement

ALIVENESS

Everyone has experienced arriving on a community and seeing that nobody has posted in a few days (or longer!). What do you then do? You definitely won't register or start contributing. So it's important to track the level of daily participation in all areas of the community. We do this by looking at the number of posts per day in each category.

Your KPIs and questions

What KPIs do you think are relevant for measuring community health? Please let us know so that we can all benefit from your experience! I can tell you that we even have more of those health indicators in store, so if you'd like to hear more about this, just let us know.

Calculation	Source
Posts per day, per category	Posts export (and pivot table)
Benchmark	**What to focus on if off-track**
> 3-5 posts per day in every category	Drive engagement in quieter categories or reduce the number of categories

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THE SILENT TREATMENT

By Isabel Ruiz

Is there anything worse than the deafening silence of that one customer email that's missing from your inbox? Isabel Ruiz, Customer Education Manager at inSided by Gainsight, shares her best tricks for dealing with the silent treatment.

Crickets. We've all been there. Don't let panic set in. Instead, take some time to reflect. Review the customer's success plan. What happened in your last QBR? Were they on track? Are they enrolled in your digital-led program? If so, have the proper triggers and automations gone out? Did they hit their value milestones? If not, what actions did you take? Don't be afraid to ask yourself the tough questions: did you miss something?

Next, go back to where it all began: the sales cycle. Now, this doesn't necessarily start with sales. For additional context, why not investigate how the customer entered the sales cycle in the first place? Were they an inbound lead? If so, what did their journey as a prospect look like? Were they an outbound lead? If so, find the rep that brought them in. Setting and managing expectations happen before a customer is handed over from sales to CS. Fact. Look at the data, and review the notes in your CRM. Team up with CS Ops or Finance and look at historical data pertaining to the account. Can they identify any trends? Are there customers with similar behavior patterns? This can help you put together an action plan at scale.

Your support team will be able to provide you with insights into the number of tickets that have been opened and resolved. When was the last time they contacted support? Remember: a quiet customer doesn't equal a happy customer. If your customers haven't submitted any tickets during their customer journey, that's a red flag. Lastly, your Product team can provide you with plenty of intel, too. They may have carried out a customer interview or reviewed feature requests.

Whatever the case might be, the majority of CSMs will have been put through the silent treatment at some point. It's not fun, but you're not alone in this – customer success is a team sport.

3 EMAIL SUBJECT LINES TO RE-ENGAGE WITH YOUR CUSTOMERS

- [ ] ☆ **What are your goals in 2022?**
- [ ] ☆ **How happy are you with X and the value you're getting?**
- [ ] ☆ **What are your challenges right now?**

TIP

Using surveys? Keep it short. No one has time for 21 questions.

A SEAT AT THE TABLE

ANIKA ZUBAIR ON WHAT SHE'S LEARNED SO FAR AS A CS LEADER

By Anika Zubair

If you work in Customer Success, you probably know the name Anika Zubair. Podcast hostess, keynote speaker, co-founder of CSM LDN, and Top 50 Women Leaders in Customer Success 2022. If there's a list – she's on it. Recently, she stepped into her second role as VP of Customer Success at Karbon, a collaborative work management tool for accounting firms.

We reached out to Anika to learn more about her career trajectory and what it takes to carve out a path to get a seat at the table. This is what she had to say.

Believe in your abilities

There will come many moments in your career, especially at a high-growth startup, where your abilities and expertise will be questioned and challenged. Keep your head up and remember to believe in yourself and your abilities. Even in a customer-centric company, the CEO might not fully understand the customer and your tactics, so this is the time to remind yourself – and everyone else – that you're the expert. When you do become a leader in Customer Success and another leader in the business is constantly challenging you or telling you that you don't know because you are a first-time leader, remember this: you got the job for a reason.

A title isn't everything

Sharing your new title on LinkedIn is a great feeling. But as titles get bigger, pressure and expectations get bigger as well. When I became a VP of CS there was an immense amount of pressure to get things right all the time. All eyes are on you to perform and execute and there are tons of people leaning on you. The title usually means there's unrealistic mental and physical pressure put on you. Jumping on planes, trains, and taxis to meet customers and team members can be fun, but also a reminder that a title doesn't always lead to success. This all adds up to a lot, the pressure builds, and I have cried my way through the tough times, but for me – it all paid off in the end. I have found a personal purpose and the pressure and challenges that are thrown at me give me both energy and confidence as I tackle each one of them.

Faster isn't always better

We live in a society where we praise people that are billionaires before the age of 30. We live in an age where tech unicorns happen in a matter of months rather than years. Our society will make you think "How do I achieve success as quickly as possible?" The answer is that there's no overnight success story. It all takes time. The speed you do something or how quickly someone has achieved something isn't important. It's important to remember that when your boss or your senior leadership is putting pressure on you to do things faster (this happens daily in a startup), remind yourself that slow and steady wins the race. Thinking things through, spending time fully understanding the problem, and coming up with multiple solutions all takes time. Carve out the time to be intentional in each of your customer calls and remember that whether it takes one year or twenty years to get into a VP of CS position, it doesn't matter. What matters is that you did it.

Make sure your CEO gets it

These days companies are becoming more and more customer-centric, but be wary if a company is talking the talk but they're not living up to what they say. If your CEO is not speaking to customers on a weekly basis, that's a major red flag. Because when your CEO actually speaks to your customers and truly understands their business and what they're trying to achieve with your product, that will have a huge impact on how they lead and make decisions. Being a CS leader means you'll have to educate the wider company on CS best practices. Other business leaders and departments will argue they know the best way to drive the business forward, but if the business truly is customer-centric, the business will need to be reminded again and again that your insights and understanding of customers are critical to not only the customer's success but also overall company success.

IF YOUR CEO IS NOT SPEAKING TO CUSTOMERS ON A WEEKLY BASIS, THAT'S A MAJOR RED FLAG.

Focus on your customers

Your manager, the board, the CEO, and your team will pull and push you in different directions. But to grow professionally, you need to focus on your customers and their outcomes. The moment you shift your focus to your customers is when the real magic happens. Each minute of each day is a new opportunity to learn more and to be better for your customers. As you focus more and more on your customers you'll be able to make more informed decisions about your career path and follow your intuition to where you're supposed to be. This is a reminder to yourself that you know best when it comes to your customers. But it means that sometimes you'll have to push back other business leaders when they think their idea is better. Remember that you know the customer best and your goal is to help them be successful. Sometimes, that means disagreeing with your fellow business leaders to truly put your customers first – and that's okay.

