Success From Scratch: Building Blocks Workbook

Thank you!

Welcome to the Success From Scratch Building Blocks workbook. Congrats on taking the first step towards building your Customer Success Program 🎉

Phases and Outputs

There are three phases to the building blocks.

1. **Essentials**: this phase includes necessary steps to understand your product and customers well enough to get started with Customer Success. The two outputs of this section are the Building Bedrock and Standard Success Outcomes.
    a. **Building Bedrock**: build an internal onboarding guide for people to get up to speed on your product. Capture resources, start conversations, and create a rock solid resource for all future hires.
    b. **Standard Success Outcomes:** make sure everyone at your company is aligned on the value propositions of what you're offering. If you can't articulate these, you will struggle to scale your Customer Success program.
2. **Efficiency**: this phase is guides you through the process of building a framework for your customer success program. The two key outputs are the the Onboarding Outline and set of activities automated.
    a. **Onboarding Outline**: in order to drive your Success Outcomes, you will need to break down the path to success for your customers. Building a framework for your customers to succeed will ensure smooth renewals and lead to expansions.
    b. **Automating Activities**: any manual work you can take off your team's hands will allow you to scale efficiently. This section offers a repeatable

framework for identifying automation activities and taking them to completion.

3. Enterprise: this phase is focused on managing a large volume of customers at scale. The two outputs here are a Customer Health Scoring framework and Growth Plan for your team.
    a. **Customer Health**: Customer Health Scores are the North Star for any good Customer Success team. You can use these to shift from reactive to proactive and create meaningful metrics around adoption and renewal rates.
    b. **Growth**: it's important to strategize growth rather than just grow for the sake of growth. This section forces you to think critically about your program and what is needed from a skillset perspective to help it thrive.

Sample timeline

The Phases and Sections of this workbook are meant to be done roughly in order, but most will overlap in one way or another. For example, your Building Bedrock for internal knowledge will significantly overlap with your Onboarding Outline which is focused on customer facing collateral.

- **Week 1-2**: Start Essentials to understand product and customers
- **Week 3-4**: Begin documenting essential tasks and key outcomes, start discussions with internal team on common use cases
- **Week 5-6**: Continue documentation, start identifying themes and key results of use cases and successes
- **Week 7-8**: Begin customer outreach for feedback on success outcomes, enable internal team to focus on these outcomes
- **Week 9-10**: Start Efficiency phase, list all tasks for success outcomes, capture feedback from sales, marketing, product teams
- **Week 11-12**: Align tasks with existing documentation, identify gaps in customer facing collateral, create installation and configuration docs
- **Week 13-14**: Write how-to guides and deployment guides, record training videos

- **Week 15-16**: Start using customer journey with high touch customers, review journey quarterly for updates
- **Week 17-18**: Start Customer Health Hero phase, list all product metrics relevant to a customer health score
- **Week 19-20**: Get buy-in from product team on capturing these product metrics, create a first scoring methodology
- **Week 21-22**: Begin manual testing of scoring methodology on customers
- **Week 23+**: Iterate!

Essentials: Building Bedrock

> 💡 **Essentials**: this phase includes necessary steps to understand your product and customers well enough to get started with Customer Success. The two outputs of this section are the Building Bedrock and Standard Success Outcomes.
>
> **Building Bedrock**: build an internal onboarding guide for people to get up to speed on your product. Capture resources, start conversations, and create a rock solid resource for all future hires.

👀 Watch all public facing demos of your product or sit in on a few live demos

- **Phase**: Essentials
- **Section**: Building Bedrock
- **Type**: Research

Background

It is important to understand your product messaging in order to support your customers. One factor in this is public facing demo content.

Questions

1. What are the challenges that we solve?
2. What are the top pages shown in our product?
3. What are the key features that are shown off?
4. Where could someone new to the product easily get confused?

Key Outcomes

1. Complete understanding of product messaging
2. Ideas for how this aligns with the customer journey and expectations

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✏️ Learn the core use cases of your product and how customers are accomplishing them

- **Phase**: Essentials
- **Section**: Building Bedrock
- **Type**: Research

Background

There could be a difference in how your marketing displays your product and the true value your customers get from it. This is common since often times we think about features and customers think about use cases. This exercise will help you think like a customer.

