



So you want to be successful in Customer Success?

A comprehensive guide for Customer Success leaders.



in partnership with

Gainsight

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An interview with
Dan Steinman,
General Manager
of Gainsight UK

Gainsight

How do you define customer success? What can we expect from the growing customer success profession this year? Far too many questions are answered initially with these two words – “it depends”.

There are so many variables involved in trying to answer both of these questions. Variables like geography, industry, business model, B2B vs B2C, etc. As you can expect, opinions differ on how to define the function. Personally, I believe that the job of customer success is to reduce the gap between “what is possible with your product i.e., what product managers built your product to do” and “how your customers actually use it.”

Even where it's a business imperative, customer success is still an emerging discipline. For historical context, look at the rise of CRM. CRM existed long before it was called that (and long before Salesforce.com, too). There has always been a need for businesses to understand their sales pipeline whether that was simply conversations between sales people and their bosses, spreadsheets, or a system like Salesforce.

CRM as we know it today is simply the evolved state of a business imperative; the aim is to make your sales function scalable and predictable. Today, across many industries and types of businesses, CRM is a given and the systematization of the discipline is a necessity. But not every business needs to automate it. In fact, most don't. What percentage of all the businesses in the world does Salesforce's 170,000 customers make up? Some very small number. Even if you add Siebel, Sugar, Dynamics, Hubspot, InfusionSoft, Pipedrive, and all of the others' customers together, you still end up with a very small percentage of the world's businesses.

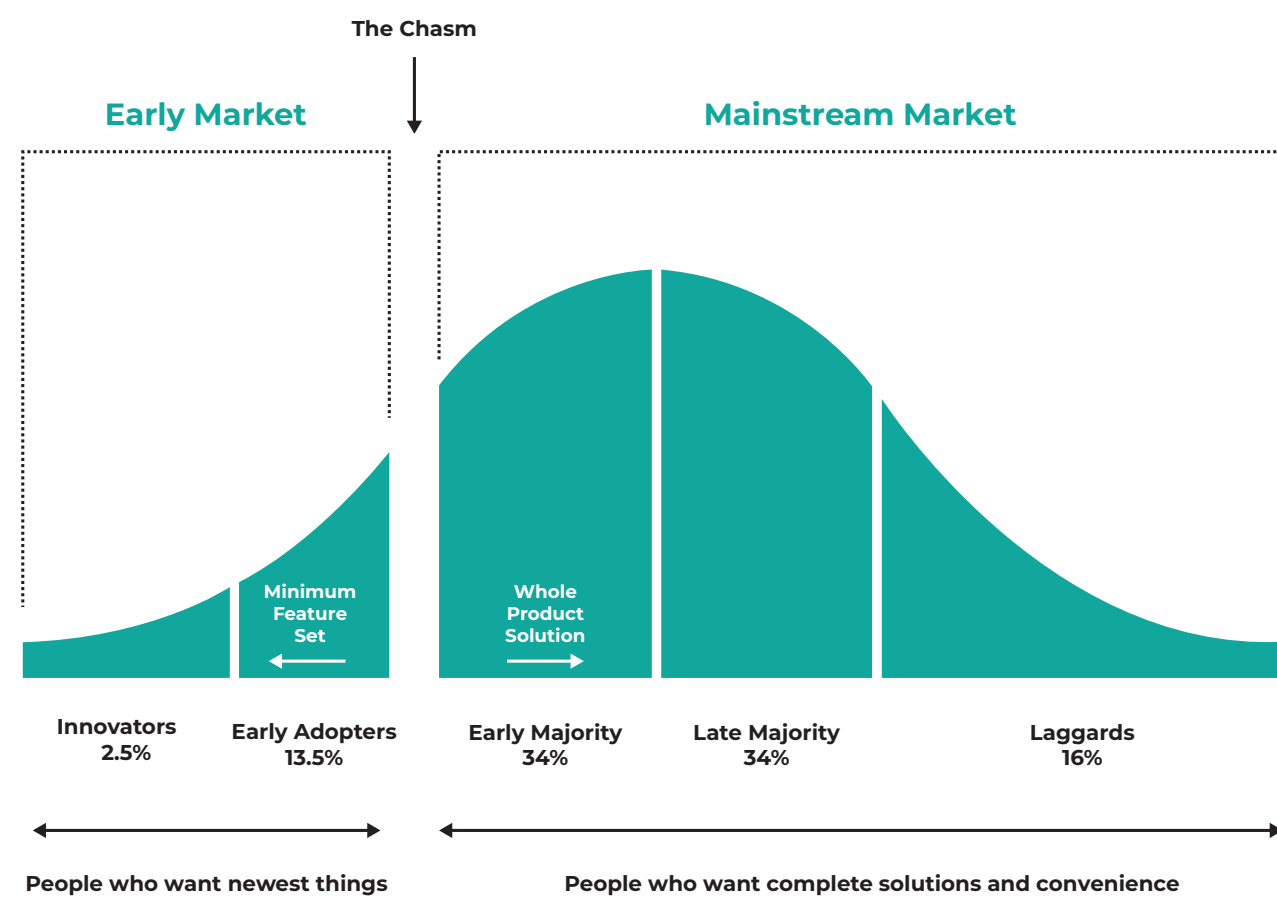
The Maturity of

CUSTOMER SUCCESS

Customer success will travel a similar path and likely follow a similar trajectory. Different types of businesses will adopt the philosophy faster than others. Some businesses may never need customer success at all. But the movement that began largely in technology is still just barely getting started. Generally speaking, the closer you are to a tech center (Silicon Valley, Berlin, Boston, London, Austin, Barcelona...) and a B2B subscription

business model, the more mature the customer success motions will be at your company.