Follow your gut and your intuition and you'll end up in the right place, regardless of the title. Know that your career trajectory is exactly that: it's yours. No one else will share your exact experiences, but hopefully, we can learn from each other's mistakes as we all grow into the best version of ourselves.

a thing called churn.

Everyone in customer success knows who Nick Mehta is. In fact, he might be the most fired-up CEO in SaaS. But what many of us don't know is that he was introduced to customer success the hard way.

InSided's Remco de Vries met with Nick to talk about his path to customer success, customer health, and creating good habits.

"If you ever go into business, the only job that really matters is sales. Because once you've sold the customer, you can move on to the next customer. And it's all about getting new customers." That was Nick Mehta's first lesson in business back in the 1980s when his dad brought him to the office on Take Your Child to Work Day. Dressed to the nines in his little kid suit, he was educated into the old way of thinking: sales is the only thing that matters. New customers are the only thing that matters.

At the beginning of Nick's career, his dad's advice held true. While running an e-commerce company, and later, as he entered the enterprise software world, retaining customers wasn't on anyone's mind. It wasn't until SaaS stepped onto the scene that focusing only on new customers no longer was a sustainable approach. "I was running this company called Live Office where we had a great quarter in sales. But our revenue didn't go up nearly as much as our sales did. A total naivete, I went to my CFO and said, 'How come our revenue didn't go up as much as our sales?' He replied, 'There's this thing called churn.' My response was, 'Really?' I literally had no idea what churn was. So on the job in my last company, I learned that when you move to a SaaS business model, you can't just focus on new customers anymore. You can't just focus on sales. You have to focus on your existing customers."

The team started to ask questions like who's going to work with our existing customers? How can we tell if they're happy? How can we tell if they're healthy? Are they using our product? Are they an advocate? Are they ready to buy more? Today, this is what we call customer success. "We didn't have a cool term for it back then. We called it client services. But the point is, this is when I realized why it's so important."

When Nick first joined the company, he expected to work closely with the Head of Sales, a guy named Jim. Little did he know that more than 10 years later it wasn't Jim's phone number he'd still know by heart. It was Steve's – the guy who ran client services. "I remember meeting him on the first day thinking, 'Maybe I'll talk to him every couple of months. The customer stuff should just take care of itself. I'm going to focus on sales.' But now, his phone number is etched in my brain." Nick smiles as he effortlessly dictates the phone number.

When the company sold years later, Nick spent some time as an entrepreneur-in-residence, one of Silicon Valley's most popular inventions, deciding what to do next. "I was thinking about starting a company and I wrote up this idea about doing something around customer success software. A friend of mine who's an investor said, 'Hey, you should meet these guys.'" Those guys were Jim Eberlin and Sreedhar Peddineni, and they were working on a product called JBara Software. The three of them hit it off right away. They were all pulling in the same direction.

"But more importantly, it was clear our values were aligned. Today's specific Gainsight values came from me, but it was clear from the beginning that Jim and Sreedhar had similar core principles."

In 2013, Gainsight launched. "After we'd launched Gainsight, I realized two core things. Number one was, that this isn't just about software. This is about a whole new profession, an entirely new industry, even; customer success management. This existed before in different formats. There were account managers, support managers, and client services managers – but they weren't seen as strategic roles. Today we know better. And these people have a clear purpose and identity, and that's so important."

"The second thing was that the concept of customer success and the culture that we have at Gainsight, both surround this idea that business can be done differently. The old world of business was very transactional. Whether you thought of closing a deal and moving on to the next customer, or you thought about using employees until they're no longer valuable to you then you fire them. The idea was very much like, okay, it's just about the bottom line. It's just about winning. And if I win and you lose, there's no problem. And that was the economy a lot of us have grown up in. Instead, we asked ourselves, 'Is there another way to win?' Not to say the other way to win doesn't work at all, because clearly, the other way works, too. There are lots of examples. But is there another way to win? Where instead of being forced to show up at work as a different person and not worry about your emotions, not worrying about other people's feelings, not worrying about other people in general – is there a way to win where you can be human first?"

And there was. Today, Gainsight is just as synonymous with customer success as it is with its human-first approach to business. But how did this happen? Back in 2016, a small management team convened in Half Moon Bay, California. Armed with Verne Harnish's book, Scaling Up, the team worked on the company values. One of the exercises read "Purpose." Nick emphasizes, "I'm not one of those people that thinks I'm curing the world's problems through Gainsight. We're not doing that. We're not solving world hunger. We're not curing COVID. We're not Elon Musk, moving us to another planet. We're just another company. But we're not just another company." So as they debated the purpose part of the exercise, Gainsight's COO at the time, Allison Pickens, simply said: "We're human." And this is what resonated with the team then and what continues to resonate with employees, customers, partners, and investors. "We want to be living proof you could win a business while being human first."

When it comes to his own health and fitness, Nick refers to himself as "that annoying California health nut that everyone makes fun of." And he may just be right. He's vegan, practices

I literally had no idea what churn was.

> "we asked ourselves, 'Is there another way to win?'"

> # I'm obsessed with routines. I don't think about work-life balance. I think about work-life energy.

intermittent fasting, drinks gallons of water every day, gets on his Peloton at any given chance, and does rock climbing at least once a week. The list goes on. The logical next question is, how does he have the time? Has Nick Mehta magically been given more hours in the day than the rest of us? The answer is no, he hasn't. "I'm obsessed with routines. I don't think about work-life balance. I think about work-life energy. If you want to build something big, it's about going far – not going fast. And if you want to go far, like nine years and counting with Gainsight, you have to keep your energy up. For me, the number one thing is maximizing my energy. How do I have maximum energy as a CEO, as a dad, as a husband, and as a friend? I want to always be present and bring in high energy in everything I do. And unless I do all those things, and follow my routines, I don't have that energy."

And Nick is just as obsessed with the health of his customers as he is his own. Because just as we have to follow certain patterns to get and stay healthy, so do our customers. Unsurprisingly, this also comes down to habits.

