The GitLab Handbook

GitLab   TeamOps   Handbook   Job Families   Reports

Customer Success

The Customer Success department is part of the GitLab Sales function who partners with our customers to deliver value and positive business outcomes throughout their journey with GitLab

The Customer Success department is part of the GitLab Sales function who partners with our customers to deliver value and positive business outcomes throughout their journey with GitLab.

The team can be reached in Slack channel (internal only).

Mission Statement

To deliver value to all customers by engaging in a consistent, repeatable, and scalable way across defined segments so that customers see the value in their investment with GitLab, and we retain and drive growth within our enterprise customers.

- The mission of the Customer Success Department is to provide these customers with experience in order to:
    - Accelerate initial customer value
    - Maximize long-term, sustainable customer value
    - Improve overall customer satisfaction & referenceability
    - Maximize the total value of the customer to GitLab

Vision Page

The "Customer Success Vision Page" provides the long-term view of company wide success to which the customer success will be building in partnership with the value centers of the GitLab organization (i.e., Marketing, Sales, Product/Engineering, Support, Finance, and IT).

Department Initiatives

Our large and strategic customers are in need of an ongoing partnership that combines expert guidance with flexibility and adaptability to support their adoption and continuous improvement initiatives.

These customers expect that partner to provide a streamlined, consistent and fully coordinated experience that encompasses the full span of their needs as well as the fully lifecycle of the relationship. Need to focus on 4 main areas in order to grow in our existing accounts as well as land large and strategic:

1. Awareness
2. Adoption
3. Usage
4. Performance

Initiative: Awareness

Opportunity to improve the overall awareness of GitLab in order to promote and evangelize our brand and solution in a meaningful way to provide big business impact to our customers so that they believe in our vision and strategy.

Initiative: Adoption

Ensuring paying customers are successful in their onboarding in order to gain adoption and get the most out of our platform and remain happy, paying GitLab team-members and brand advocates.

Initiative: Usage

Collecting and making use of customer data and insights is key to customer success. It's important to do more with data and when necessary share back with customers, which in turn helps and encourages our customers to improve and drive adoption.

Initiative: Performance

Utilizing built-in monitoring instrumentation and [a scalable HA architecture](), the Customer Success team helps ensure implementations of GitLab are operating at peak performance as organization scale and adopt more features.

Customer Success Playbooks

See the [Playbooks Page]()

Customer Terrain Mapping Engagements

Terrain Mapping discovery engagements provide customers with the benefit of GitLab's experience with DevOps methodologies, Git, GitLab, CI, CD, and monitoring by brainstorming a high level, first draft discovery of the elements of a success plan to address various challenges. They are also mapped to professional services that can help with some of the elements identified in the engagement.

See the [Terrain Mapping Engagements Page](#)

Customer Success Groups

Customer Success Teams

- [Customer Success Manager handbook](#)
- [Customer Success Engineer handbook](#)
- [Customer Success Architect handbook](#)

Customer Success Decision Tree

[CSMAE Decision Tree](#) – internal only

Renewals Managers

- [Renewals Managers handbook](#)

Digital Strategy

- [Digital Strategy handbook](#)

Demo Systems

- [Demo Systems documentation](#)

Account Team

The account team is comprised of the Strategic Account Executive/Account Executive, Solutions Architect (Enterprise), and Customer Success Manager.

[More information about the account team](#)

Overlap Between Solution Architects and Customer Success Managers or Architects

SA owns 1) pre-sales technical evaluation and relationships prior to the initial sale and 2) tier upgrades and new business units (i.e., connected new) within an existing customer. CSM owns 1) post-sales customer relationship and 2) license upgrades within an existing customer.

[More information on the transition and ownership between Pre-Sales and Post-Sales](#)

Other Resources

Education and Enablement

As a Customer Sucess team member, it is important to be continuously learning more about our product and related industry topics. The [education and enablement handbook page](#) provides a dashboard of aggregated resources that we encourage you to use to get up to speed.

Customer Workshops

CSM-Created, Enablement Focus:

- [All CSM-created workshops](#)

CSE-Created, Enablement Focus:

- [GitLab User Webinars and Labs](#)

Using Salesforce within Customer Success

Visit [this page](#) for more info on using Salesforce within Customer Success.

Using Gainsight with Customer Success

Visit [this page](#) for more information on using Gainsight within Customer Success.

Dogfooding

Outside of Engineering the Customer Success team has the largest concentration of tooling development capability. The team has unique needs that can't always be solved by GitLab's single [DevOps platform](#). However, it is important to [dogfood](#) and avoid [dogfooding anti-patterns](#). As a result the [Product organization heavily weights internal customers](#) when

considering prioritization. If you are considering building tooling in support of Customer Success priorities outside of GitLab, please follow the [dogfooding process](#).