If we borrow from Geoffrey Moore’s brilliant opus, “Crossing the Chasm”, we can make a bit more sense of this. Different types of businesses fall differently into the stages of the classic chasm lifecycle, pictured below:



“Customer Success, as a formal discipline, has been largely driven by the move towards the subscription economy.”

If we apply the chasm model to customer success - where those companies further left are more likely to be adopting customer success principles and those to the right

are less so – we also find a way to map the maturity of the customer success discipline. It looks something like this:

Chasm Stage	Type of Company	Customer Success Maturity
Innovators & Early Adopters	B2B SaaS	Med to High
Early Majority	Near-tech or tech-driven businesses with a recurring revenue component	Low
Late Majority & Laggards	B2C, non-tech-oriented, non-recurring revenue businesses	Non-existent or doing it unconsciously

Customer success, as a formal discipline, has been largely driven by the move towards the subscription economy. Many of the motions of customer success feel very familiar to those of us who were around technology in the 90s, but there’s no denying that a seismic shift happened when subscriptions became the way we sold our products and browser/cloud/mobile became the way we delivered them.

Virtually every single B2B software company has discovered that product adoption does not happen simply by assigning usernames and passwords and waiting for usage to regularly occur. It takes more effort than that! And, without that effort, harmful things happen such as churn, customers who don’t grow, and a lack of advocacy in your customer base. Any one of those can kill a subscription business and, unless your business has an amazing and provable ROI,

all three of those bad things will almost certainly happen without applying customer success.

That explains why we’ve reached a tipping point in the SaaS world with regard to customer success. There’s an old saying that history repeats itself. I referenced the history of CRM previously and it went much the same way as I’m describing for customer success. When CRM really took off in the late 1990s and early 2000s, the adoption of CRM systems happened almost exclusively in technology companies. That led to all those companies rapidly improving their sales processes and predictability. Wall Street rewarded those behaviors and valued those companies more highly, which then led every other company to follow the same path.

Not coincidentally, Wall Street has fueled the movement to subscriptions by valuing SaaS

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Evolution is a slow process. We see the results only when we step back with a wider lens. It's like raising children. We can't see a physical change from one day to the next. But we sure see a difference in how they looked on their 3rd birthday vs age 8.

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companies more highly than their traditional counterparts. Would you rather hold stock in a company valued at 8x revenue or one valued at 2x revenue? Why did a leading marketing services vendor take an incredible leap of faith and move to a subscription and then to a SaaS model across their business in 2012? It was for the survival of the business (survival as defined by Wall Street in the form of valuation).

Now, every CEO in the world is under pressure to move their businesses to subscription. We also know that the move to subscriptions creates the need for customer success. Thus, the tipping point that has been reached in B2B SaaS seems inevitable for every business on the other side of the chasm. It's just a matter of time.

So, let's come back to the question of what will customer success be like this year. If you are at a SaaS company, your customer success discipline will have to mature and become more efficient for you to survive. It's not good business to throw human resources at a problem long-term. We have to run viable businesses and that includes the cost of managing our customer base with a high retention rate. For maturing SaaS companies, efficiency will be imperative.

This will also be the year when more companies move towards, or into, the consumption business model. With products like AWS or Azure, you only pay for what you use. In that model, the original sales transaction becomes less important and virtually all revenue is driven by making customers successful with what they've already purchased. As Amy Hood, CFO at Microsoft, recently said "In our Azure business, customer success is the only thing that matters."

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like raising children. We can't see a physical change from one day to the next. But we sure see a difference in how they looked on their 3rd birthday versus age 8.

This year we may not see anything truly dramatic changing in customer success. The birth of a movement is dramatic, but the steady development and growth are usually not. They are much closer to imperceptible than to dramatic. There are a few things to watch out for, although most are continuations of things already happening:

- ✓ Scale through automation
- ✓ The scope broadening into non-tech and B2C
- ✓ More process, less relationship
- ✓ CCOs ringing the bell at IPO time
- ✓ Expanding focus on growth, not just success
- ✓ 3x more people with "customer success" in their title
- ✓ Universities offering modules in customer success
- ✓ CEOs who come out of the customer organisation
- ✓ Direct correlation between retention rates and valuation
- ✓ Accelerated careers for those performing well in this new discipline
- ✓ Net Revenue Retention (NRR) becoming the defining metric of a SaaS company
- ✓ Melding of CSM, Product, Community, Advocacy, ABM, Customer Marketing, etc. to deliver growth

Good luck and remember that it's customer success we're after, not customer happiness.