Nick stresses this: a lot of customer success orgs still operate reactively because they don't have an empowered executive, such as a CCO, who thinks ahead – and long term – when it comes to customer health. "The way most people manage customer health is they're looking at things reactively. Which customer is unhappy? Which one's about to churn? Which ones said they won't renew? Instead, we should be looking at the onboarding experience, the adoption of key features, and whether they're using them properly, or if they're connected to others in their community. Customer health, just like personal health, is about being proactive in those leading activities and creating good habits."

Creating good habits is about being consistent. It's about doing the things you should be doing, but end up putting off in favor of putting out fires. Because just like a week-long juice cleanse won't do anything for your personal long-term health, neither will logging into your customer success software to check their health scores just before renewal season.
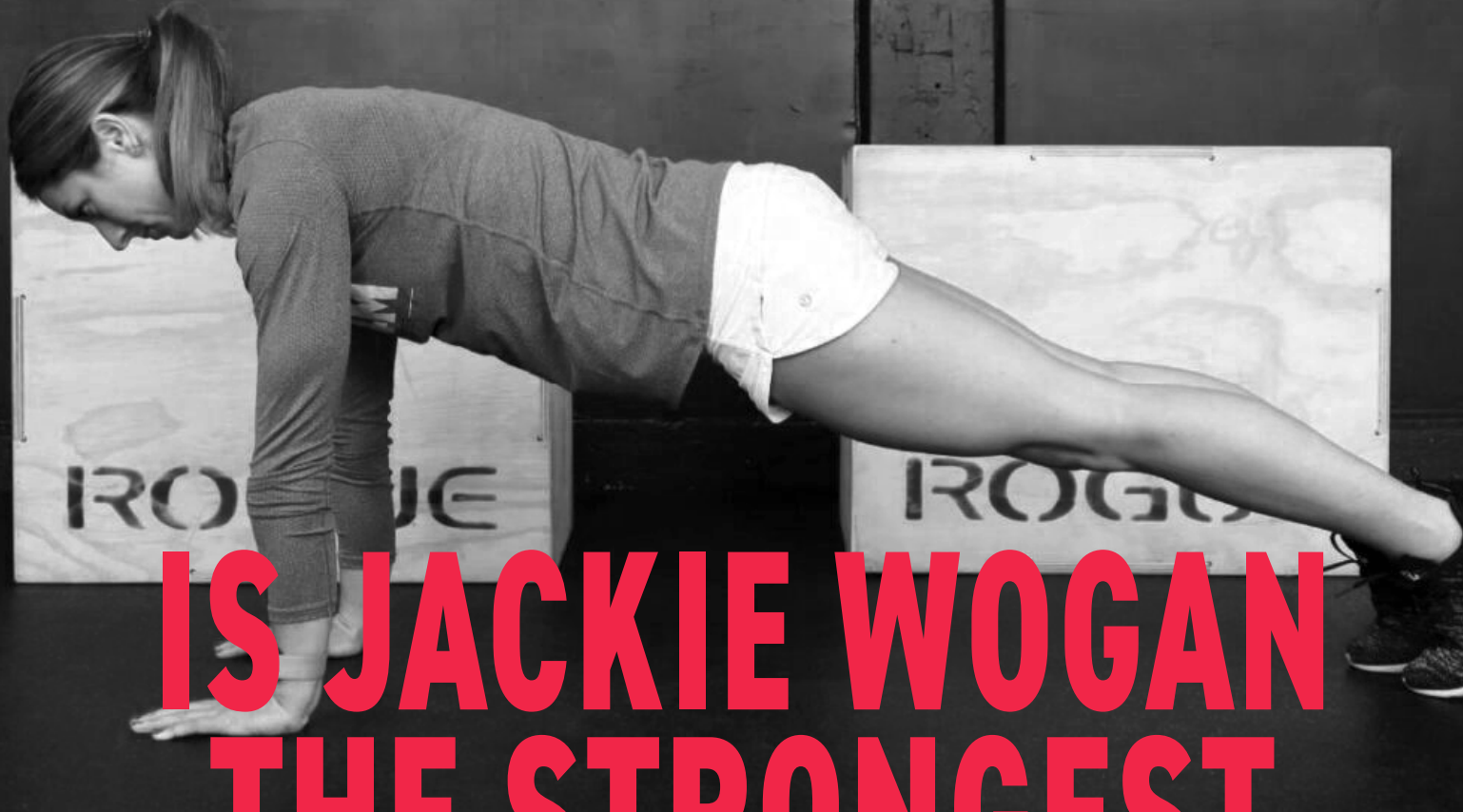
IS JACKIE WOGAN THE STRONGEST WOMAN IN CS?

By Hannah Whalen

Photographs by Nate Gyampo

Jackie Wogan does it all. As the Director of Customer Success at PLT4M, she's a one-person powerhouse. "I am my own department. I'm the director but I'm really directing myself. I operate on a different scale because it's just me running the show." But it wasn't always this way. Back in 2016, Jackie got her start in the CS world as part of Athenahealth's professional services, working with their onboarding team.

Simultaneously, one of the co-founders of PLT4M –– who Jackie had known since high school –– recruited her to be in their athletic demo videos part-time. Pronounced "platform," PLT4M is a physical education software solution with video content to demonstrate workouts. "You could technically say I started in the product. That helped me, right off the bat, to understand what PLT4M was trying to achieve as a company."

Once PLT4M learned Jackie was doing onboarding for another software company, they asked her to come on full-time. Turns out, they were also looking for onboarding help. "And you're also into fitness and part of the product," PLT4M told Jackie, "You're the perfect fit." And Jackie was thinking the same thing. "I'm like, 'Fitness is my passion and I have this experience in CS. This is literally the opportunity for me.'" The rest is history. Nowadays, as a solo director, Jackie lives on the front lines.

Jackie works with customers to empower their students with a fitness education using PLT4M. She's also part of the coaching staff, teaching and demonstrating proper movement techniques in all of their instructional videos. She always starts her days with customer communication, ensuring emails get sent out and spending up to two hours doing what she calls manual customer check-ins. Pulling up a list of larger accounts or struggling accounts, Jackie calls to ask these customers, what's up? Or she may reach out to ones that are successful to identify what's working. "These conversations are so important. I hear them, know what they're voicing, know what they're struggling with and what they're looking for."