Discovery Questions

1. How is our largest customer using our product?
2. How is our most engaged customer using our product?
3. What are the business outcomes our customers are getting from our product?

Key Outcomes

1. Set of 3-5 use cases for your product that you see customers accomplishing
2. Sets of steps for each use case to accomplish them

📕 Read through all of the customer facing documentation of your product and try everything along the way

- **Phase**: Essentials
- **Section**: Building Bedrock
- **Type**: Research

Background

This exercise helps you put yourself in your customer’s shoes. It’s critical for learning what it’s like to actually be a customer and use your product.

Discovery Questions

1. What did I have trouble doing?
2. What documentation are we missing completely?

Key Outcomes

1. List of action items to improve your documentation
2. Complete understanding of where your customer pain points will land

🖱️ Click every button, knob, etc in your product’s UI and see what happens

- **Phase**: Essentials
- **Section**: Building Bedrock
- **Type**: Research

Background

This exercise helps you put yourself in your customer's shoes (again). It will help you identify edge cases in your product and how they could be leveraged.

Discovery Questions

1. What did I have trouble doing?
2. What is high value that would be easy to miss?

Key Outcomes

1. List of challenges your customers will face and how to make them easier
2. Ideas for new documentation and playbooks for customers to follow

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❓ If you don't understand something, ask your product team to help you understand

- **Phase**: Essentials
- **Section**: Building Bedrock
- **Type**: Research

Background

This is more of a reminder than exercise. As you are working through the Path to Product Proficiency, you will not be an expert on everything. Use your team to help you along the way.

Discovery Questions

1. What is confusing you?
2. Who do you need help from?

Key Outcomes

1. Better relationships with your internal teams

2. Better understanding of who has all the tribal knowledge you need to surface to your team and customers

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📖 Read all the internal documentation your product team has built related to your product

- **Phase**: Essentials
- **Section**: Building Bedrock
- **Type**: Research

Background

It's likely that not ALL of your product documentation is customer facing. You need to review your internal wiki as well to surface hidden gems.

Discovery Questions

1. What could be made public?
2. What could be made into templates for future conversations with customers?

Key Outcomes

1. Ideas for new documentation and templates

🕸️ Try to understand what your infrastructure looks like behind the scenes

- **Phase**: Essentials
- **Section**: Building Bedrock
- **Type**: Research

Background

While this may be out of scope for less technical folks, it's helpful to understand what your product architecture looks like. This could include a variety of things depending on the complexity of your product.

Discovery Questions

1. How is your product hosted?
2. How do deployments work?
3. What are the key things customers can configure?
4. What breaks the most?

Key Outcomes

1. Better documentation on your product architecture

🧵 Read your API documentation

- **Phase**: Essentials
- **Section**: Building Bedrock
- **Type**: Research

Background

While it won't be every customer, your most advanced customers will likely use your API to do things you don't support natively. It's helpful to better understand how it works.

Discovery Questions

1. How does authentication work for your API?
2. Are any customers automating things with your API today?
3. Are there any open feature requests that could be accomplished with the API?
4. If capable, can you create a set of sample scripts for your customers to use?

Key Outcomes

1. Understanding of key use cases for your API
2. Understanding of the limitations on your product today
3. Sample scripts (if that fits in your skill set)

📝 Fully document this process to make it repeatable for future hires

- **Phase**: Essentials
- **Section**: Building Bedrock
- **Type**: Documentation

Background

This is another reminder more than exercise. At this point, you likely have loads of notes on your Path to Product Proficiency, but you need to turn that into reusable content.

Discovery Questions

1. What are the public documentation items you need to write?
2. What are the internal documentation items you need to write?

Key Outcomes

1. New documentation

🤝 Use your Path to Product Expert Documentation to create an onboarding plan for new hires

- **Phase**: Essentials
- **Section**: Building Bedrock

- **Type**: Action

Background

Now that you've researched and documented everything under the sun, it's time to turn that into an internal onboarding plan. This should encompass all things related to your product that any new hire should know.