Motives to Invest in

RAPID7

An interview with Devin Shane,
Senior Director Customer Experience
at Rapid7

There's a real trend towards the creation of customer success teams in high growth B2B tech businesses. What do you think has driven this?

I believe the step change is largely down to a fundamental shift in the economics of software businesses. We are now part of a subscription economy. In the old perpetual, on-premise world you might recognize 50% of a customer's lifetime revenue in year one. Whether software vendors like it or not those days are gone. In a subscription-based economy you are more likely to see 16% of a customer's lifetime value in year one. That delta highlights the important role customer success functions have to play in delivering sustained lifetime value. Customer success isn't just a 'nice to have' it plays an important role in the predictability of your annuity stream. When you think about the objectives of B2B tech businesses, particularly in their early stages, they might be looking to win funding or drive towards an exit. Investors will look at core metrics around customer churn and make valuations around the predictability of reoccurring revenue. Customer success, when executed effectively, can have a measurable impact.

Technology businesses are also waking up to the economics of successful customers. The reality is that happy customers are four times more likely to refer your offering to others and seven times more likely to try a new offering from your business. In a world where your prospects are prioritizing outcomes over features this level of customer advocacy is an essential growth ingredient for tech businesses.

CUSTOMER SUCCESS

How would you go about making the business case for investing in customer success?

In many ways you should approach this as you would any other business case. Think about the key sponsors. Think about the objectives of the business. The key players that influence investment in customer success will sit right across the C-Suite. You must work closely with them to understand how the organisation needs to be thinking differently. This needs to be positioned as a strategic investment and as such you should always be tying back to the high-level enterprise goals of the business. Understand where retention and growth play into your business model. If you are successful in delivering a measurable return, what does that mean to your CFO? How will that return help to reinvest into other priority growth areas of the business?

It's all about outcomes and truly being able to measure and demonstrate the value of the concept of customer success. I think about the Weight Watchers analogy. If the customer is seeing results they are far more likely to stick with the programme. The discussion needs to shift towards how we help our clients see lasting success. Highlight the importance of specialization. If the business has invested heavily in new logo acquisition, what are our plans to farm and maintain that annuity stream? Getting and growing are two completely different skills and organisations need to factor that into their interactions with the client.

What factors can hold customer success leaders back from implementing a successful programme?

A large part of ensuring customer success programmes flourish comes down to creating the right level of alignment. Roles and responsibilities need to be well defined both internally and externally. It's about driving towards a place of 'coordinated communication' that culminates with your

organisation presenting a single joined up voice to the customer. Focusing in on the people and process elements is essential. You need to find those points of friction in your customer facing processes. For example, I've heard of instances where clients are introduced to their new CSM on the same day a renewal is due.

This ties in nicely to my next point around being too focused on business outcomes when designing your engagement plan. Customers can see straight through a business that is interacting 'when they want and how they want'. Make sure you are reaching out about their goals not about your organisation's goals. To avoid these situations, you need to clearly define what you want your team to be and how you expect the entire business to behave in all customer facing interactions.

Customer success programmes can also be held back by not securing the right level of executive sponsorship. You need customer success to have credibility within the business to really influence the result. I've seen interesting instances recently where senior sales leaders have spent time running customer success functions. I really welcome this because it typically provides instant credibility for the function. Often that individual then moves back into the sales organisation leaving them better placed to engrain that culture of customer success within their teams. You need champions for customer success across your business, the more you have the more successful you will be.

What technologies should customer success leaders be exploring to enable the end-to-end process?

There is a lot of great technology out there that can unlock the potential of your customer success team. For example, there are loads of great collaboration tools that can serve a purpose of bringing teams together to interact around topics and issues but don't work as well as a system of record. Customer success is a data-driven discipline. I'd suggest eating your greens first in terms of putting a solid data strategy in place. You need to facilitate that single view of the truth to understand all touchpoints and product interactions. That insight needs to be accessible across all parts of the business. You can't build a frictionless process when data lives in spreadsheets and siloed systems.

Once you have a solid strategy around data and CRM then you are far better positioned to leverage the insight provided by customer success platforms.

The typical outcome you'd expect from investing in this space is great, data-driven prioritization. It will help you inform workflows, surface trends in product usage and identify 'at risk' clients. You can also open the door to areas like self-service, because after all customers want you to understand who they are and empower them to be successful. That doesn't necessarily have to equate to lots of face to face account reviews. Change the conversation towards enabling customers by their preferred method of interaction not yours.

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Do you believe that customer success functions help to create competitive advantage?