PLT4M's product, Jackie explains, is both content and tech — the app used to deliver that content to students. "Because I'm ingrained in both parts, I know what our customers want in a program, but I'm also talking to them on the front lines. So I know how it needs to be accessed or what features need to be incorporated to make it easier to use, and I can intercept them. I've remained ingrained in product and tech by choice. I am still in those conversations and that's really helpful because I'm talking to the customers and then I'm delivering insights to our performance and our tech team."

But at the end of the day, there's only one Jackie Wogan. "I'm a one-person department, so I'm like, "How can I scale this? How can I make me, times 100?" Community was the first answer when I was researching solutions.

> **YOU COULD TECHNICALLY SAY I STARTED IN THE PRODUCT. THAT HELPED ME, RIGHT OFF THE BAT**

> **I'M A ONE-PERSON DEPARTMENT, SO I'M LIKE, "HOW CAN I SCALE THIS? HOW CAN I MAKE ME, TIMES 100?" COMMUNITY WAS THE FIRST ANSWER**

The community is huge for us. It gave me the ability to provide my customers with what they need when they need it, and in one place. I used to share and rely heavily on a basic help center linked in my emails. But now, everything I need to send to customers has a place to live in the community. It's one platform to host all of those communications." Now, every customer communication is linked to the community. "I only want to send people there. If they have a feature request, I say, 'That's a great idea. Post it on the idea board.' If they have a question, I tell them, 'That's a great question. Ask it here and I'll answer it.' And then hopefully 100 people see it rather than that one person. And that way, next time they'll just know where to go for answers. My whole goal is: No more questions coming in, please. They're all going to be answered in the community. "

Jackie's not-so-secret weapon to being everywhere at once? The knowledge base. "Our community truly gets the most use from the knowledge base. It's the gateway. We promote the knowledge base early and often throughout the onboarding process and at different stages of the onboarding journey. We have it embedded in the in-app support, so it's really hard to avoid the knowledge base. But from there, my hope is that folks will get more acquainted with the community."

When she's not working on scaling her CS efforts and boosting customer health, Jackie is working on her personal health and fitness. And no, the irony is not lost on her. But what's more surprising is that Jackie wasn't always a master of fitness. In school, she just wasn't taught how to use a gym or a proper squat technique. Jackie had to teach herself. That's why she's passionate about teaching kids lifelong fitness skills to start their fitness path.

"Don't get me wrong. I played sports, so I was on athletic teams, but I wasn't introduced to those lifelong fitness skills. Teachers come to us for help because they don't want their kids to just play kickball again. They want to teach these kids how to use a gym and what different types of fitness there are. And I feel that at a personal level because I had to teach myself."

Some might even say Jackie's in the business of boosting her customers' health by helping customers effectively teach their students about health. But the parallels don't end there. Health looks for every customer, just like it does for each individual. "Now we're recognizing it's not a one-size-fits-all thing. Now we say, "Maybe yoga is your path. Or maybe Pilates is your path." And the same goes for Jackie's customers. Customer health is unique to each industry, each company, and even to each customer. The good news? Customer health efforts can be unique and scalable. And ultimately, even for a powerhouse like Jackie Wogan, leveraging a community to scale up CS initiatives creates more time for more important things. Like a good workout.

> ## MY WHOLE GOAL IS: NO MORE QUESTIONS COMING IN, PLEASE. THEY'RE ALL GOING TO BE ANSWERED IN THE COMMUNITY

THIRSTY
FOR MORE CUSTOMER ENGAGEMENT?

