

# CS Ops Journey

Whether the initial focus is on driving retention, expansion, advocacy or efficiency, Customer Success Operations (CS Ops) experts agree their overall mission typically involves driving operational excellence and efficiency of the Customer Success (CS) team to ensure positive customer outcomes. How do you accomplish that? By managing systems & tools to support the customer experience, gathering & analyzing data for business insights & thoughtful decision-making, and creating documented programs and processes to operationalize and scale the business. Best-in-class CS Ops serve as thought partners for strategic initiatives and can execute to get it done. Let's explore the typical journey to best-in-class CS Ops.

## 1 Dive In



### Identify an initial area to operationalize

First experiences range from being chartered with helping CS be more efficient to making a decision about a CS platform to managing an existing CS platform. Regardless, there's always an immediate 'fire' that needs to be put out.



*While you're putting out your first CS ops fire, create a 90 day CS Ops roadmap.*



### Talk to the people who know the customer

Internal customer experience conversations reveal common themes related to that first challenge and beyond... like "our customers aren't realizing the full value of our products/features" or "helping our CS team be more efficient will make our customers more successful".



### Learn how to navigate internal operations

What you need to solve the highest priority problem you were hired to solve may involve several people in the organization. No matter how difficult, remember that conquering that first challenge will help you build credibility so you can more easily get access to data and support moving forward.



### Pick your starting point

With input from knowledgeable team members and some data to back up your decision on how to proceed, you're ready to execute and conquer that first business challenge.

## 2 Gather Input & Go Further



### Prioritize business challenges

With the first fire out, you've likely already moved on to the second one. But now is the time to concurrently begin thinking about how to prioritize requests and get alignment on a more comprehensive mission and execution strategy.

*Find a mentor, join the CS Ops community conversations to learn from your peers, & begin creating a 6 month plan.*

### Leverage standard solutions to solve common business challenges

Do your first couple of fires already have solutions? Build a cadence of capturing benchmarks for each challenge, running proven 'plays', documenting processes, and reporting on results.

#### UNEXPECTED, PREVENTABLE CHURN

- Create or refine the forecasting & renewals process
- Create or use a Customer Health Score to get ahead of potential risks
- Build a scalable at-risk/escalation workflow
- Track & measure retention improvements

#### POOR PRODUCT ADOPTION

- Design a new customer welcome process
- Promote key features/workflows
- Monitor product adoption or consumption
- Build campaigns for companies & contacts with low usage or engagement
- Monitor usage data and present analysis to showcase improvements

#### DISCONNECTED CUSTOMER EXPERIENCE WITH YOUR COMPANY

- Institute a new deal review to feed into a more effective onboarding strategy
- Refine the customer journey focusing on better hand-offs
- Collaborate with teams who touch the customer - implementation team on time-to-value (TTV), customer support team on ticket time to close, etc.
- Build & automate a comprehensive enablement & communication strategy
- Create a closed loop feedback process (NPS and CSAT)
- Report on improvements in key metrics like TTV, NPS, & CSAT

#### LACK OF VISIBILITY TO THE HEALTH OF THE BUSINESS

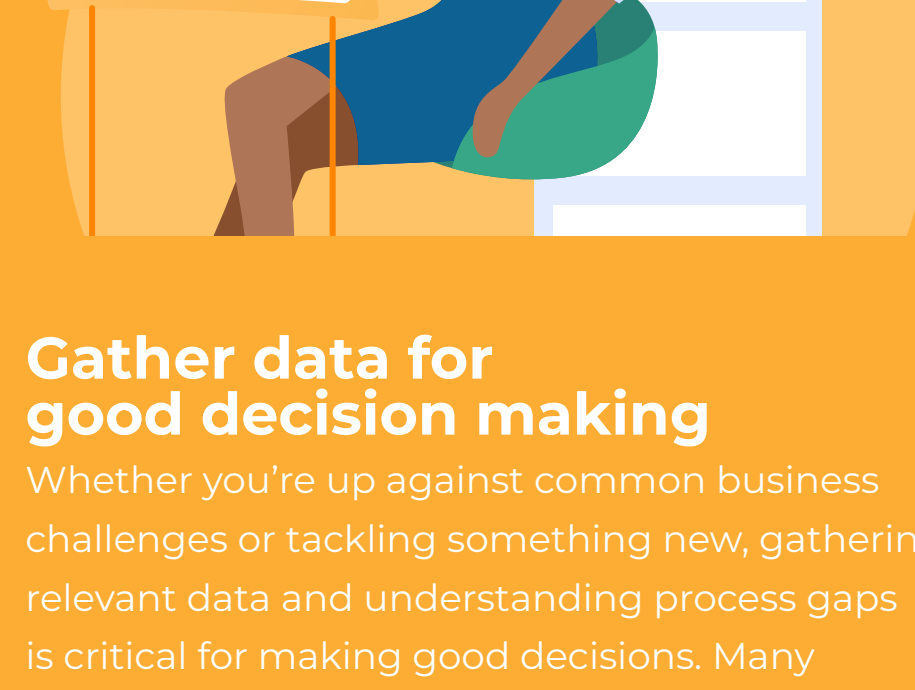
- Create a reliable, automated Customer Health Score (including direct feedback)
- Establish a strategic customer business review process
- Introduce & execute on an executive sponsor program to align stakeholders
- Trend & report on the health of the business over time (by meaningful cohorts)