Customer success is definitely a vehicle to create competitive advantage and I think that comes from a shift in what buyers are looking for. Prospects no longer assess B2B providers as products with features, they look at outcomes and value add. They want to know how you've helped clients that look just like them. They want to understand what people in their sector are focused on improving and the results they are achieving. If you are doing the right things in customer success, then all of these invaluable pre-sales insights become more readily available. I think another important thing to point out is that whilst business success is important it's also about creating professional success for our key contacts. It's that professional success that creates champions and referrals wherever that individual goes in their career.

Some boardrooms are seeing the value of customer success already, but there is room for growth. There are lots of organisations in the cycle of creating a function, but few have reached a high level of maturity. I mean that more in terms of tangible impact on the business. It's interesting to see though that some of the most disruptive SaaS vendors out there were born with customer success as part of their core DNA. This has posed challenges for the more established vendors who have lots of legacy systems and processes to contend with.



How do you go about sharing customer facing information/feedback with the rest of the business?

It's important to have a strategy around what you want to learn. Be proactive. What are the low value, painful interactions that your customers are having with you on a regular basis? Make insight digestible to the business and put clear action plans in place around how you are going to execute against those themes. I'd always recommend following a listen and action model where you sit with the exec team on a quarterly basis and prioritize with their support. Where hard feedback needs to be delivered back to the business it's often helpful to tie things back to your brand promise. This takes away the finger pointing. It's not the fault of the sales team or the product team, it's simply a case of the collective not living up to the brand promise. That makes for far more productive, meaningful and strategic conversations that lead to executable actions.

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Measuring the success of



**An interview with Catriona Wilson
Manager, Customer Success at Adobe**

How important is it that the objectives of the customer success team align tightly with the objectives of the business?

I would absolutely agree that the objectives of the business and the customer success function need to align. It's about having a vision in place from senior leadership that puts a firm focus on value realization for customers. If that doesn't exist your customer success function is always going to experience internal friction and challenges. The organisation needs to be invested in not just customer success as a team or function but customer success as a way of doing business. That means holding every employee in every business unit accountable for their relationships and interactions with the customer. Ultimately our role is about understanding our customer's challenges and bringing the right people to the table to make them more successful than they ever imagined possible. The whole organisation needs to work together to support the customers success.

Taking it a step further though, it's not just about customer success aligning to the objectives of the business – it's also about aligning to the objectives of our customers. CSMs should be accountable for creating a mutual success plan with the customer and proactively driving that agenda. It's about understanding the client's business challenges and helping them overcome them. That's our core purpose. That means engaging at a strategic level as well as on tactical day to day issues. That often involves bringing our own executives to quarterly business reviews to encourage that level of peer to peer exchange and strategic discussion. As I've said before customer success is a team sport and the willingness of your senior leaders to attend these meetings tells you everything you need to know about their engagement on the issue.

CUSTOMER SUCCESS

We've seen a trend towards customer support teams being rebadged as customer success teams, what are the challenges with this?

I think this largely depends on the type of customer success team you are trying to create. Are you asking your CSMs to support 5-10 strategic customers proactively or manage 30 plus clients and their associated tactical issues? If you are trying to create the former, then simply rebadging your support team isn't going to create the right outcomes for the business. CSMs should never

really be fixers. They need to understand the product but not fix it. Just as they need to understand the commercials but not sell them. As soon as customer success becomes a support function then you are just opening and closing tickets. Customer success is about strategy. If all you are doing is running a support desk, then it becomes incredibly difficult to elevate the discussion from the tactical to the strategic. Time spent closing tickets ultimately takes away hours that could be better used bringing the right resources together to drive the customers long term success.



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What are the most important metrics you look at when assessing the performance of your function?

One of the first metrics a customer success team should look at closely is adoption. Nobody wants to be that 'gym membership purchase' where you sign up with great intentions but never really make use out of it. SaaS businesses are at a huge advantage here because of the amount of user data that's available. The key is to leverage that insight effectively. What parts of the solution are they using? Which use-cases have they prioritized? What progress are they making? Adoption scores can be benchmarked by industry sector and play a key role for CSMs in identifying risk which allows us to be more proactive. If adoption scores are

low, we quite simply aren't being proactive enough as a team. We also get our customers to assess themselves by completing maturity assessments which is a good way of gamifying the adoption process.

It's not all about data though it's about actions too. For example, I'd expect a high performing customer success function to have a mutual success plan in place for every client. CSMs need to be accountable for flagging risk early against a clearly defined profile. In that event, a detailed action plan needs to be put in place. This can be a very time-consuming process which is why you would typically have a low CSM to customer ratio. The focus here is on our own proactivity but it is also important to hold our customers accountable for how we improve and personalize our service to them.



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What do you need to put in place as a manager to create the right environment for a customer success team to thrive?

I think the important thing to remember is that your team is likely to have entered into customer success from a broad variety of backgrounds, whether that be sales, product management or technical support. They may have been part of other businesses that deliver customer success in a completely different way. That makes it essential to be clear on what the focus of the team is. What are we here for? What are we going to drive? Being clear about the vision and objectives of the function gives the team something to get behind and an identity within the broader organisation. It's important to remember that not every individual is going to 'do customer success' in the same way. That's okay, skills will vary. That makes it key to find the right CSM for the right customer.