**PURE FEEDBACK
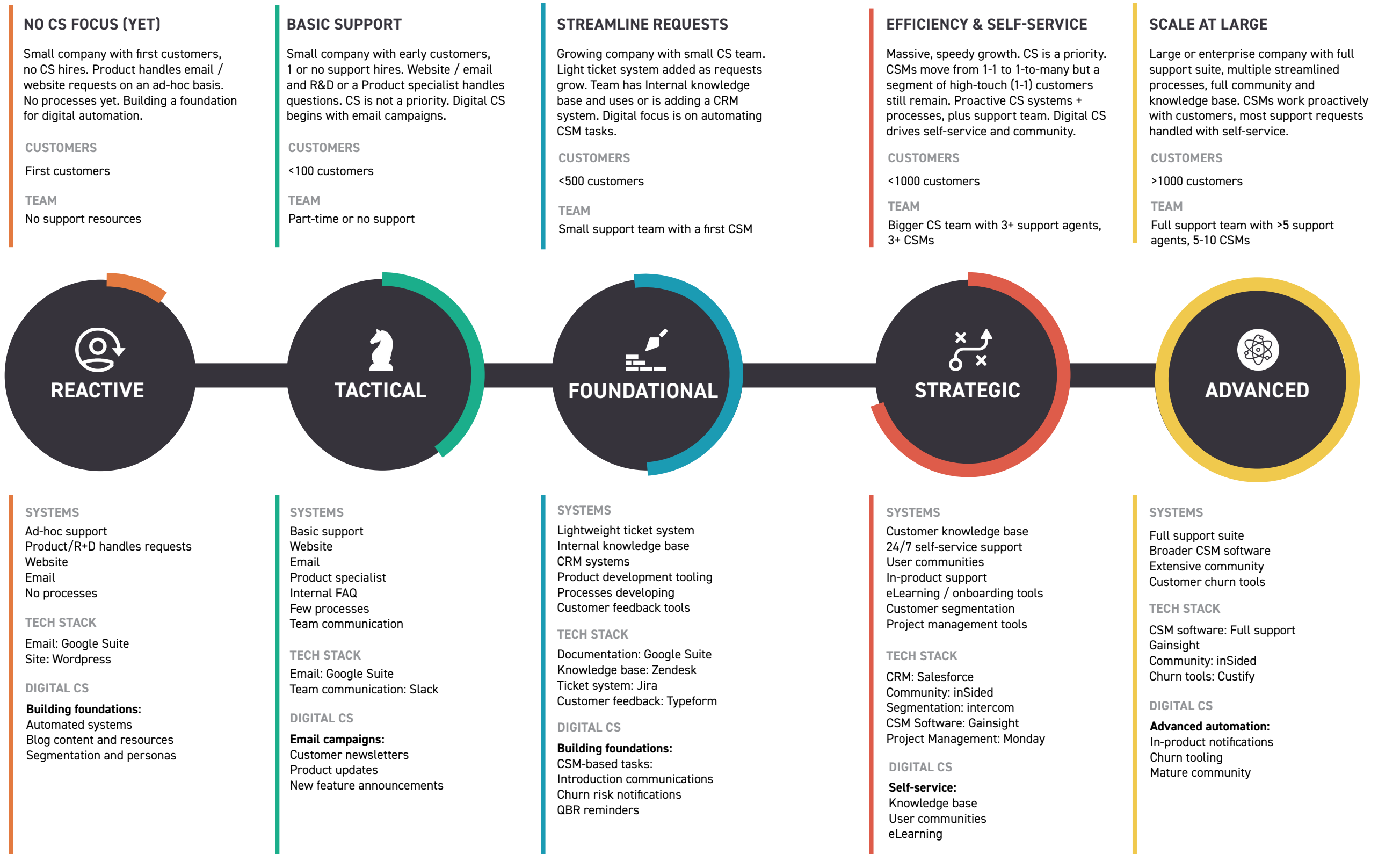PURE ADVOCACY
PURE RETENTION**

Refresh yourself with insided

insided

Customer Success Maturity Model

Where does your organization fit in the Customer Success Maturity Model?
See where you stand — and how to scale your growth.

NO CS FOCUS (YET)

Small company with first customers, no CS hires. Product handles email / website requests on an ad-hoc basis. No processes yet. Building a foundation for digital automation.

CUSTOMERS
First customers

TEAM
No support resources

BASIC SUPPORT

Small company with early customers, 1 or no support hires. Website / email and R&D or a Product specialist handles questions. CS is not a priority. Digital CS begins with email campaigns.

CUSTOMERS
<100 customers

TEAM
Part-time or no support

STREAMLINE REQUESTS

Growing company with small CS team. Light ticket system added as requests grow. Team has Internal knowledge base and uses or is adding a CRM system. Digital focus is on automating CSM tasks.

CUSTOMERS
<500 customers

TEAM
Small support team with a first CSM

EFFICIENCY & SELF-SERVICE

Massive, speedy growth. CS is a priority. CSMs move from 1-1 to 1-to-many but a segment of high-touch (1-1) customers still remain. Proactive CS systems + processes, plus support team. Digital CS drives self-service and community.

CUSTOMERS
<1000 customers

TEAM
Bigger CS team with 3+ support agents, 3+ CSMs

SCALE AT LARGE

Large or enterprise company with full support suite, multiple streamlined processes, full community and knowledge base. CSMs work proactively with customers, most support requests handled with self-service.

CUSTOMERS
>1000 customers

TEAM
Full support team with >5 support agents, 5-10 CSMs

REACTIVE — **TACTICAL** — **FOUNDATIONAL** — **STRATEGIC** — **ADVANCED**

REACTIVE

SYSTEMS
Ad-hoc support
Product/R+D handles requests
Website
Email
No processes

TECH STACK
Email: Google Suite
Site: Wordpress

DIGITAL CS
Building foundations:
Automated systems
Blog content and resources
Segmentation and personas

TACTICAL

SYSTEMS
Basic support
Website
Email
Product specialist
Internal FAQ
Few processes
Team communication

TECH STACK
Email: Google Suite
Team communication: Slack

DIGITAL CS
Email campaigns:
Customer newsletters
Product updates
New feature announcements

FOUNDATIONAL

SYSTEMS
Lightweight ticket system
Internal knowledge base
CRM systems
Product development tooling
Processes developing
Customer feedback tools

TECH STACK
Documentation: Google Suite
Knowledge base: Zendesk
Ticket system: Jira
Customer feedback: Typeform

DIGITAL CS
Building foundations:
CSM-based tasks:
Introduction communications
Churn risk notifications
QBR reminders

STRATEGIC

SYSTEMS
Customer knowledge base
24/7 self-service support
User communities
In-product support
eLearning / onboarding tools
Customer segmentation
Project management tools

TECH STACK
CRM: Salesforce
Community: inSided
Segmentation: intercom
CSM Software: Gainsight
Project Management: Monday

DIGITAL CS
Self-service:
Knowledge base
User communities
eLearning

ADVANCED

SYSTEMS
Full support suite
Broader CSM software
Extensive community
Customer churn tools

TECH STACK
CSM software: Full support Gainsight
Community: inSided
Churn tools: Custify

DIGITAL CS
Advanced automation:
In-product notifications
Churn tooling
Mature community

WHICH CUSTOMERS ARE A FIT FOR A DIGITAL-LED PROGRAM?

By Brian LaFaille

Digital customer success is for everyone. This is the message that has echoed across LinkedIn and in the wider CS community for some time. And while that's true, it doesn't mean high touch is a thing of the past. We caught up with Brian LaFaille to get his take on segmentation and how they score customers at Looker.

When CS teams start out, they often align with the sales organization to have clear accountability across sales and CS. The natural next step is to segment your customers based on ARR. At Looker, this is the approach we took in the very beginning. And it made sense. The sentiment was that we needed to protect the customers that are spending the most and make sure we grow them. As a result, these customers all got a CSM. And it's not a bad approach. It's straightforward, instantly quantifiable, and you know the dollar amount as soon as the deal closes. Plus, you can plan for

it and look at a forecasted pipeline. But in the name of durable growth, it's not a sustainable approach. What we noticed over time is that a couple of things broke down for us when we started to use that approach at scale.

Where this approach falls short is that you can't identify high-growth accounts. In the early days of Looker, we signed IBM. If we had only looked at the ARR, no one would have thought twice about growing that account. They had signed a tiny pilot worth $12,000. Based on that, they would never have gotten a CSM. When reality is that IBM is a huge, publicly-traded company with hundreds of thousands of employees worldwide. It was instances like that when we realized, look, if we just look at ARR, IBM would never get a CSM. They would just go into a digitally-led program. But If this goes really well, there's a massive opportunity for us to expand in this account.

After this, we came up with a model that looked at both the ARR and the number of employees. In this case, the number

of employees represented the growth opportunity. Next, we attached this simple framework to a point system. For every $10,000 of ARR, the company gets one point. For every 1000 employees, the company gets one point. Using this scaling system of points, we were able to assign CSMs based on both ARR and the expansion opportunity. The number of employees may not be the right metric for every company, but it worked for us at Looker.