Discovery Questions

1. What internal documentation is important to review?
2. What external documentation is important to review?

Key Outcomes

1. Onboarding plan

Essentials: Standard Success Outcomes

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> **Standard Success Outcomes:** make sure everyone at your company is aligned on the value propositions of what you're offering. If you can't articulate these, you will struggle to scale your Customer Success program.

🗨️ Discuss common use cases with internal team

- **Phase**: Essentials
- **Section**: Standard Success Outcomes
- **Type**: Research

Background

At this point, you have likely identified the most common use cases based on your research in Path to Product Proficiency. Now, it’s time to fully flush them out internally to align on what you want to focus your efforts on.

Discovery Questions

1. What are the top use cases?
2. What are the steps to success in those use cases?
3. What are the key outcomes customers get from these use cases?
4. How can these be tied to ROI?
5. How can you ease the process of accomplishing these use cases?

Key Outcomes

1. Complete understanding of your top use cases and how to accomplish them
2. Documentation on best practices for accomplishing the use cases
3. Ideas for your sales team to hone in on these during the sales cycle
4. Ideas for your product team to ease the customer journey to these use cases

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🏁 Discuss current customer successes with the team

- **Phase**: Essentials
- **Section**: Standard Success Outcomes
- **Type**: Research

Background

Building off the use cases with the team. Identify customers that have found success with these use cases. You will want to think through this to prepare to validate those use cases with the customer as you build out your playbooks for success.

Discovery Questions

1. Who are my most engaged customers?
2. Who is likely getting the highest ROI from our product?
3. Who is likely willing to chat more about these use cases?

Key Outcomes

1. Short list of customers to review and validate your success outcomes with

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📈 Identify themes for those use cases and successes

- **Phase**: Essentials
- **Section**: Standard Success Outcomes
- **Type**: Research

Background

As you hone in on use cases, you want to see if there are any themes to them.

Discovery Questions

1. Persona based?
2. Product tier based?
3. Industry based?

Key Outcomes

1. Themes for your success outcomes

✅ Identify key results of those use cases and successes

- **Phase**: Essentials

- **Section**: Standard Success Outcomes
- **Type**: Research

Background

As you think through use cases for you product, you need to identify key results that allow you to track success on the use case. This will be useful for reviewing with customers and for health scoring in the future.

Discovery Questions

1. Is there a key product milestone for each use case?
2. Is there a way to track a milestone back to some ROI metric?

Key Outcomes

1. Ideas for milestones to track in the product and to discuss with customers

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👀 Create documentation and a slide that easily illustrates the success outcomes

- **Phase**: Essentials
- **Section**: Standard Success Outcomes
- **Type**: Documentation

Background

As you work towards validating your success outcomes, you need to put it into a deliverable format to use as a conversation starter. You should also loosely document the steps to the outcome with the key results.

Discovery Questions

1. What are the themes?
2. What are the success outcomes?

3. What are the steps to accomplish each?

Key Outcomes

1. Deliverable slide to talk internally and with customers
2. Steps to success for each success outcome

💬 Get feedback on what was missed from your top 5-10 customers based on engagement

- **Phase**: Essentials
- **Section**: Standard Success Outcomes
- **Type**: Action

Background

Use your list of customers identified earlier to have an open discuss about success outcomes. Make sure to stay open to ideas vs selling them on what you came up with.

Discovery Questions

1. What is the value you are getting from the product?
2. How does that translate to ROI for you?
3. How would you say these success outcomes align with your usage?
4. What are we missing?

Key Outcomes

1. Validated success outcomes
2. Potentially new success outcome ideas

👥 Enable your internal team to hone in on these during the sales process and customer implementation

- **Phase**: Essentials
- **Section**: Standard Success Outcomes
- **Type**: Action

Background

At this point, you have documented almost everything you need to hone in on these success outcomes. Now it's time to make them actionable.

Discovery Questions

1. What does the sales team need to use these during pre sales?
2. What do customers need to make these outcomes easier to achieve?