Outside of the customer who are the most important stakeholders in the business for customer success and why?

Stakeholder management is a really important part of building a successful function. Buy in and engagement from across the business is an essential ingredient in making sure we can present a joined-up service to the customer. We need to work effectively with senior leadership to align to the vision and strategy of the business and regularly validate priorities. We need to create a feedback loop with product management to enable valuable customer insight to be passed back into our roadmap. But for me the relationship with sales leadership should always be high on the priority list. If you have a Sales Director that doesn't buy into customer success, then you have a problem. Regardless of reporting lines the Sales Director should see customer success as part of their job and feel like part of your team. In terms of the best reporting line for customer success, I think it can be helpful to avoid reporting into a commercial function. Taking away that conflict of interest is important. Organisations will vary in terms of size, shape and maturity towards customer success but often the VP of Services is a sensible reporting line providing alignment to the entire pre and post sales process.

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How do you go about moving a customer success function from a reactive to a proactive place?

Moving towards a proactive place means defining a starting point. Don't try to fix everything at once. You need to deliver consistent measured results to your sponsors based on their priorities. The language needs to change from 'saving' customers to proactively creating success stories. The process of moving from reactive to proactive is about being far more data-driven. You can't be successful in customer success until you truly understand the state of your own business. What are the themes and trends? What reoccurring risks are you seeing? Scrutinize

the data to ensure you are focusing on the right things and can demonstrate a measurable return on your time.

You've also got to ensure that you have the right team in place and that you are managing performance effectively. This is not necessarily about holding them to a number, but clear objectives and development plans need to be in place. It's hard to find good CSMs, for every 30 CVs you see you might take 2 to interview, so staff retention should be an important part of a proactive strategy.





An interview with Easton Taylor, Director of Customer Success at Gainsight

Building a customer success function can be a daunting task. It is also very exciting because, if done well, it will change the perception of your company by your customers, your investors, and your own employees. Few things can have that breadth of impact. Here are ten fundamental tips you should take into consideration:

1 Don't build the function until you develop executive support.

Most customer success initiatives fail because the necessary support from the top is not really there. There's a reason that "it's a top-down, company wide commitment" is the First Law of customer success. You just cannot succeed without it. It requires investment and making tough decisions. As an example, saying "no" to a possible sales deal because you don't believe you can make the prospect successful is, at most companies, a decision only the CEO can make. But it's a decision that may need to be made because the cost of signing up the wrong customer is enormous.

Top Tips for Building a

CUSTOMER SUCCESS FUNCTION



2

Make sure everyone internally knows what customer success is.

Human beings are great at pattern-matching. We meet someone with a certain title or style and we immediately pattern-match them to others we've known with that same style or title. This isn't always right, but it's human. Your colleagues will do the same with customer success. Sounds a lot like "customer support" so it must be a rebrand of support or an extension of support or perhaps premium support. It will take some effort to teach your colleagues what customer success truly is.

3

Make sure the customer success leader sits in the right place on the org chart.

Org charts reveal priorities. If customer success is buried 9 layers down under the Sr. Director of Sales Ops or Customer Support, it tells the company it is not that important. Position on the org chart also conveys authority. And whoever runs the post-sales group will need the authority to change things and ruffle feathers. When customer success is done well, it creates a lot of (healthy) organisational tension. Embrace it and authorize it by where it lands on the org chart.



4

Assign the retention number to the customer success.

No one would ever run a company without giving ownership of the sales number to one individual. Treat your retention number the same way. Give it to one person with the authority to go shake things up to make it happen. And remember that the person who owns the number does not need to own the associated transactions. In other words, the sales team does not need to be accountable for net retention in addition to their renewals and upsells targets.

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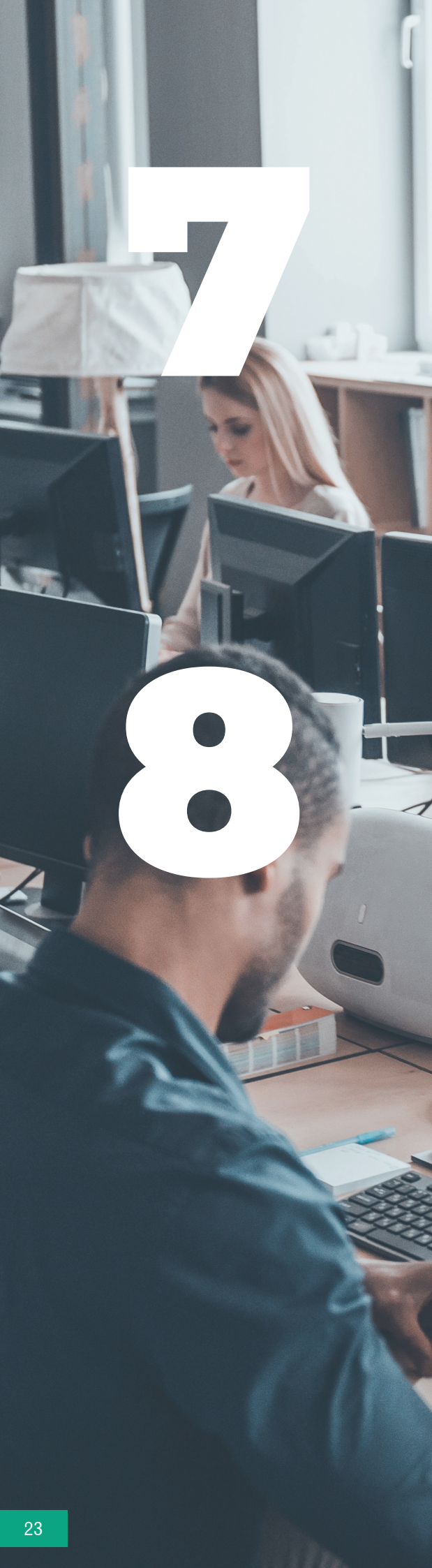
Make sure the company celebrates customer success.

