



Twice As Nice: Being Pragmatic Whilst Onboarding CS Technology At Two Companies



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INTRODUCTION

WHY DID WE INVEST IN CS TECH?



AUTOMATION

- Help make CSMs manage more customers in less time
- Build customer journeys
- Gather data from disparate sources



STANDARDISATION

- Playbook management for common activities
- Reduce ramp time for CSMs
- View customers through a consistent lens



ALERTING

- Give access to leading indicators of issues
- Review lagging indicators (health)
- Challenge Product-Market Fit assumptions

PRE-IMPLEMENTATION

HOW DID WE GET STARTED?



TOOL SELECTION

Requirements, Demos &
Negotiations



SALESFORCE

Fresh installation, tidy data



TRAINING

Complete the mandatory GS
modules



STAFFING

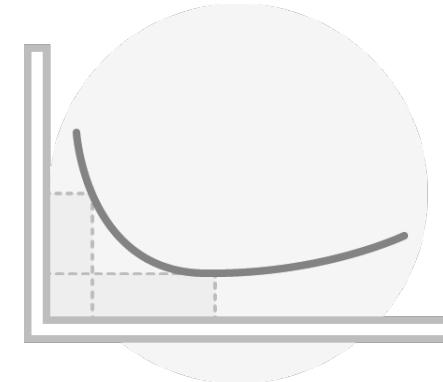
Make time for the team to make it
successful

WHAT SHOULD THE AIMS OF AN IMPLEMENTATION BE?



GET YOUR MINIMUM FUNCTIONALITY

Identify what 'phase 1' of implementation looks like- but be prepared to change tack!



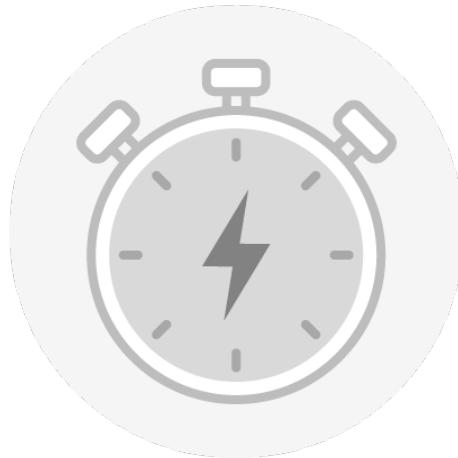
BE COMFORTABLE TO DO LATER STAGES YOURSELF

Your implementation is the time to try things and let it fail- your implementation manager can educate and fix things!

DO YOU UNDERSTAND YOUR DATA?



Where do you want to pull data from?