Key Outcomes

1. Internal collateral for the sales process
2. Customer facing content that guides customers to each key success outcome

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Efficiency: Onboarding Outline

💡 **Efficiency**: this phase is guides you through the process of building a framework for your customer success program. The two key outputs are the the Onboarding Outline and set of activities automated.
Onboarding Outline: in order to drive your Success Outcomes, you will need to break down the path to success for your customers. Building a framework for your customers to succeed will ensure smooth renewals and lead to expansions.

🖍️ List all tasks you'd need to do in your product to accomplish each success outcome identified

- **Phase**: Efficiency
- **Section**: Onboarding Outline
- **Type**: Documentation

Background

In order to guide your customers down the path to success, you need to identify each task they need to take to get there. It's not possible to be too granular on this, and the more detailed the better.

Questions

1. What are the outcomes you want to create a task list for?
2. How do outcomes potentially overlap?
3. What are the phases of getting there?
4. Example - Planning, Configuration, and Usage could be three starter phases.

Key Outcomes

1. Complete task list of things customers need to do to accomplish success outcomes in your product

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➕ Add all auxiliary tasks the customer will likely need to do outside of your product

- **Phase**: Efficiency
- **Section**: Onboarding Outline
- **Type**: Documentation

Background

In addition to your product, it's possible people need to take action outside of your product to accomplish success outcomes. Align these with your in product task list to think through the complete experience.

Questions

1. What do they need to discuss internally to plan properly?
2. What teams do they need to involve to succeed?
3. Does you product need access to any other tools?

Key Outcomes

1. Complete list of tasks a customer would take to accomplish all of your success outcomes
2. Ideas for where customers will face challenges outside of your tool that you can help them plan for

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💬 Capture feedback from sales, marketing, product, and any other team relevant at your company

- **Phase**: Efficiency
- **Section**: Onboarding Outline
- **Type**: Research

Background

Once your complete task list is finished, it is important to get feedback from all the other teams that could use it. This will ensure you catch anything that was missed. It will also give people the opportunity to think through this process themselves which provides perspective.

Questions

1. Who in sales knows the customer onboarding process the best?

2. Who in product would have insights into the key functionality and how it works?
3. Who in marketing would know the initial steps well?

Key Outcomes

1. Validated task list for success outcomes
2. Buy in across the board on what it takes for a customer to get ROI from your product

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📐 Align all tasks with existing documentation, videos, and guides to identify gaps in your customer facing collateral

- **Phase**: Efficiency
- **Section**: Onboarding Outline
- **Type**: Action

Background

Now that you know what a customer needs to do, you need to figure out how to make this as easy for them as possible.

Questions

1. Where are there gaps in documentation?
2. Where could the product make steps easier for customers?
3. Where could automation help get information in from of the customer at the right time?
4. What makes sense for video content?

Key Outcomes

1. Alignment on tasks to documentation
2. Gaps in documentation outlined with plans to address

🧑‍💻 Installation and configuration docs

- **Phase**: Efficiency
- **Section**: Onboarding Outline
- **Type**: Documentation

Background

This task is a placeholder of you to track documentation that needs to be created.

Questions

1. What installation docs need to be created?
2. What configuration docs need to be created?

Key Outcomes

1. Installation and configuration documentation done

📝 Write how to guides

- **Phase**: Efficiency
- **Section**: Onboarding Outline
- **Type**: Documentation

Background

While documentation is good, playbooks and how to guides are better. Take your success outcome task lists and turn them into guides for your customers to follow.

Questions

1. How does it make sense to segment the guides?
2. In what order does it make sense for customers to follow them?

Key Outcomes

1. Customer facing collateral on how to accomplish your success outcomes

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🚀 Write deployment guides

- **Phase**: Efficiency
- **Section**: Onboarding Outline
- **Type**: Documentation

Background

Once you have a guide for each success outcome, you can turn that into a comprehensive deployment guide to use with customers. This can be done through automation and/or live on calls with customers.