Customer Success AWS Test Account

In an effort to keep AWS spend down, initiatives are being taken to automatically clean up our AWS account. This account is primarily used as a proof of concept for IaC and creating demos for GitLab customers. An automated cleanup script is currently being tested that will tag, shutdown and delete old resources as they are no longer needed. The automation will:

- Turn off and Tag Un-named resources. When resources are created a "Name" tag should be created with a value that's meaningful and indicates who deployed the resource. Example: {initials}-GitLabRunner
- New Resources will be automatically tagged with a Discovered and Expiration tag.
- The Expiration tag is 14 days after the discovery. The script will only a tag an instance once. If you need additional time, please change the date to a reasonable date for cleanup (Add a month or two for prospective customers).
- If a resource needs to be permanent please set termination protection on the instance. This should also include tagging the instance with an explanation on why it's permanent and what its for.
- On expiration the resource will be shut off and left for 7 days.
- In 7 days if the instance is still off a snapshot will be taken and it will be terminated.
- If the instance is still on but the expiration has not been changed it will be terminated.

Customer Success Tools and Scripts

By customer or internal request, we sometimes develop tools to automate certain GitLab tasks using the API. The resulting tools and scripts are publicly available for everyone to use and contribute to in the [GitLab CS Tools group](#). **Note : Those tools are not supported by GitLab Support.**

Communities of Practice

[Community of Practice](#) are cross-functional groups of SME's (or aspiring to be!) within the CS organization dedicated to a topic within GitLab or the broader DevOps space. The goal is to build assets, best practices, demonstrations, and share experiences we learn from prospects and customers. In turn, CoP will build broader technical depth within our CS organization to better advise our customers and influence our product roadmap.

Anyone can establish a [Community of Practice](#), and anyone can be a part of one. To be [efficient](#) and [transparent](#), we have set guidelines on how Communities of Practice should

operate.

Frequently Asked Questions

Customer Success team members maintain a [FAQ](#) to keep questions customers ask documented in a place where everyone can view and contribute to.

Customer Success resource links outside handbook

- [Customer Reference Sheet](#)
- [Sales Collateral](#)
- [GitLab University](#)
- [Our Support Handbook](#)
- [Customer Collaboration Project template](#)
- [GitLab Demo Portal](#)
- [Workflow SA Demo Scenarios](#) (Internal Only)
- [SA-Created - Hands-On Workshops](#)

Other Sales Topics

- [Sales Handbook](#)
- [Sales Operations](#)
- [Sales Skills Best Practices](#)
- [Sales Discovery Questions](#)
- [EE Product Qualification Questions](#)
- [GitLab Positioning](#)
- [FAQ from prospects](#)
- [Client Use Cases](#)
- [Proof of Value Guidelines](#)
- [Account Planning Template for Large/Strategic Accounts](#))
- [Sales Demo](#)
- [Sales Development Group Handbook](#)
- [With Whom to Talk to Ask Questions or Give Feedback on a GitLab feature](#)
- [CEO Preferences when speaking with prospects and customers](#)

Customer Success Meetings

Customer Success has a few standing meetings:

- CS Team Monthly All-Hands - Monthly on the second Wednesday

- CS Skills Exchange - once or twice Monthly

The different groups within CS also have standing meetings, including meetings for the Customer Success teams and Renewal Managers, regional groups, and social calls.

Account Team

The account team works together to drive value, success, and growth for a customer

APJ Customer Success

The APJ Customer Success department is part of the GitLab Sales function under the WW Customer Success organisation who partners with our large, mid-market and strategic customers to deliver value throughout their GitLab adoption in the code development lifecycle.

The team can be reached in WW Customer Success Slack channel (internal only). Further to that, the APJ Customer Success team also communicates via our Slack channel (internal & private only) amongst themselves.

Mission Statement

To deliver value to all customers by engaging in a consistent, repeatable, scalable way across defined segments so that customers see the value in their investment with GitLab, and we retain and drive growth within our enterprise customers.

Commercial Sales - Customer Success

The Commercial Sales segment consists of two sales teams, Small Business (SMB) and Mid-Market (MM)

Customer Health Scoring

Customer Account Scoring overview and methodology framework to improve our understanding of the customer's journey and their ROI attainment.

Customer Success Management Handbook

The Customer Success Management team at GitLab is a part of the Customer Success department, acting as trusted advisors to our customers and helping them realize value faster.

