Architecting Your Customer’s Success
Apart from the sale, customer success is the most important phase of the B2B customer journey experience (CJX). This is the stage when you build trust by onboarding new customers to the products they’ve spent thousands, or even millions, of dollars on. It’s when you help them adopt and utilize your service to its maximum potential. Ultimately, it’s when you ensure your customer is better off than they were prior to working with you.

But to accomplish this, you need to know your customers like the back of your hand. What makes that very complicated is the fact that every customer is unique, especially in the B2B space where expectations vary widely and can even differ between multiple stakeholders within the same company. Do you really know what constitutes “success” for each one of them, and how you can meet and exceed their expectations in order to build a long-lasting and fruitful relationship?

For some customers, success might be defined purely by ROI. For example, can the CFO see a 5x return? For others, success might rely on some specific milestone, such as whether a deployment timeframe meets a critical project need. For another customer, success is more about the ease of doing business—is a system simple to use, and is support easy to engage?

According to Salesforce, 76% of customers expect companies to understand their needs and expectations, and 70% say understanding how they use products and services is critical to winning their business. Customer expectations have never been higher, and as the subscription economy takes hold within the B2B marketplace, you need to be ready to answer the call – or risk losing business.

This is where customer success planning comes in. A customer success plan is a comprehensive document based on the mutual understanding of expectations between you and the customer. It is a clear statement of the value you will bring to the CJX, and outlines the strategy you will take to achieve that.

**The Path to Growth**

Coming into the relationship, customers will have all sorts of expectations. They might want a product to be operational within a certain time frame, to have gained a certain number of active users, or to have generated a specific ROI for the company.
An effective customer success plan takes all of these expectations and explicitly specifies the tasks and deliverables to achieve the desired outcomes. It provides accountability at every point along the CJX, so that everyone’s focus remains the same: consistently meeting the customer’s expectations – from onboarding to adoption to delivery and everything in between. The plan provides a clear roadmap to value and something to measure against, and becomes the customer success manager’s (CSM) key tool for aligning resources, ensuring they run the right plays for the right customer at the right time.

You may be reading this and thinking you don’t have the time and resources to develop and execute a customer success plan. But most businesses don’t have the luxury of accepting high churn rates. Research shows that it’s five times more expensive to acquire a new customer than keep one you already have. That’s why if you’re truly committed to expanding the lifetime value of your customer base, you can’t operate with such a shortsighted mindset. By embracing customer success planning, you’re actually streamlining your efforts to save resources, create more time for proactive customer interaction, reducing reactive scrambling when something goes wrong, and fueling long-term revenue growth.

**Customer Success Plan Applications**

- Verifies that expectations are being addressed
- Addresses potential exceptions
- Communicates priorities and evaluation criteria
- Aligns with customer on the definition of success
- Scores customer success metrics
A Step-by-Step Guide

If you’ve never created a customer success plan before, you’ll likely be wondering where to begin. We’ve put together a detailed five-step guide to help get you started.

The customer success plan should include the following elements:

1. **Identify Expectations**
   - You want to go above and beyond for your customer. But if you’re focusing your precious time and energy on the wrong areas, you won’t be appreciated, rewarded, or kept around for very long.
   - To avoid this scenario, start by having a frank and honest conversation with your customer. This assessment is critical to getting things off on the right foot, so ask as many questions as you can upfront. What are their general expectations and goals for the relationship? What initiatives are most important to them? What areas are not as important that you should avoid focusing on?
   - Having this conversation early on provides the opportunity to build rapport, understand your customer’s most critical needs, and start appropriately managing expectations.
#2 – Map Processes to Meet Expectations

Knowing in advance exactly what you need to do to meet expectations will allow you to more intelligently allocate resources, leading us to our next step – mapping the specific processes to fulfill those expectations.

A large portion of the customer’s expectations can be taken care of by your standard onboarding, adoption and delivery procedures, which you refine and improve over time. But as we said before, every customer is different and many will have expectations you’re not used to answering. These are known as “exceptions,” and must be addressed by a unique approach.

Because exceptions aren’t typical customer expectations, you won’t have a standard plan to deal with them appropriately. As you guessed, exceptions cost more to implement because they are out of the norm, and are more likely to be overlooked by CSMs.

For example, to hit their quarterly revenue goal, a customer might expect your onboarding to be completed in half the time you would normally allocate. By identifying this exception in advance and proactively managing it, you put yourself in the position to drive better outcomes and further build trust with the customer.

**EXAMPLE**

![Diagram showing customer expectations and processes](image-url)
#3 – For Each Expectation, Define Metrics and Goals

Metrics are the empirical evidence that demonstrate whether or not you are meeting each expectation. If you can’t measure what you’re doing, you can’t prove your value and worth to the customer. So even if your customer success team accomplished everything it set out to, you could still be on the chopping block if you can’t show how your business actually moved the needle.