Questions

1. What types of customers do you have, and does this differ depending on the customer type?
2. How do you want customers to consume this content?
3. In most cases, making this public in the documentation is the best option

Key Outcomes

1. Deployment plan for the Customer Success team to follow with customers
2. Ideas for automation on when it makes sense to engage with customers

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📷 Record training videos of all key product features

- **Phase**: Efficiency
- **Section**: Onboarding Outline
- **Type**: Action

Background

It is important to understand how your product messaging in order to support your customers. One factor in this is public facing demo content.

Questions

1. What are the challenges that we solve?
2. What are the top pages shown in our product?
3. What are the key features that are shown off?
4. Where could someone new to the product easily get confused?

📍 Start using your customer journey with high touch customers to help you iterate on it moving forward

- **Phase**: Efficiency
- **Section**: Onboarding Outline
- **Type**: Action

Background

Before you move to automated delivery of your deployment plan, it oftentimes makes sense to validate it works with your high touch customers. If it works for them, it should work for your lower engagement segments as well.

Questions

1. How long do your deployments take?
2. If they are extended time (>3 months), it likely makes sense to work on the automated efforts in tandem rather than waiting for results

3. What steps did you not think of that you ended up adding?

Key Outcomes

1. Validated onboarding outline

🎯 Review the journey quarterly to see if any new product releases have changed the journey

- **Phase**: Efficiency
- **Section**: Onboarding Outline
- **Type**: Action

Background

As your product evolves, your onboarding outline needs to evolve as well. This is an evergreen task that will allow you to continuously improve.

Questions

1. What new features have you added over the past 3 months?
2. What has changed in the ways existing features work?
3. Are these changes impactful enough to update the deployment plan?

Key Outcomes

1. Continuous improvement

Efficiency: Customer Health Hero

💡 **Efficiency**: this phase is guides you through the process of building a framework for your customer success program. The two key outputs are the the Onboarding Outline and set of activities automated.
Automating Activities: any manual work you can take off your team's hands will allow you to scale efficiently. This section offers a repeatable framework for identifying automation activities and taking them to completion.

🏁 List all product metrics potentially relevant to a customer health score

- **Phase**: Efficiency
- **Section**: Customer Health Hero
- **Type**: Documentation

Background

At this point, you and your team will know your product better than anyone else in the company. With that being said, it's time to think through what a healthy customer looks like.

Questions

1. What does good user activity look like?
2. What features or pages should customers be using frequently?
3. How are they utilized against their license?
4. Where is the largest ROI coming from?

Key Outcomes

1. List of potential health scoring metrics

🤝 Get buy-in from product team on capturing these product metrics

- **Phase**: Efficiency
- **Section**: Customer Health Hero
- **Type**: Action

Background

While it's great to have ideas for a customer health score, you will most likely need buy in from your product team to do this.

Questions

1. What data is collected today?
2. Where does this data live?
3. How long of a timeline would it be to get all of the metrics needed?
4. How will you report on the customer health score with the data where it is today?
5. Can this data be populated in the CRM?

Key Outcomes

1. Product and Customer Success alignment on collecting customer data points

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🙌 Create a first scoring methodology and start testing manually on customers

- **Phase**: Efficiency
- **Section**: Customer Health Hero
- **Type**: Documentation

Background

While you are waiting for the product team to implement your agreed upon data collection, you can start using your health score manually. You can collaborate with high touch customers to do this since they will likely be interested as well.

Questions

1. What are the most important aspects of your score?
2. Where do you want the Red, Yellow, and Green cutoffs to be?
3. How do your most engaged customers stack up?
4. How do your least engaged customers tack up?

Key Outcomes

1. Initial validation on your health scores

👩‍💻 Implement full scoring methodology and test the scores against the account team sentiments across the board

- **Phase**: Efficiency
- **Section**: Customer Health Hero
- **Type**: Action

Background

Once you have your automated health scoring in place, it’s time to scale out the validation beyond your initial set of customers. Add an option for the account team to set a Red, Yellow, or Green sentiment per account and compare that to your automated health scoring.

Questions

1. Where do you see the biggest gaps?
2. What individual health metrics could be skewing the results?

3. What changes do you need to make to get better alignment?
4. Does it make sense to include the sentiment as part of the score?