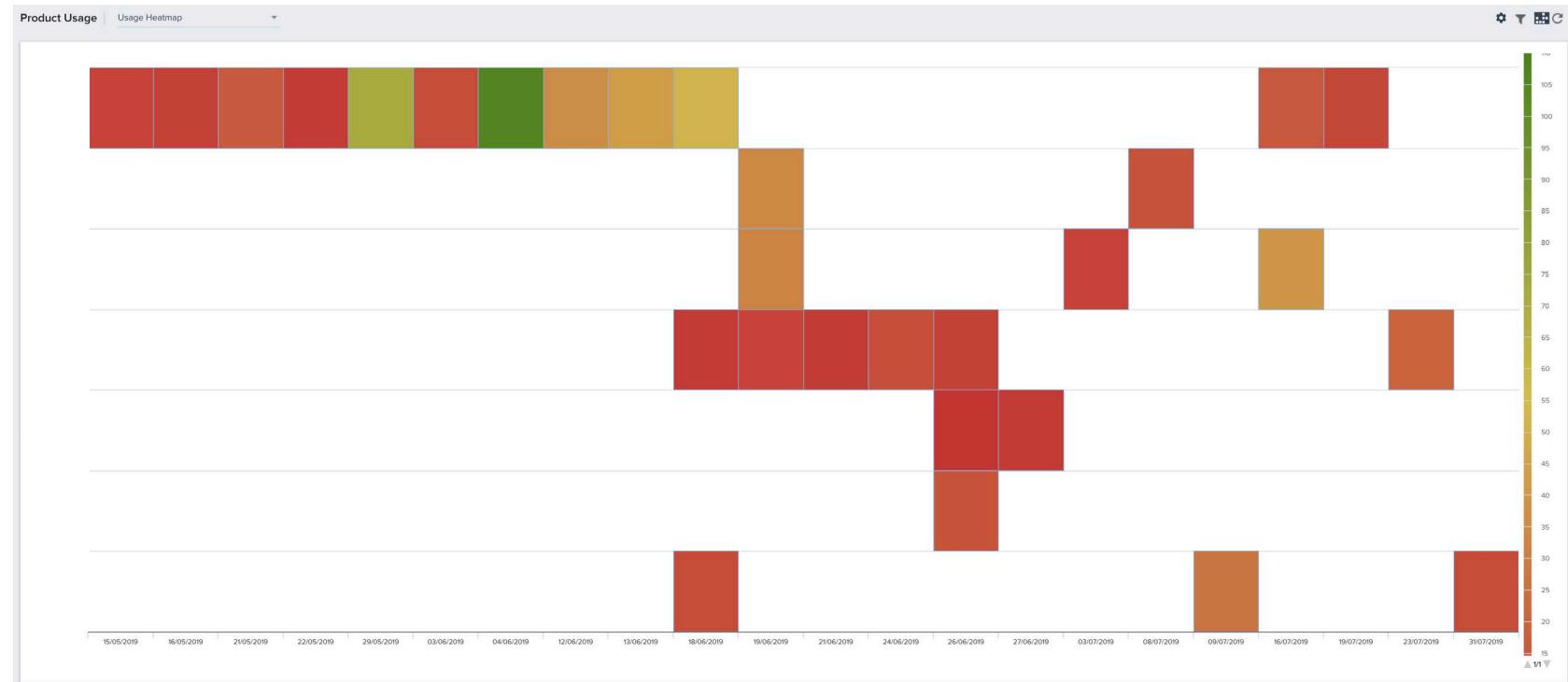
What format and frequency?



What do you want to do with it?

TOP TIP!

VISUALISE YOUR DATA AS EARLY AS POSSIBLE



IMPLEMENTING

FOCUS YOUR FUNCTIONALITY.



LIFECYCLE

The basic building block.



HEALTH SCORES

Get a sense of your risk.



PLAYBOOKS

Destroy your wiki!



CTAS

Treat these as 'leading indicators' of health.



NPS

Understand what your customers are thinking.