Once we had this point system in place, we grouped all of our customers, scored them, and bucketed them. Then we said, "the top 1-2% that are scoring hundreds of points, they're natural candidates for CSMs." But the ones in the middle and the lower tier, are the ones that either have a low ARR or they have a decent ARR, but the number of

employees at the company is fairly low. By having a scoring mechanism where we could standardize and group customers into high-touch or digital-led buckets, Looker started to introduce more programmatic elements into segmentation. Plus, when discussing the new approach with Sales and Professional Services they were completely aligned. Their response was pretty much, "Um yeah, I want a CSM on that IBM deal." And that's something that was missing before.

Introducing the point system, and publishing that with their Sales, Professional Services, and Support counterparts, helped every team to be aligned and have a baseline to use to score customers. Customers that score above X are good candidates for a CSM. Candidates that score under a certain

level potentially will go into a digital-led program. I also want to stress that I'm saying potential candidates. Why? Because this is just a starting point. If there's a customer that scores below the threshold, but the sales rep or the Sales Manager comes to us with some added context, for example, this company is going to acquire this other company in the next six months. Then that's a good opportunity. Let's keep a CSM on them and we can evaluate later.

The point system helps guide the conversation in a more data-driven way. And that's what we're trying to do when it comes to scaling, is how can we assign quantitative measures to some of the scaling elements.

> "
> **WHAT WE NOTICED OVER TIME IS THAT A COUPLE OF THINGS BROKE DOWN FOR US WHEN WE STARTED TO USE THAT APPROACH AT SCALE.**
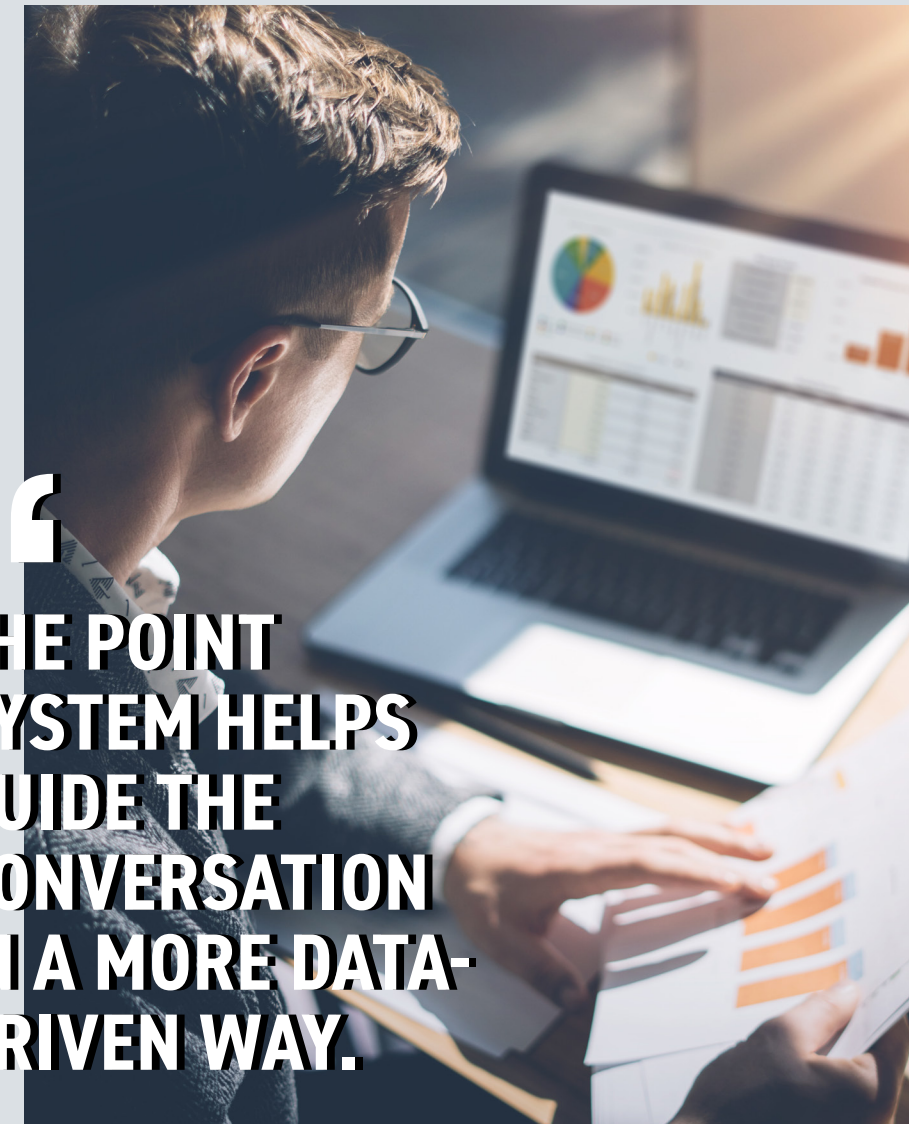
KEEP YOUR POINT SYSTEM UP-TO-DATE:

Use a system such as Clearbit or a data entry tool that plugs into LinkedIn.

ASK THIS:

What data point(s) can help you standardize which customers might get a CSM and who's a good candidate for a digital-led program?

> "
> **THE POINT SYSTEM HELPS GUIDE THE CONVERSATION IN A MORE DATA-DRIVEN WAY.**

TOP 10 TRAINER TIPS TO
BOOST YOUR CUSTOMER HEALTH SCORES

JENNY WEIGLE
Chief Community Officer & Strategic Consultant

"If you're looking to engage customers through a new content or event series, be sure to plan ahead and publish/hold them at consistent time frames."

JULIANA SPINARDI
Community Specialist @ Pipefy

"It's super hard to engage people and bring people to conversation, that's why I believe creating new content and giving them products and making them feel special in a community is the key to success."

IRIT EIZIPS
CEO & Chief Customer Officer @ CSM Practice

"What differentiates my best-in-class customer? What is the real difference here in their behavior and how they're using the system? Make that list. Did all of those make it in my health score? And start benchmarking and make a better health score."

PHILIPP WOLF
Founder @ Custify

"It's important and essential to set multiple health scores. It's even more important to have the ability to weigh health scores according to their importance and have them easily visible in the client dashboard."