Key Outcomes

1. Ideas for improved customer health score

👣 Start tracking health scores vs renewal rates

- **Phase**: Efficiency
- **Section**: Customer Health Hero
- **Type**: Action

Background

In order to get to a more predictable churn forecast, you need to start tracking health score at the renewal by result (won or lost). This will take at least 2 quarters, but you should start seeing decent results within a couple of months.

Questions

1. How can you set a trigger when the renewal deal is closed to check the health score?
2. How can you report on both customer count and ARR?

Key Outcomes

1. Initial steps towards health driven churn forecasting

❤️ Begin using health scores as a way to trigger proactive outreach to customers at risk

- **Phase**: Efficiency
- **Section**: Customer Health Hero

- **Type**: Action

Background

Thinking back to the automating activities section, customer health unlocks a gauntlet of automation opportunities. Use these to drive health scores up.

Questions

1. Who should be warned when a customer's health is red at different stages of the journey?
2. What can you automate related to the overall health?
3. What can you automate related to individual health scores?

Key Outcomes

1. Ideas for automation

👋 Make the product metric data accessible to other teams in your company

- **Phase**: Efficiency
- **Section**: Customer Health Hero
- **Type**: Action

Background

Spread the customer health wealth. Everyone should be enabled on how to use customer health data in their day to day.

Questions

1. How could sales use this during the sales process?
2. How could marketing use this to identify customers for case studies?
3. How could product use this to understand adoption?

Key Outcomes

1. Build stronger relationships with other team by providing them new insights
2. Everyone at your company is speaking the same language when it comes to customer health

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Enterprise: Automating Activities

> 💡 Enterprise: this phase is focused on managing a large volume of customers at scale. The two outputs here are a Customer Health Scoring framework and Growth Plan for your team.
> **Customer Health**: Customer Health Scores are the North Star for any good Customer Success team. You can use these to shift from reactive to proactive and create meaningful metrics around adoption and renewal rates.

👆 Identity simple internal process that is consistently followed

- **Phase**: Enterprise
- **Section**: Automating Activities
- **Type**: Research

Background

Ideas for automation will pop up all the time. In some cases it makes sense to automate the process, in some cases it does not. It’s highly dependent on the idea and the way your systems all work together.

Use this task as a holding place for all automation ideas. You can come back to them periodically to see if it’s possible yet.

Questions

1. What is your team doing every month that is tedious?
2. Where do you see people dropping the ball frequently?
3. What is a low value activity that is time consuming for your team?

Ideas for Automation

1. Add
2. Ideas
3. Here

🆕 Identify triggers that you are interested in taking actions on

- **Phase**: Enterprise
- **Section**: Automating Activities
- **Type**: Research

Background

Another approach to automation is to think about key triggers in the customer journey that automation could help.

Use this task as another holding place for all automation ideas. You can come back to them periodically to see if it’s possible yet.

Questions

1. What happens when a customer signs the contract?
2. What happens when a customer’s health score turns red?
3. What happens when a customer is 3 months into their license?
4. What happens when the renewal is 3 months away?
5. What happens when a customer hasn’t logged into their account for a month?

Ideas for Automation

1. Add
2. Ideas
3. Here

🔃 Identify process that you need triggers for automation on

- **Phase**: Enterprise
- **Section**: Automating Activities
- **Type**: Research

Background

Once you are ready to automate something, it's time to figure out how to trigger the action in your product or CRM.

Questions

1. How is the trigger you are looking for tracked?
2. Does this trigger need to be created?
3. Do you need help from sales operations or engineering?

Key Outcomes

1. Confirmed trigger for your automation

🧨 Build project plan for each trigger or process you'd like to automate

- **Phase**: Enterprise
- **Section**: Automating Activities

- **Type**: Documentation

Background

Depending on which teams you need help from, you will need to track steps needed to create the automation in a way that other teams can track progress with you.