Choosing the right metrics is imperative, because team members will focus the vast majority of their efforts on meeting them. The wrong metrics will no doubt lead to wasted time and undesired outcomes. For example, if onboarding is measured based on total training hours delivered, there might be a temptation to take the lazy way out and deliver a one-size-fits-all training program, as opposed to persona-based training that matches actual needs.

In some cases, expectations aren’t as easily measured. These can be more emotional, and analysis of the results will tend to be more subjective in nature. However, you still need to track your progress against them. For instance, a customer may expect users to find the product intuitive to use. One way you could measure this would be to identify indicators that users are adopting the solution quickly and easily finding the core features. Metrics for “Intuitiveness” might include loyalty and feature usage statistics.

As a final note on this step, be sure to keep goals realistic and communicate that to the customer. Some might say “under promise and over deliver.” Whatever you call it, don’t make the guarantee that you’ll reach targets that you aren’t confident you can hit. If you miss them, it’s a surefire way to erode the valuable trust that you’ve spent so much effort trying to build.
When you assign the responsibility for an expectation, you are identifying the specific CSMs or cross-functional teams that will monitor and ensure your attainment of the goal. These should be talented and committed folks who you have the utmost confidence in – they are managing your most important relationships after all. Make sure you can trust them to exceed expectations.
CUSTOMER

EXPECTATION
- Onboard Quickly
- Intuitive to Use
- Good Value

PROCESSES
- Provisioning & Configuration
- Feature Discovery
- Quarterly Business Review

METRIC
- Time to Deployment
- Future Coverage
- ROI

GOAL
- 60 Days
- 75%
- 5X

RESPONSIBILITY
- Ann Hana
- Andy Grygiel
- Noble Woods
#5 – For Every Goal, Establish a Schedule

Knowing when an expectation must be met is just as important as knowing what the expectation is. Just like your goals, the schedule must be realistic. Otherwise you’ll have low-quality deliverables and a burned-out staff.

Instead, take the learnings from your initial conversation with the customer to understand their goals and how you can reasonably achieve them. Build out a schedule that you feel confident you can stick to, agree to that schedule (with both your CSMs and customers), and get to work making it happen.

Putting Plans into Action

Now that we’ve outlined the steps to construct an effective customer success plan, there’s a few related points we need to address to help operationalize it.

Over time, you can simplify the entire process we just covered by building a library of customer success plan templates based on previous relationships. A template will not just reduce the time needed to get the customer up and running, but it will drive best practices into action, help you avoid errors, and ensure consistent quality.

These templates can help you identify what has worked in the past, examine what hasn’t, make incremental improvements, and better serve new customers. Just like in your personal life, you can take learnings from the past to improve your future prospects.

The Tech That Makes it Work

The right technology is crucial to executing any customer success plan. There is simply no way you can manage all of the different expectations, exceptions, metrics, goals, and responsibilities, not to mention scaling it across hundreds or thousands of customers, without implementing a robust tech stack.

At every single touchpoint along the CJX, your team should be collecting and maintaining the insights and data that will help you build a 360 degree view of the customer. With most CRMs, you can track every assignment down to the details of
who will do what, when, where, and how. Record your results, both objective and subjective, and you can start reporting on the customer success indicators you've gathered.

Capturing this information helps you track progress and measure success – table stakes in today's analytically-driven world. However, the right tech will not just do that. It will also make proactive recommendations based on the information you've been gathering. It can identify the customers most at risk, help you understand how to fix those relationships, and better serve them going forward.

**Communicating Progress**

Regular communication of how well – or not – you are executing the customer success plan is essential to the long-term health of the relationship. Understand your audience’s communication preferences and develop the right strategies and cadences to meet their needs. Tailor the content and detail to their level of knowledge and experience, and be sure the medium is appropriate – executives might prefer verbal briefings while others may be fine with a simple email.

In addition to regular communication, schedule periodic reviews to obtain qualitative customer feedback on your own performance. To gather this, you can deploy a survey via email, hold an in-person quarterly business review, or set more informal checkpoints that will help you stay in sync – whatever works best for the customer.

**Maximizing the Lifetime Value of Your Customers**

There are as many different definitions for success as there are customers. To deliver personalized success at every point along the CJX, not to mention at scale across your entire customer base, you need to strategize and execute bulletproof customer success plans that will not just consistently meet, but exceed, expectations.

ServiceSource’s [Customer Success](#) solution is powered by the right mix of talented CSMs, processes refined over two decades of experience, and an advanced tech stack that helps the world’s greatest brands create customers for life. [Reach out](#) to learn how we can help you plan your way to better customer journey experiences.