



The Customer-Powered Customer Success Playbook



The post-sale experience is a critical part of the customer journey. Providing a flawless experience leads to high customer loyalty and growth. Also, strategically placed moments of surprise and delight can create powerful new advocates.

Modern B2B organizations should not rely on their technology alone to create a positive customer experience. They must also take ownership of the outcomes generated by their customers with their Customer Success function. This function is people-intensive and responsible for generating renewals, and often account growth through cross-selling and upselling. Some are responsible for generating customer advocacy as well.

The challenge for CS organizations is the level of labor-intensity which makes it difficult to scale. Whether the task is onboarding new customers, saving accounts forecasted to churn, or discerning which accounts to target for an upsell campaign, a Customer Success Manager (CSM) is usually involved and is the limiting resource.

Nick Mehta, CEO of Gainsight, says, “instead of only focusing on internal metrics (e.g., churn, retention, and NPS), the most sophisticated companies are looking from the outside in, starting with the customer’s experience and desired outcomes and working backward.”

“In other words, you are not the protagonist of your customer’s journey. It’s a natural tendency to think of ourselves as the hero, but in Customer Success, we’re an advisor, a guide, and (maybe) a friend. They’re Harry Potter, we’re Professor Dumbledore.”

Tools like Gainsight help orchestrate that customer journey across complex organizations with multiple teams and multiple touchpoints to make sure the customer achieves their desired outcomes and has great experiences with every interaction. Healthy customer-sustained communities are almost always linchpins of those successful outcomes and great experiences. CSMs and the community can also be complementary, working together to drive value and experience for customers.

Improve user adoption and retention

Creating successful customers starts with education. A customer community is a perfect place to share resources that will set new customers up for success. You can make this process more engaging and interactive by creating timely, gamified community campaigns. This way, sharing best practices, news, and product education feels like less of a chore to customers, and more like fun.

A little bit of creativity and competition can entice users to master new features or learn about other customer success initiatives, and be automatically rewarded for their participation. This improved customer experience drives faster time to value and increases customer retention over time.

A community also helps adoption and retention since customers can help each other resolve problems quickly, and inspire one another to do more with your product. Take for example: the code red process. When customers are not generating value required to renew, their CSM will often scramble to get the customer back on track. Tools like Gainsight can be used to identify churn risks early, and then run “plays” from a playbook to help the CSM guide the customer towards success.

However sometimes the customer just does not want to speak with a CSM—they have had enough, and do not intend to renew or spend any more time on the solution. In this case, the customer may be willing to connect with successful customer peer in the community instead who is from their industry. This connection could be set up automatically through an algorithm or by a CSM.

Launch new customers effectively and scalably

The best CS organizations are fastidious about launching new customers well. Generating measurable value early in the relationship has a massively positive effect on retention, growth, and advocacy. Tools like Gainsight are used to track an individual customer’s progress through their onboarding and training process. Ones that are stalled can be prioritized for intervention by a CSM or onboarding specialist.

The power of relevant advocates can be even more transformative early on in the customer journey. We have seen significant success with customer mentorship programs, in which experienced customers guide new customers on how to generate the most value from the solution. The community is used to set up these connections which offer value to mentors and mentees.

Often customer mentors work hand in hand with CSMs to get new customers launched successfully. Once successfully launched, the new customer is much more likely to serve as a mentor in the future, creating exponential value for the customer community. This is the culture of customer advocacy that can lead to industry dominance.

By providing your customers with a central place to connect with and learn from each other, you also give them the support and motivation they need to be successful with your product and continue advocating for your brand.

Uncover account growth opportunities

Uncover your happiest users, and introduce them to products or services they may not be aware of through educational campaigns, so that no potential revenue goes undiscovered. This will help your CS team take the guesswork out of which accounts are ready for an upsell conversation. Plus, establishing meaningful relationships with your most successful advocates will make broaching the topic of account expansion a more natural part of their journey.

Success Story



How Rosetta Stone Used Their Customers to Boost Retention By 58%

Katie Raeburn, Customer Marketing Manager for Rosetta Stone—a language-learning software provider—needed a scalable way to keep customers from churning after their first year of signing on. Since customers couldn’t easily contact their support team or find the materials they needed to successfully use the software, she found that renewal rates were declining.

Katie and her team believed that enlisting their customers to help with the onboarding process might be the answer to keeping users longer, so they developed a community of advocates to share the load. Just 12 months after launching

“The Bridge” community as part of their customer advocacy program, they uncovered some impressive results:

- **58% higher retention rates**
- **Almost 400 survey feedback responses**
- **More than 470 discussion forum replies**
- **179 advocate social shares**

In exchange for their contributions, Katie rewards advocates with points, which they can use to redeem special perks—from Rosetta Stone socks to recognition in their community.

“Our business—language learning—is about connecting with people. The Bridge allows us to connect with more customers and help them succeed.”



KATIE RAE BURN,
Customer Marketing
Manager for Rosetta Stone

Success Story



How BombBomb Onboarded More than 400 Customers in Less than a Month

The customer success team at BombBomb—a platform for creating and sending video emails—needed a scalable way to onboard users of their newest product, while still keeping customers happy. Originally designed as a “white glove” 30-minute onboarding phone call, product demand soon outpaced the team’s ability to conduct one-on-one calls.

Responding to customer feedback, BombBomb created an in-app “Choose your own adventure”

onboarding process, allowing customers to choose what they wanted to accomplish while keeping it human with videos produced on their own platform. As a result, they onboarded more than 400 customers in less than a month and saved 322 hours in support time.

Effectively onboarding customers so that they can quickly succeed with your products is a prerequisite for building an engaged community.

“With in-app onboarding, customers could get an easy, no-fuss breakdown of how to use our product while feeling as if we were walking them through it along the way.”



JEREMY KLEIER,
Customer Success
Engineer, BombBomb⁵

⁵Beth Harvey, “[Pendo Story: BombBomb](#),” Pendo, April 19, 2018.

Worksheet

Build Your Own Customer-Powered Customer Success

Where can you use customer-power to create a delighting and engaging customer journey?

- Are there points in the journey where customers seem to “stall”? Or adoption rate drops?
- How can customer-power help customer success teams reduce churn?

Touchpoint	Onboarding	Training/Certification	Ongoing Support & Sharing Best Practices
<p>Issue/ Opportunity:</p>	<ul style="list-style-type: none"> • <i>How can we set new customers up for success?</i> 	<ul style="list-style-type: none"> • <i>How can we provide better training?</i> 	<ul style="list-style-type: none"> • <i>How can we take our program to the next level?</i>
<p>How Customer Power Can Help</p>	<ul style="list-style-type: none"> • <i>E.g. Connect new customers with advocates (mentoring program)</i> 	<ul style="list-style-type: none"> • <i>E.g. User-generated content</i> 	<ul style="list-style-type: none"> • <i>E.g. User success spotlights</i>



READY TO BUILD A CUSTOMER-POWERED ENTERPRISE?

This guide is an excerpt from The Customer-Powered Enterprise Playbook

Download the full Playbook for:

- 7 strategic guides tailored to various departments of your business (including Marketing, Customer Success, Sales & more)
- 9 inspiring case studies that demonstrate how customers can fuel your business
- 7 tactical worksheets to help you start integrating customer power into each of your departments
- An overview of the different technology solutions that are available to leverage the power of your customers

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