Sample Steps

1. Identify the metric you will use to track success of the automation
2. In some cases, it will not be needed, but in other cases, you may be looking for a specific outcomes with the customer that you will want to track
3. Confirm data is available for the trigger of the automation
4. Identify the customers that will be in scope for this automation to ensure your filtering properly
5. Determine how that trigger can be automatically detected by your product or CRM
6. Layout the steps that need to be taken on the automation
7. Task creation
8. Email
9. Notification
10. Implement the steps required when the trigger occurs
11. Test the automation internally prior going live

🤩 Iterate on the automation as you discover ways to improve

- **Phase**: Enterprise
- **Section**: Automating Activities
- **Type**: Action

Background

No automations you put in place will live as is forever. You will want to iterate over time as your Customer Success program, documentation, and products evolve.

Questions

1. What has changed over the last 3 months that could affect your automations?
2. Have we added any new content that would be more useful for our customers receiving automated activities?

Key Outcomes

1. Ideas for updates to existing automations

Enterprise: Geared For Growth

> 💡 Enterprise: this phase is focused on managing a large volume of customers at scale. The two outputs here are a Customer Health Scoring framework and Growth Plan for your team.
> **Growth**: it's important to strategize growth rather than just grow for the sake of growth. This section forces you to think critically about your program and what is needed from a skillset perspective to help it thrive.

👊 Determine how you'd like to segment your customers between tech touch, hybrid touch, and high touch

- **Phase**: Enterprise
- **Section**: Geared for Growth
- **Type**: Action

Background

Different customer types require different Customer Success support. Tech touch will require a Customer Success Operations hire, hybrid touch will need more junior teammates, and high tough will need more senior teammates.

Questions

1. What customer segments do I need to support?
2. Tech Touch
3. Hybrid Touch
4. High Touch
5. What type of team breakout does that end up looking like?
6. Do I need technical resources or more business focused?

Key Outcomes

1. Starting plan for what scale will look like in your organization

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🤝 Estimate what ratios make sense for CSM to customer based on you customer segments

- **Phase**: Enterprise
- **Section**: Geared for Growth
- **Type**: Action

Background

Use your scaling plan to determine what your ratios will look like in different customer segments.

Questions

1. Do all of your segments have enough ARR to justify a hire today?
2. Can some teammates cover multiple segments as you scale?

3. How much revenue does it make sense for someone to support?

Key Outcomes

1. Alignment between your current situation and scale plan

🧑‍💻 Determine if you need non-technical CSMs, technical CSMs, or both for each segment

- **Phase**: Enterprise
- **Section**: Geared for Growth
- **Type**: Research

Background

This is an important differentiator to make early on. Customer Success professionals will fall into the technical or non-technical bucket. You need to know what you need for each customer segment.

Questions

1. How complicated is our product to use?
2. What domain knowledge is key for someone to have to interact with your customers?
3. What can be easily trained vs requires background skill?

Key Outcomes

1. Added context to your scale plan

📑 Build onboarding plans for your CSMs to simplify onboarding

- **Phase**: Enterprise

- **Section**: Geared for Growth
- **Type**: Documentation

Background

You should have this mostly flushed out from the Path to Product Proficiency section, but this is a good time to review this documentation since a lot has likely changed!

Questions

1. What has changed about your product that needs to be added to your Path to Product Proficiency?
2. What automations or processes are missing from the documentation?
3. What other internal onboarding steps are needed for a successful start?

Key Outcomes

1. Onboarding plan for your Customer Success hires

📅 Build 30-60-90 day plans for your CSMs to clearly set expectations

- **Phase**: Enterprise
- **Section**: Geared for Growth
- **Type**: Documentation

Background

In addition to the onboarding plan, you need to set expectations early for what their start will look like.

Questions

1. How long will it take them to get up to speed on the product?

2. How quickly do you need them taking over accounts?
3. What is flexible and what isn't?

Key Outcomes

1. Complete start plan for your new hires

📃 Build your job description and comp plan to begin the recruiting process

- **Phase**: Enterprise
- **Section**: Geared for Growth
- **Type**: Documentation

Background

Once you are ready to scale, you will need your job description and comp plans to get started.

Questions

1. What is the market value for this role? Glassdoor is a decent resource here.
2. How senior will this person be?
3. What companies have similar roles I can reference while building the job description?
4. What do other job descriptions at my company lay out?

Key Outcomes

1. Ready to start recruiting when the time is right