Customer Success Playbooks

View the Customer Success homepage for additional Customer Success handbook content.

Customer Success playbooks assist in selling, driving adoption, and ultimately delivering more value to customers via GitLab's DevOps platform. The below playbooks will include original content as well as links to other parts of the handbook.

Structure of Playbooks

Procedure: Each Playbook contains the outline of steps to position, apply discovery questions, lead value discussions, and drive adoption (CSM only). The will be driven and tracked [via Gainsight](#).

Customer Success Reporting and Dashboarding framework

This page describes the underlying philosophy and framework for how to consider and build toward the long term goal of effective and efficient reporting and dashboarding

Customer Success Vision

Create a company-wide customer success approach, providing an engagement framework for the Customer Success organization

Customer Success' Frequently Asked Questions

Customer Success FAQ Charter

Team members in Customer Success face questions from customers every day about a variety of topics related to GitLab. In an effort to maintain GitLab's values of [collaboration](#), [results](#), [efficiency](#), [Diversity, Inclusion & Belonging](#), [iteration](#), and [transparency](#), we are collectively updating this FAQ as a Customer Success team with questions received by customers, in the hope to help other GitLab team members (both iin and out of Customer Success), our customers, and our wider GitLab community.

Customer Terrain Mapping Engagements

Customer Terrain Mapping Engagements provide customers with the benefit of GitLab's experience with DevOps methodologies, Git, GitLab, CI, CD and monitoring by brainstorming a high level, first draft discovery of their specific challenges that need to be addressed for success in a scoped area of DevOps (a Terrain). The need for this generally arises when the customer is getting ready to utilize technologies and/or methodologies they are less familiar with.

Customer Workshops

Please reference the [Workshops section on the Customer Success page](#) for up-to-date information on and links to CS Workshops.

Demo Systems

The GitLab Demo Systems provide infrastructure for the GitLab Customer Success, Marketing, Sales, and Training teams to demonstrate GitLab features, value propositions, and workflows in a variety of asynchronous and live capacities.

Educational Services

GitLab Product Training for Customer Success

As a Solutions Architect, Customer Success Manager, or Professional Services Engineer, it is important to be continuously learning more about our product and related industry topics. This handbook page provides an dashboard of aggregated resources that we encourage you to use to get up to speed.

GitLab Quick Start for New GitLab.com Customers

Tasks to complete when your subscription starts

Initiatives

Partners

Product Usage Reporting Vision

The page outlines the current and planned utilization of operational data at GitLab, including Product, Sales, Customer Success, and Marketing.

Professional Services Team Handbook

The Professional Services team at GitLab is a part of the Customer Success department helping customers achieve value faster.

Public Sector

Renewals Managers

Resources to get started with GitLab

A 5-day plan to get started with GitLab

Success Services

The Success Services department is part of the Customer Success function who partners with our customers to deliver value and positive business outcomes throughout their journey with GitLab.

The team can be reached in Slack channel (internal only).

For content for positioning the value of the service, how to price/quote the service and how to handle objections, please visit the internal handbook page here.

Success Services

Overview

Our Success Services drive adoption and value realization of GitLab products whilst providing customers with Best Practices and a higher tier of White Glove support. We achieve this by bundling a named Support Engineer, a Customer Success Architect (CSA) and Education services into a single orderable SKU as an annual renewable service.

Transitioning Accounts from Pre-Sales to Post-Sales

How to effectively transition a customer from the pre-sales engagement to post-sales to ensure the customer is successful.

Using Salesforce within Customer Success

- Using Salesforce within Customer Success *(Current)*
- Account Onboarding
- Customer Success Manager Summary
- Account Triage
- Account Engagement

On an account view in Salesforce, there is a Customer Success section, with the following fields:

- Health Score - A field to record the overall customer health CSM Sentiment - A field to list the CSM's sense of the customer's health
- GitLab Customer Success Project - Where you enter the URL of the project created using the template described above
- Customer Slack Channel - A field to record Slack channel(s) used for internal and external customer collaboration. If a channel is internal, make sure it follows the naming convention `#a_<customer-name>-internal` per Communication Chat
- Solutions Architect - The Solutions Architect aligned with the account
- Customer Success Manager - The Customer Success Manager aligned with the account

Salesforce Objects

Salesforce operates using a series of objects. Standard objects are objects that are included with Salesforce. Common business objects like Account, Contact, Lead, and Opportunity are all standard objects.

Last modified September 23, 2024: Fix broken links (d748cf8c)

 View page source - Edit this page - please contribute. (cc) BY-SA