Every company has a sales gong, bell, or air horn. A new deal deserves celebration. So does a renewal, an upsell, a case study, or a reference. Make sure good things that happen in your customer base are being celebrated alongside those new deals. This tells the company that customer success is pretty important, too.

6

Make sure the investment level and expectations are reasonable.

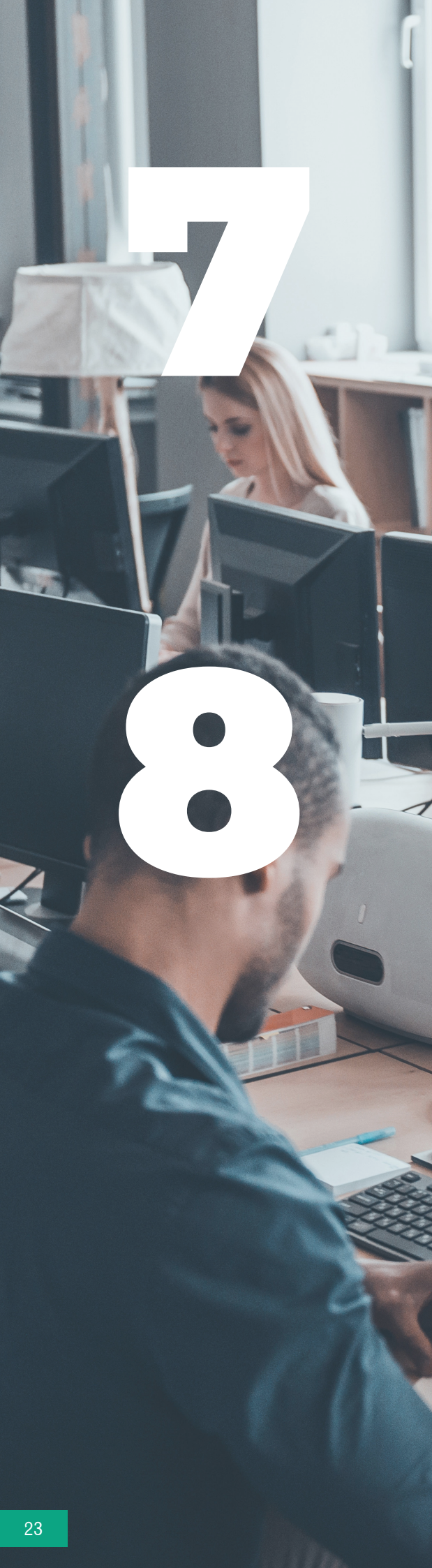
If the commitment to customer success is £50K for 800 customers and the expectation is 125% net retention, walk away quickly. That is lip service, not commitment. Early stage companies often need to invest 20%+ of ARR into customer success to plug product and process gaps. Over time that might come down but don't let it go below 10%. It's fine to try to be a hero with less but it isn't worth the pain.

A large white number 7 is overlaid on a background image of an office. In the background, a woman with blonde hair is sitting at a desk with multiple computer monitors, looking down at her work. The office environment is modern with wooden desks and various office supplies.

7

Organize for scale.

Find over-qualified early hires. People who can manage a reasonable number of customers in 50% of their time. And then make sure the other 50% of their time is spent creating processes or changing whatever is necessary so it will work when you have 5000 customers and 38 CSMs. Don't just throw young firefighters at the problem.

A large white number 8 is overlaid on a background image of an office. In the background, a man with a beard is sitting at a desk, looking at a computer monitor. The office environment is modern with wooden desks and various office supplies.

8

Technology at the right time is invaluable.

Much like we've used CRM systems to institutionalize our knowledge of prospects, we need to use systems to institutionalize our knowledge of our customers. How well you know your customers will be a major differentiator in your market. You cannot build institutional knowledge of your customers through emails and anecdotes. It has to be systematized. You probably will not need a technology system when you have 1 CSM and eleven customers, but the minute someone asks about a particular customer and three people turn to look at each other wondering who talked to them last, start thinking about having a system.