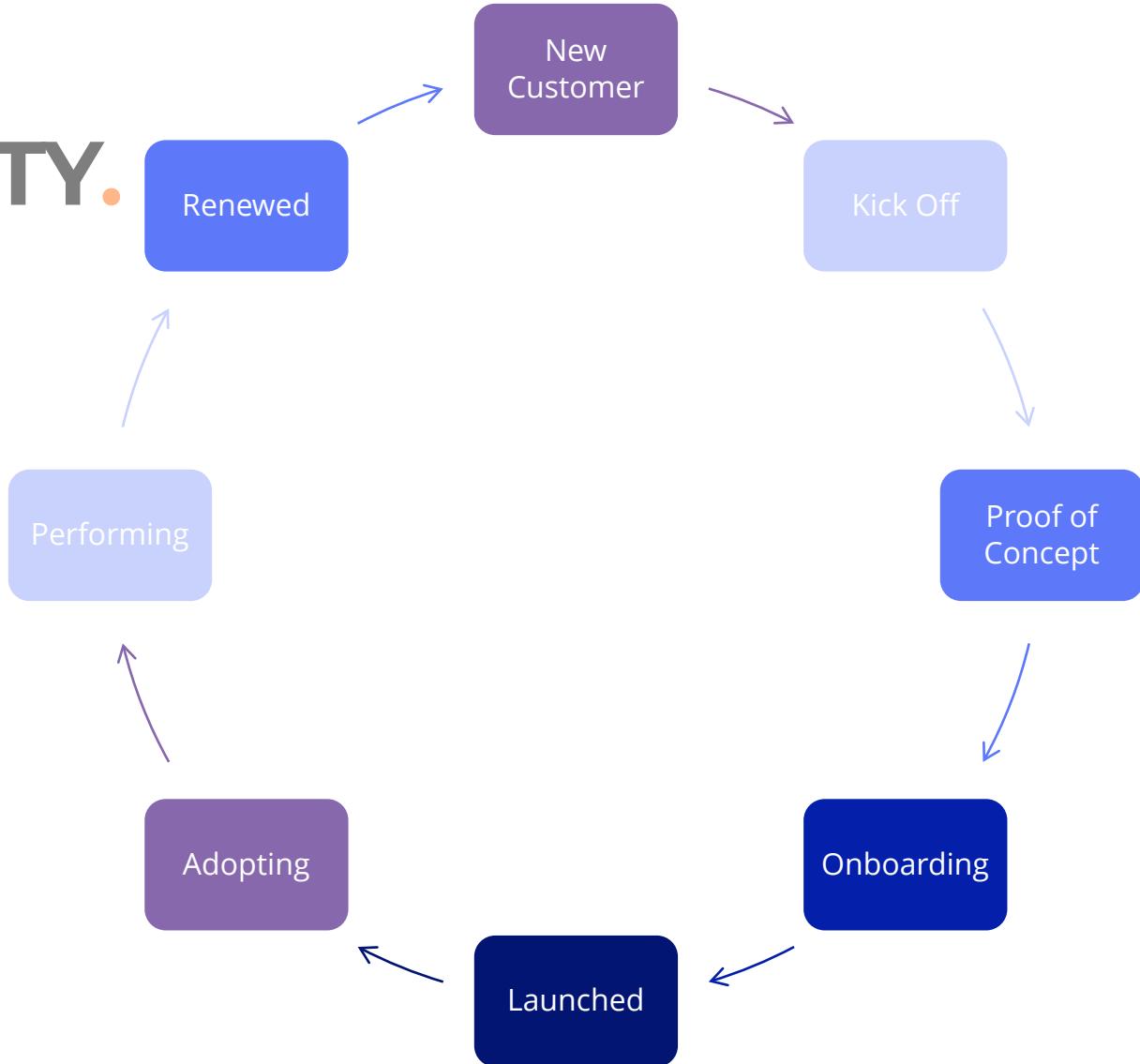
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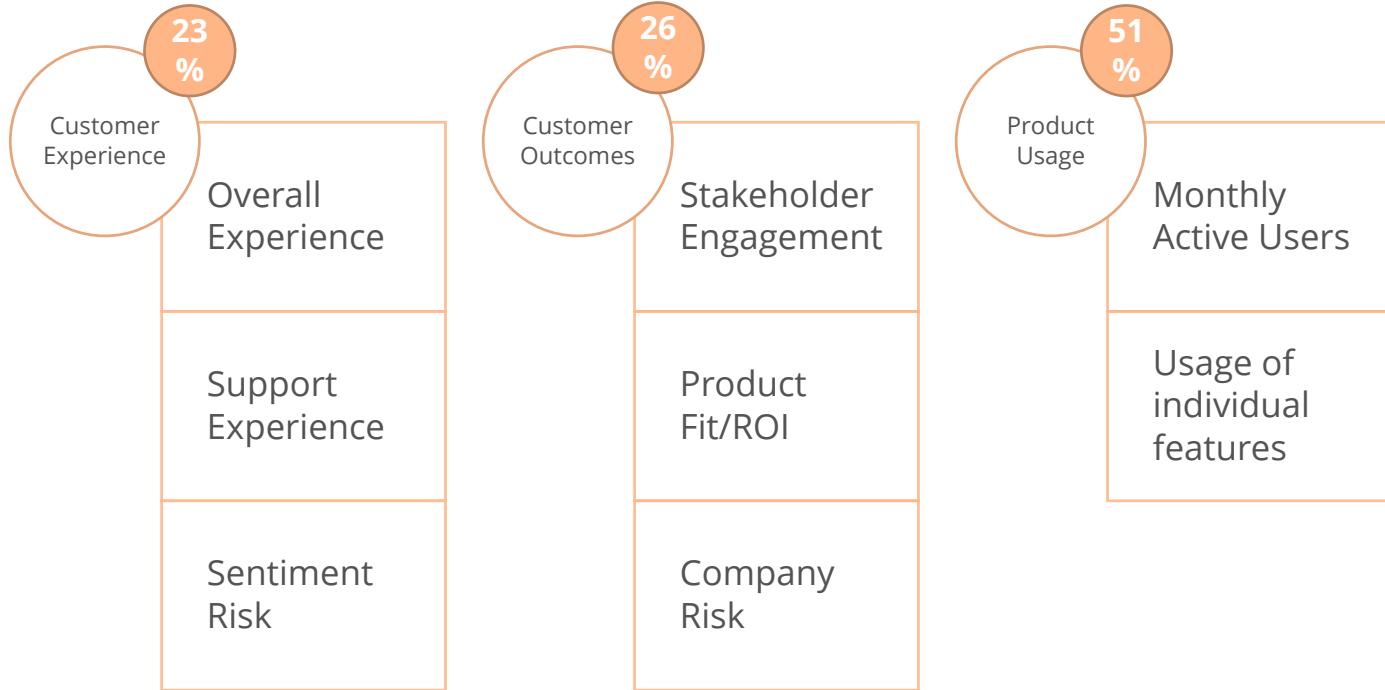
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→ Check declining deployment for [REDACTED] Limited