ISABEL RUIZ
Customer Education Manager @ inSided

"Ally with your CS Ops team to identify behavioural patterns before implementing a customer health scoring system. Analyze your current data first. What trends are you able to recognize?"

WILFRIED RIJSEMUS
Partner @3Sides

"The earlier in the engagement process you measure, the better you can positively influence the outcome."

LONI BROWN
Founder @ IntelliTalent

"Make sure the team and company are bought into the score or people won't act on behalf of it."

TODD NILSON
President @ Clocktower Advisors

"Measure customer health directly with both qualitative and quantitative methods. Too many organizations rely overly much on NPS and CSAT. Talk to your damn customers directly and one-on-one. I have found that the qualitative insights tend to be far more helpful. You can always validate with more scientific, quant methods later."

BRIAN OBLINGER
Chief Community Officer, SVP of New Products @ Commsor

"When you dig into the metrics and methodologies many companies use to measure 'health scores,' you discover that they really mean 'likelihood that this company will continue to pay us money' instead of answering the question 'are they truly successful?' Orient your methodology toward making customers successful, then they'll spend money with you."

ERICA KUHL
CEO & Strategic Community Consultant @ EKC

"I don't think CSAT or NPS in a vacuum is a good thing at all. You'll always need more context around what's happening than those rather simplistic measures. 2 or 3 additional KPI/OKRs together are simple, yet powerful enough to tell the story."

WHAT'S NEXT IN CUSTOMER HEALTH?

FIVE LEADERS HAVE THEIR SAY

Jan Young

Sr Consultant, Customer Success
The Success League

As a Customer Success Consultant, I help a lot of companies improve their customer health metrics.

Bottom line—a meaningful, impactful customer health metric is iterative and, like many things in customer success, dependent on the product and customer base. Most importantly, it relies on a foundation: customer segmentation and customer journey.

1. Your customer segmentation should be based on how the customer uses your product and the goals that they have in using your product. You may find you want to further segment your customer base by ARR, essentially your economics for the delivery of the customer journey.

2. The customer journey should include the important milestones, behaviors, and outcomes for the customer segment you've identified.

Once you've mapped out the customer journey for the customer segment, and you know what milestones and outcomes you want to track, take the next step and analyze:

- How each customer is performing against them and graph them out. Visuals are a great way to see how your customers are doing and where your "green", "yellow", and "red" customers are clustered.

- The important elements and key moments in the customer journey that lever the biggest contributions to successful customers or lead to churn.

Then test it out. Iterate. Update as you develop new products and add more customers.

The benefit of this approach is you not only get a more meaningful, actionable customer health metric, but you can also identify areas of your customer success program that need alignment and improvements.

> A MEANINGFUL, IMPACTFUL CUSTOMER HEALTH METRIC IS ITERATIVE AND, LIKE MANY THINGS IN CUSTOMER SUCCESS,DEPENDENT ON THE PRODUCT AND CUSTOMER BASE

Kristi Faltorusso

VP of Customer Success
Client Success

For years customer success leaders have designed their customer health scores based on internal objectives and metrics; these scores were rigid and assumed that all customers used their technology the same way – guess what, one size does not fit all.

As we move into the future there are five predictions I believe we will start to see.

1) Health scores based on customer segments - if you've grouped your customers correctly, the scoring mechanism should apply. With the shift towards a digitally-led engagement model and the continued focus on high engagement, making sure health is aligned will be key.

2) Customer goals as a core contributing factor - if we know that customers who have achieved their goals are more likely to stay and grow, we should be tracking this closely in the health score. Weight this appropriately because this will make or break the partnership.

3) Scores based on stage behaviors - Customers who are in onboarding will likely look a lot different than customers who are in their third year of the partnership, so it's essential to focus on the right metrics.

4) Customer health scores NOT customer churn scores - More people will focus on identifying what good looks like, not what bad looks like.

5) Usage and adoption are here to stay - Not all customers will use your product the same way but one thing we know for sure, if they're not using it at all, then they're not getting value from it. This key component will stay integrated for years to come.

> MORE PEOPLE WILL FOCUS ON IDENTIFYING WHAT GOOD LOOKS LIKE, NOT WHAT BAD LOOKS LIKE.

Irit Eizips

Chief Customer Officer & CEO
CSM Practice

In large companies, we will replace the customer health score with an upsell score and a customer risk score. This separation will help drive proactive activities by various specialized teams more accurately and efficiently. For the lower customer cohort, these scores will be calculated based on customer data and the algorithm will continuously improve over time by leveraging AI technology.

Jeff Heckler

Director of Customer Success Solutions
MarketSource, Inc.

In light of the explosion of digital customer success (digital CS), concentrated efforts need to be made, often on a quarterly basis, to maintain optimized and accurate health scores to maintain operational excellence. For brevity, I focus on two key areas: customer segmentation and customer journeys.

By organizing your customers into segmentations and cohorts with as much constraint as your organization can apply, you can best create meaningful KPIs and metrics at scale. The volume of data gathered here, over time for additional trend creation and predictive analytical analysis, is vital to creating meaningful benchmarks for comparison and modeling.

In parallel, the customer journey maps you establish will provide targeted moments of value and moments of truth which can then be utilized as key components to aggregating the overall customer health score.

As metrics from your digital CS operations are introduced into your overall customer health scores, start small and go slow. Use testing with control groups from the same segments and cohorts. Confirm the results with customer interviews and individual contributors, and face-to-face customer sentiment input. Most of all, include representatives from across your teams at all levels to maximize well-rounded, curated, and consensus-built observations and input.

> " I FOCUS ON TWO KEY AREAS: CUSTOMER SEGMENTATION AND CUSTOMER JOURNEYS.

Gemma Cipriani-Espineira

Chief Customer Officer,
Chili Piper

At Chili Piper, we're excited about automatically incorporating more direct customer feedback from surveys and commercial risk factors (mergers, acquisitions, POCs leaving) into our customer health scores this year.

Beyond this, I see an incredible opportunity for customer health scores to incorporate machine learning methods of data analysis to identify which product actions can lead to renewal, expansion, or churn. My vision is to use these to uncover hidden

use cases or forgotten about features that have a huge impact on end-users. I am excited about the new SaaS companies cropping up in this field who are offering to identify significant causations to help burn the churn!