A large white number 9 is overlaid on a background image of an office. In the background, a man with glasses and a blue shirt is smiling and looking towards the camera. Another man is sitting at a desk in front of him, looking at a computer monitor. The office environment is modern with wooden desks and various office supplies.

9

It's not a relationship job anymore.

Don't get fooled into thinking you can win in customer success by building great relationships with all of your customers. That's possible when you have 20 but not when you have 200. It has to be a process, metrics, and value-driven job. If someone can build great relationships, too, that's awesome. But be wary of those who believe that's their greatest strength because they'll go back to it in times of stress and it will ultimately fail them and you.

A large white number 10 is overlaid on a background image of an office. In the background, a man is sitting at a desk with a computer monitor, keyboard, and mouse. The office environment is modern with wooden desks and various office supplies.

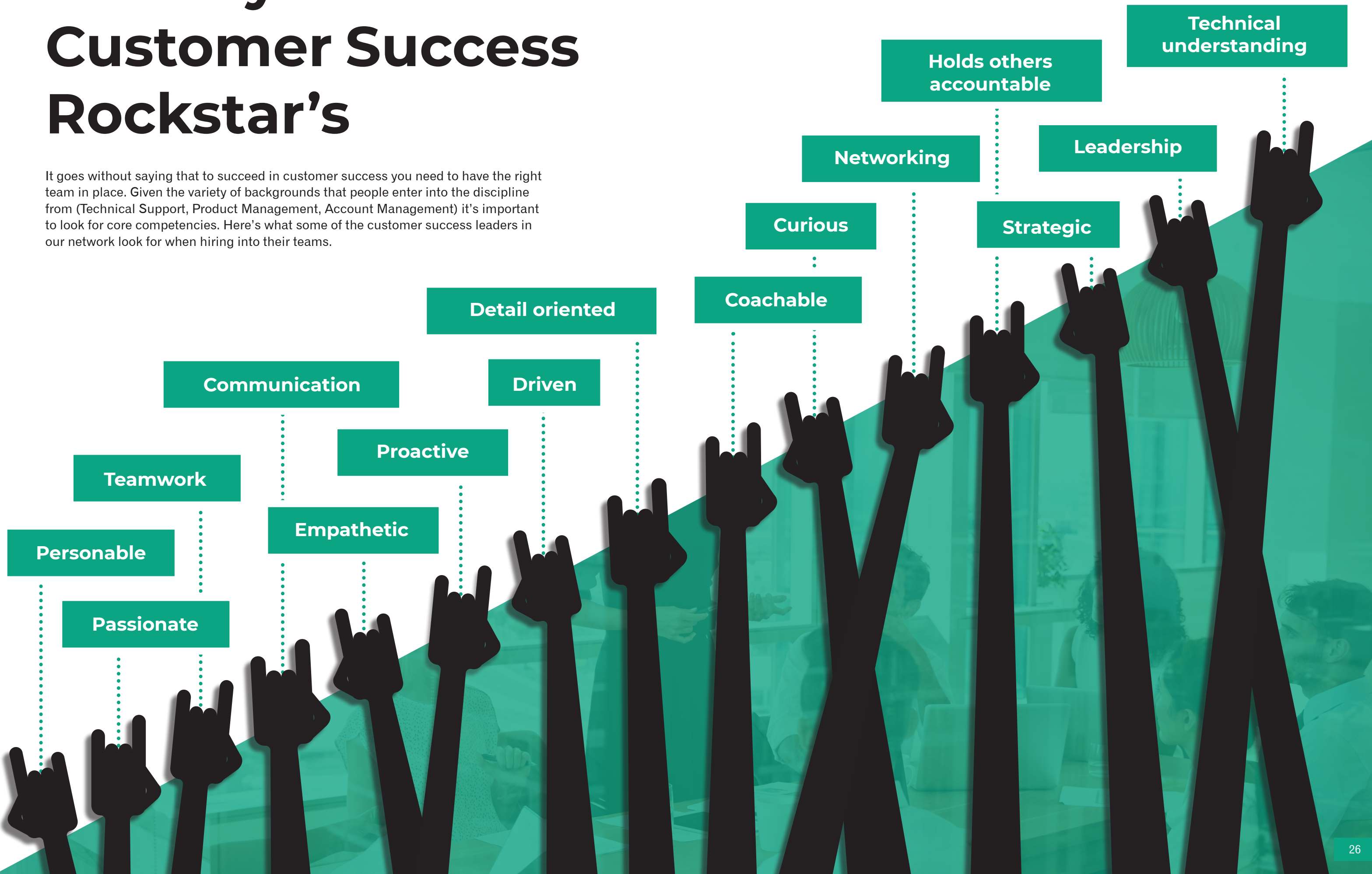
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Combine domain expertise and product expertise.