[REDACTED]

04/11/2019

TIMELINE **CUSTOMER** **CALL TO ACTION**

Reason:	Usage Drop
Priority:	Medium
Status:	New
Account:	Limited
Type:	Risk
Created Date:	01/11/2019
Comments:	The deployment of [REDACTED] Limited is reducing week-on-week. Check in to work out why.

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Give your CSMs
actionable information
they cannot get
anywhere else!

MONITORING SUCCESS.

There's no point launching something and then forgetting about it- how can you engage the team?

POST LAUNCH

BUILD INTO PROCESSES

Make a dashboard for 1:1s, review Gainsight 360, run Customer Health meetings.

TRAIN AND ENGAGE

Train little and often- Tell everybody in the business how they can leverage the new stuff.

CONTINUE TO DELIVER

Crowdsource ideas for new reports, alerts and functionality. Seek High Impact, Low Effort.

LESSONS LEARNT

HOW WOULD WE DO IT DIFFERENTLY NEXT TIME?



PLAN

- Get the operating rhythm right
- Acknowledge Implementation manager is doing many!



PREP DATA

- Build data exports before kicking-off
- Understand what you're looking to measure



SCOPE

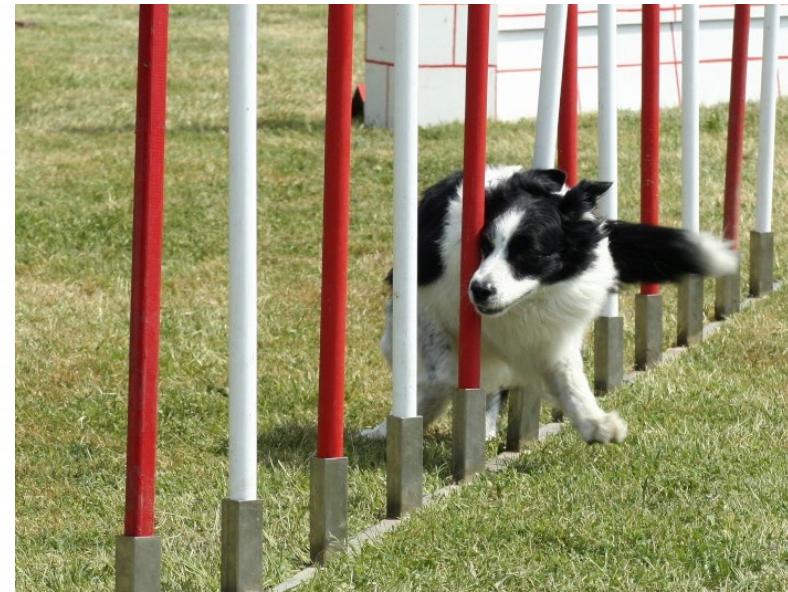
- Don't try to accomplish too much
- Complex Journey Orchestrations take time!

LESSONS LEARNT

WHY WERE WE SUCCESSFUL?



WORK TOGETHER



MAKE SOMETHING OUT OF EVERY
SESSION



MINIMISE NOISE



QUESTIONS?