



CUSTOMER SUCCESS: HOW TO GET IT RIGHT.

with

Joao Fernandes

Customer Success Consultant





WHY CUSTOMER SUCCESS IS SO IMPORTANT — ESPECIALLY RIGHT NOW.

The economic forecast has changed drastically in the last few months; it looks like we are headed towards a recession. In this climate, more and more companies are shifting their focus away from customer acquisition and towards customer retention.

With customers looking for any reason to churn, customer success is going to play a bigger and bigger role in making sure you give them a reason — or several — to stick around.

Happy and loyal customers don't just appear out of nowhere. What do companies need? For customers to stay customers and for those customers to eventually buy more. That's exactly where customer success managers enter the picture.

João Fernandes

Customer Success Consultant



How do you define the role of a customer success manager in the larger CX landscape?



Alberto Di Risio

Head of Growth



*If we take a step back and think about SaaS, usually the customer journey is quite complex. Customer success managers become **trusted advisors** that guide customers and help them navigate through the different stages and the different silos in a company.*

*They do so whilst **driving value** by making sure the solutions a customer has just purchased are valuable to them and unlocking some good **return-on-investment for themselves and the company** in the process. So there's a bit of change management involved.*

*And if you manage to build this success team that is creating happy and satisfied customers, then at the end of the day, that's **the best sales and marketing engine** you can have.*





In my experience, I see this role being conceptualized so differently across companies. Given that it's a fairly recent one and the definition doesn't seem set in stone quite yet, what do you think it encompasses?

Natalia Kulczycka

Business Development Representative





*In my experience, I see customer success in smaller companies conceptualized almost as a kind of **glorified support or a catch-all department post-sales**. So I definitely agree that the definition of customer success is different depending on the scale of the company.*

*But it is **important for companies to make a distinction between success and support**. As for what that distinction is, customer support is often more reactive in nature and kicks in once a customer has reached out with a problem. It's a problem-oriented relationship.*

*Customer success, on the other hand, is a more **proactive** department and CSMs are very **strategic** in how they build those **customer relationships**.*





You mentioned that support is reactive, João. At Fullview, we're big believers in proactive support, which we discussed in a [recent webinar](#). So, can proactive customer support and proactive customer success coexist? And how should the ball be passed between them?

Alberto Di Risio

Head of Growth



I think there're different layers for communicating known issues and it's probably different in each company.

Yes, that makes sense.



Ultimately, whomever knows the information first should be able to get that across to the customer as quickly as possible, regardless of the channel. The most important thing is that no department is working in silos. However, having the CSM focus on how to use a product, or features and fixes, ultimately distracts them from their main goals, which are to build relationships with the executive team of your customers, driving adoption, upselling, etc.



I've noticed that often, the two roles or teams (customer support and customer success) overlap when a company is small and then get more distinct and independent of each other as it scales. Is that your experience too?

Natalia Kulczycka

Business Development Representative



Yes, at scale the roles are different. In larger companies, CSMs start shifting the conversation to value. They focus on what a customer's goals are and what KPIs they use to measure success. And they also start highlighting financial value.

João Fernandes

Customer Success Consultant



What are some common mistakes you see when companies begin to scale and differentiate these roles?



Alberto Di Risio

Head of Growth



*Something I see as a huge **pitfall** is when companies start **siloing data** as things start to split into distinct functions.*

*You might go from a startup that had this catch-all customer success/customer support person with a **360° view of the customer** — to a company that loses that when they start to get more and more differentiated.*

*At that stage, it's important to invest in **tools that can connect** all these different data points and systems to surface **key insights**. For example, you might want to **think about connecting your CRM system with your ticketing system**. And then connecting both to your customer success tool.*



That's 100% in line with what we're building at Fullview. It doesn't only work as a standalone tool — we've built some really key integrations to help companies achieve this 360° view.



Alberto Di Risio

Head of Growth

There's also a relational aspect to this. As a CSM, you want to be planting seeds across the organization — past your primary contact person — to make sure it isn't easy for the company to churn and, if it does, that you have many relationships you can leverage as a way back in.

João Fernandes

Customer Success Consultant



And I imagine the relationships you have with these different personas need to be specifically tailored to each one.



Yes, absolutely, the message needs to fit the persona and be tailored for them. So, for example, when you're talking to the higher-ups, like VPs or CEOs, you need to be talking about the high-level overview or the financials. Save talk about the features for your daily point-of-contact.

What are the core areas in which success teams can have the biggest impact?



Alberto Di Risio

Head of Growth



*As you grow, you'll want to **split functions**. For example, onboarding and renewals.*

*You might want to have some sort of **professional services team with extensive experience doing that initial setup** during the honeymoon onboarding process to immediately deliver on value after the long-drawn-out sales process. And with renewals, maybe something like an **account executive** there to help commercially close the contract with the best value for the company.*

*And then all these functions sort of become the **customer's account team** with various points of contact.*





Something I strongly believe is that it's critical for CS leaders to track the right metrics and be able to communicate their value to other stakeholders. What's your take on which metrics they should be tracking?

Natalia Kulczycka

Business Development Representative



Totally agree. Teams need to articulate their value clearly. The wrong metrics to use for CSMs are the number of tickets they're resolving. I think churn is helpful to look at — although it is hard to pin to one particular team or individual. Still, it's useful for the success team to take ownership here so they get a seat at the table. NRR is another useful metric.

João Fernandes

Customer Success Consultant



Great points. Any other metrics you see as relevant?



Definitely keep track of cross-sells and upsells. Another metric that I really like for this is time-to-value. CSMs need to make it a goal to show value as soon as possible. They need to constantly ask and answer: how long until a customer sees value and how long until they get a return on investment.

Should CSMs be earning variable compensation via compensation for upselling?

Natalia Kulczycka

Business Development Representative



Definitely! You're making sure the CSM is aligned with what the company is trying to do. Depending on your setup and business goals, you may want to look at different levels of compensation for different things, but compensation of some sort should be part of the picture.

João Fernandes

Customer Success Consultant



How often should CSMs check in with customers?



Alberto Di Risio

Head of Growth



It depends on how you have your organization set up. When you look at the theory, you have a pyramid model where you have low touch, medium touch and high touch customers, so perhaps you want to go by the level of MRR or ARR. You learn as you go, but having playbooks is immensely helpful.

João Fernandes

Customer Success Consultant



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