#1 customer recommended way to keep them *happy and heard*

+engagement
+peer-to-peer support
+findability

vitamin
C
Community

MADE WITH ORGANIC PRODUCT FEEDBACK ALL-NATURAL INSIGHTS AND FRESH LEADS

vitamin
C
Community

Aries
21 March –20 April

ARIES IN THE OFFICE: has no filter and gets sent to HR, gets daily work completed before lunch every day, browses Linkedin for community roles weekly.

This month your energetic and outgoing nature will be put to good use at your first local community meet-up. You're no stranger to connecting and networking with new people and with your ruling planet being Mars, you'll most likely make this event a series based on the success. You'll also get clear about your investment (emotional and professional) and why it matters to you.

Gemini
21 May – 21 June

GEMINI IN THE OFFICE: Loudest person in the room, makes everyone laugh, always ready to serve up a controversial opinion, knows everything.

You're lucky you have a flexible attitude because your adaptive powers will be put to the test more than ever. One customer will have an unexpected demand, so make sure to surround yourself with people that are on your team. Don't overanalyze emails or reply in anger. Take five and play it cool. Check that EBR deck one last time. One superuser is getting a bit cocky, keep an eye on them. But don't worry, your community's got your back.

Leo
23 July – 23 August

LEO IN THE OFFICE: Likes to stand out and take charge, has a big personality that exudes creative energy, is generous, and probably arranges your birthday cupcakes.

Changes are coming, Leo. If you've been working from home, you might be going back into the office, or if you've been working in an office, you might be heading home to work remotely. Either way, it's exactly what you've been craving: the chance to prove yourself and connect with new people. Just remember, when you help land that big new customer, share the credit where it's due
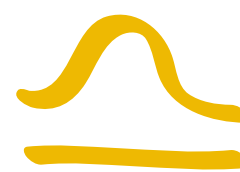
Libra
23 September – 23 October

LIBRA IN THE OFFICE: Quick to come up with ideas, indecisive but charming, hates confrontation, will try to get a free lunch.

Time to align. With yourself. With your coworkers. With your customers. You're gearing up for change. That change will come at a cost as you'll face roadblocks and challenges. But you will emerge on the other side. Wiser, more confident, unstoppable. Embrace the journey and remember to always listen first. Your indecisiveness will only be an issue if you let it.

Sagittarius
23 November –22 December

SAGITTARIUS IN THE OFFICE: First to speak on a Zoom call, sends fiery email clapbacks, always suggests post-work happy hour.

This month you might find yourself taking on too many projects. Your optimistic nature wants to fix everyone's problems, but take this time to focus on what the big-ticket items are from your company. Yes, you'd love to start commenting more in your community and sending sales more potential new customers, but what should be your main focus? Make a game plan.
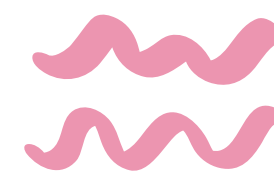
Aquarius
20 January – 19 February

AQUARIUS IN THE OFFICE:Known as an innovator, fiercely independent but a natural (and fun!) networker, thrives within a stable routine

This is a time when you and the rest of the world may be marching in different directions. Other people's egos can get in your way but don't get resentful just because someone edited your powerpoint. Expect to have to review or redo things that seemed ready to go. Be open to new perspectives (you know you crave knowledge!), you'll be a better person and colleague for it.

Taurus
20 April –21 May

TAURUS IN THE OFFICE: Get things done fast, can probably single-handedly increase NRR by several percentage points, wears the same outfit every day.

Don't let your stubbornness get in the way of your team's success. Try being more flexible, even if you're leaving your comfort zone. You're feeling a bit uneasy around certain decisions right now. It's time to be the bigger person, justice will come. Your customers trust you. This is your time to lead, not look back. You will reap the rewards when renewal season dawns upon you

Cancer
21 June –23 July

CANCER IN THE OFFICE: Sensitive and deep, they put their hearts into anything they believe in, but a hard nut to crack before they let you in, never bother them if they're in a conference room alone.

You're often the first to help out with a co-worker's challenge and now, finally the recognition you deserve! You might receive compliments from a delighted customer, perhaps even mentioned at the next company-wide meeting. All that social engagement will be tiring so be sure to avoid overwhelm by taking the time to recharge in solace.

Virgo
23 August – 23 September

VIRGO IN THE OFFICE: First to know office gossip, always asks questions during company town-halls, likes to help other teams when they have free time, very loyal to their company.

You've run into a few roadblocks and unexpected hurdles in regards to certain customers. Just focus on clear communication and the hostility will fade away. Tap into your Virgoan powers to find the right vocabulary to explain some of the challenges and solutions you see for this tricky customer or two. You're naturally good at thinking of ideas so that should be no problem.

Scorpio
23 October –22 November

SCORPIO IN THE OFFICE: Incredibly focused, driven, and dedicated; OK with uncomfortable Zoom silence and you'll never be sure if they're serious or joking.

It's no wonder that Halloween falls in the middle of Scorpio. This is the only time of year when haunting your co-workers, sugar-induced hysteria, and impersonating Steve Jobs won't get you fired. Even though Scorpios prefer to fly solo, it doesn't mean that they can't be good team players. If you manage a Scorpio, give them individual praise for success and let them be in charge of their tasks.

Capricorn
22 December –20 January

CAPRICORN IN THE OFFICE: Most trusted, immense feelings of responsibility, takes a while to get to know, hungry for success.

It's time to deal with your emotions - no more tip-toeing. Use them to fuel your work. A promotion isn't far away. But is someone close to you gunning for it, too? One fateful meeting will determine the outcome. Yet, there are plenty of other opportunities if the universe decides it's not yet your time. Remember your worth and others will know it, too. Now is the perfect time for you to network and connect with others.

Pisces
19 February – 21 March

PISCES IN THE OFFICE: Full of creative and weird ideas, working on three podcasts at once, takes the time they need to do things right.

You're flexible in any situation, which makes you great at what you do and helps you find a sense of belonging in different communities. But be wary of customers who may challenge your adaptable boundaries (they'll respect you more for it when renewal time comes around). And don't pass up that upcoming creative project - perhaps one that could earn you that LinkedIn cred you've been seeking - while your energies are high.

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