CSMs can't be air traffic controllers. They need to bring very specific skills to their customers and domain expertise and product expertise are at the top of the list. Domain so they can speak the customer's language and have true empathy. Through that, they will build credibility. Product expertise is crucial because the core of their job is to deliver higher value to the customer through the product(s) they've purchased from you.

The Key Traits of Customer Success Rockstar's

It goes without saying that to succeed in customer success you need to have the right team in place. Given the variety of backgrounds that people enter into the discipline from (Technical Support, Product Management, Account Management) it's important to look for core competencies. Here's what some of the customer success leaders in our network look for when hiring into their teams.



5

Curveball Interview Questions for CSMs

**Tips from Giles Daniels,
Director & Co-Founder,
Stott and May**

The primary objective of any interviewer is to make sure you get the best out of every candidate you meet, but sometimes it's interesting to throw in the odd 'curveball' question. These questions are designed to help you get a deeper level of insight around candidates and their potential. Due to the broad range of backgrounds and skillsets migrating towards the area of customer success, it will sometimes be necessary to find potential diamond candidates in the rough. We asked our network of hiring managers to give us some of their curveball questions, and here's our top five.

1

Tell me about yourself...

This is a great interview question to open with when interviewing for a CSM simply because it is so open. It helps to identify whether your candidate has the 'qualifier' trait. Will they ask you to narrow down the question to relate to their work experience or personal interests? Or will they launch into a 10-minute narrative around their life story? CSMs need to be strong communicators and that means being able to qualify a requirement and adapt their response accordingly. CSMs are problem solvers by nature and this question helps to separate those that can get to the detail of a customer requirement from those that can't.

2

Put the following in priority order: the business, the customer, yourself...

There's likely to be a bit of a debate as to the right answer to this question but ultimately, it's a bit of a confidence test. Hiring managers have told us that 99% of candidates will place the customer as number one priority. That stands to reason. They've applied for a job in customer success and want to put the client at the heart of everything they do. But are they just telling you what you want to hear? Are they likely to have the confidence to push back on a customer or hold them accountable for actions? It's great to be passionate about the customer but hiring managers tell us it's the confident 1% that put themselves first, to do their best for the business, to meet the requirements of the customer that often go on to be the real success stories in this discipline. Those that answer in this way demonstrate an important 'leadership' trait by their willingness to stand out from the crowd.

3

How can you tell whether a customer is happy or not?

This question opens the door to understanding whether your candidate is data-driven or will simply take things on face value. It's the proactivity test that uncovers the 'forward thinking' trait. Strong candidates will come back to you with answers around the hard statistics of user adoption rates or how the customer is progressing against their mutual success plan. They may even mention the new use-cases that a client has potentially unlocked or how the customer is assessing their maturity against industry benchmarks. It's this level of factual discussion that helps separate the proactive from the

reactive. The danger of a face value approach is that by the time a customer is telling you that they need to be 'saved' it's often too late to save them. CSMs may come into an interview pointing to how they've saved a customer, but the reality is that it should never really get to that stage. One hiring manager we spoke to stated that we are not looking for heroes in customer success to come in and save the day. We need individuals that will avoid the need for last minute heroics through proactive behaviors.

When was the last time you asked someone for a favour? What did you need? How did you go about it?

One of the primary responsibilities of a strong CSM is to bring together the right internal resources on behalf of the customer. That means we need to identify the 'networker' trait in a strong candidate. The ability to build relationships is a pretty hard thing to teach and candidates who possess this as a core competency will be at a distinct advantage in this discipline. Focus in on how the candidate brings other stakeholders on-board with their agenda. How do they win the hearts and minds of others? Are they committed to building sustainable relationships? Being successful in customer success is all about bringing the right people to the table at the right time.

How many customers do you think you should manage?

This is an interesting question, particularly for candidates who have previous experience in working within customer success functions. The response is going to give you an indication of the type of customer success manager they are at the moment, whilst also highlighting potential areas of development going forwards. We are looking for the 'strategist' trait here. If the candidate responds with a relatively low number of customers (say 3-10) then you know you're likely to be dealing with someone who has taken a fairly proactive, hands on role with clients in the past. That leads the conversation on nicely to the associated best practices of managing a very targeted set of strategic accounts. If it's a high number (we've heard numbers as high as 120 accounts per CSM) then it might be a case of understanding how they've found that type of environment and how much value they've really been able to add whilst being stretched quite thinly. It's obviously not a candidate's fault if they've come into a high volume customer success function, but at that point you've got to hone in on whether they'll be strategic enough or proactive enough.

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About Us

Founded in 2009 Stott and May are a professional search firm with a passion for helping leaders achieve complete confidence that they have hired the right talent, first time in fiercely competitive markets. We believe you should never have to make the choice between quality of candidate and time to hire.

As a result, our business has been founded on the principle of offering a premier standard of search service delivered in vastly accelerated timescales, that our competition simply cannot match. Because after all this is about more than just recruitment, it's about turning your business vision into reality.



About Stott & May.