#### INABILITY TO SCALE WITH THE ALLOCATED RESOURCE

- Automate manual customer outreaches
- Identify risks using data
- Build email templates & standard decks to minimize repetitive efforts by CS
- Create one-to-many customer events (i.e. customer office hours, webinars, round tables, email campaigns, in-app engagements)
- Confirm customer segments and ratios for the CS team
- Measure time saved and monitor/update CS team ratios



*Data can come from CS interviews, sales ops renewal & expansion forecasting, revenue ops metrics on churn, marketing event & email campaign data, services implementation data, and customer support ticket & escalation details.*



### Gather data for good decision making

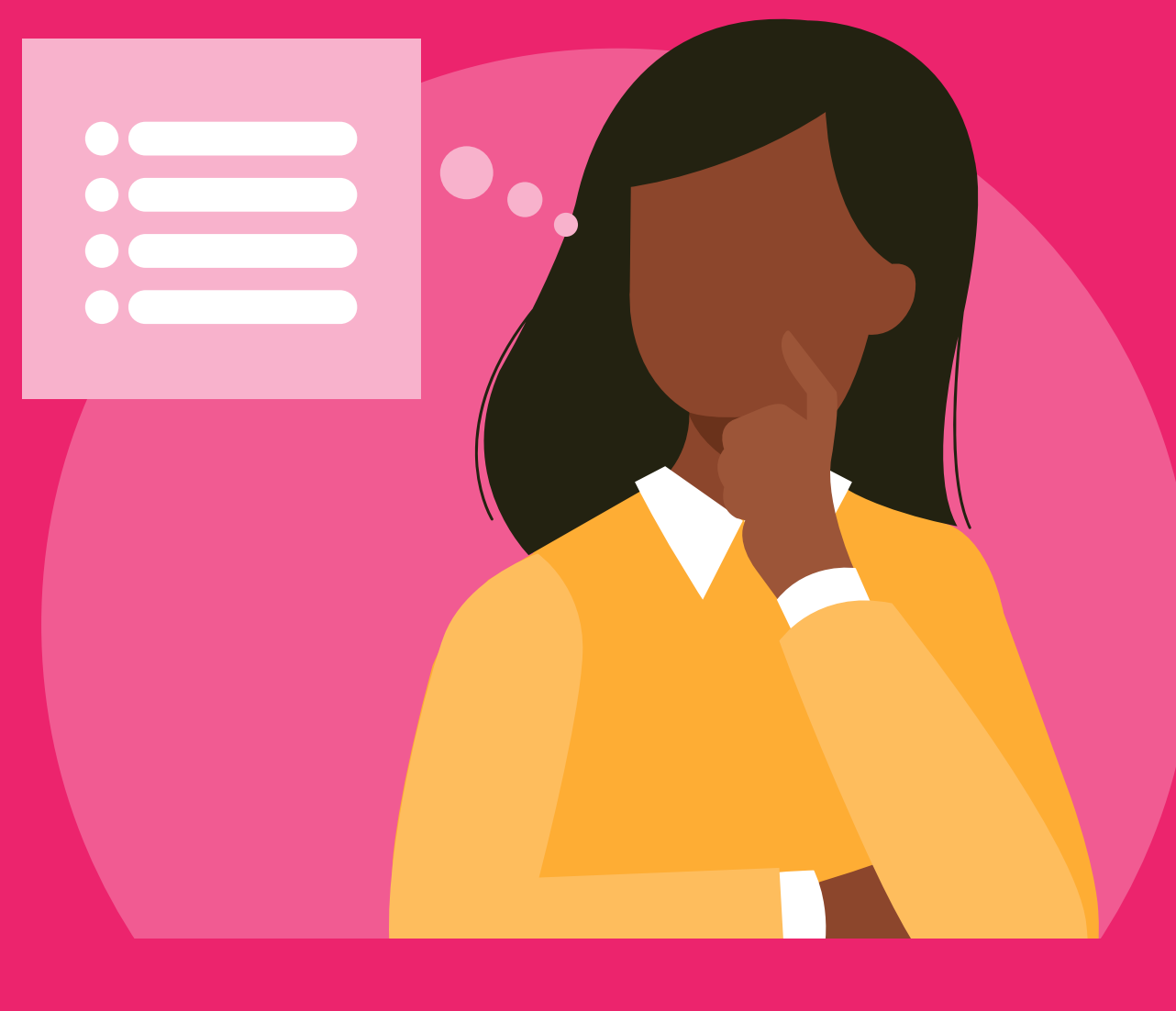
Whether you're up against common business challenges or tackling something new, gathering relevant data and understanding process gaps is critical for making good decisions. Many times data isn't clean but don't let a desire for perfect data get in the way of data that's good enough. Rely on your mentors and community for practical advice.



### Combine objective & subjective inputs and get buy-in on the definition of success

You'll be fighting fires for a while, but combining feedback from team members with patterns in your data will help you validate the critical customer success program or process issues that can accelerate results and deliver better outcomes. Track to agreed upon success metrics & tip the scales to be more proactive.

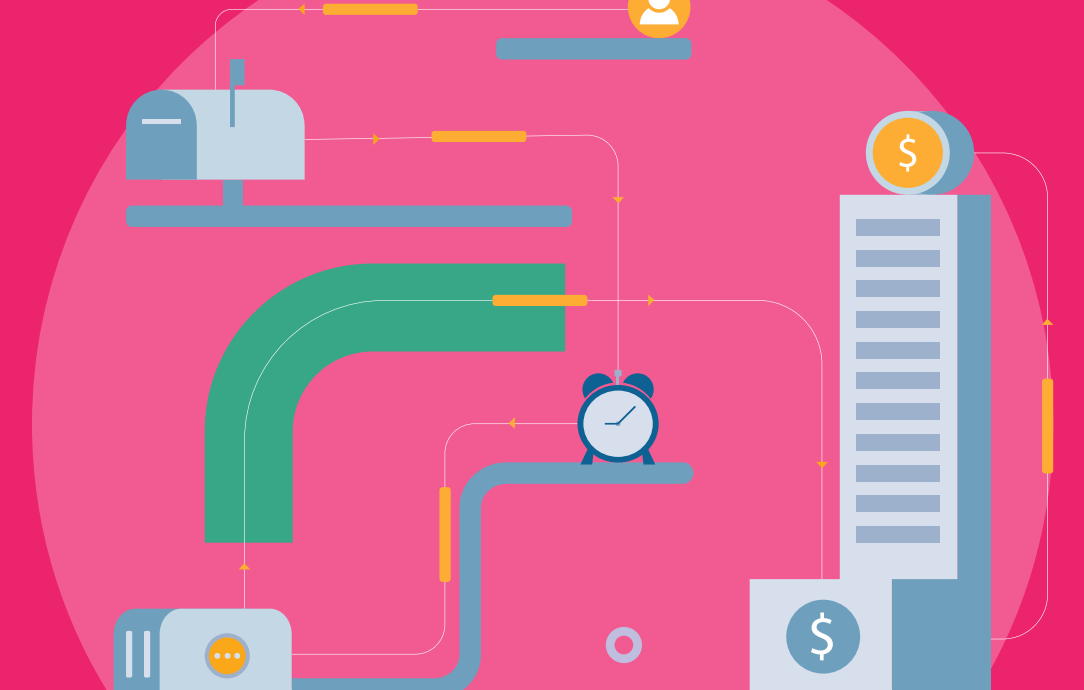
## 3 Take A More Programmatic Approach To Operations



*In some cases, using an existing sales strategy for segmenting customers into SMB, mid-market, and enterprise (for example) will work for CS. Remember that there's value in keeping segmentation simple to start.*

### Create an agile approach to managing projects and programs

Prioritizing a backlog of tasks and creating manageable sprints will give you flexibility to deliver and adjust priorities as needed. Change management and a regular cadence for releasing updates to the business is imperative. Tracking adoption will ensure you're able to seamlessly integrate changes. Plan to revisit the solutions you've previously launched for adjustments that may be needed.



*A consistent approach for rolling out business processes will help with change management.*

### Apply workflows for different segments of the business to improve results

Increasing automation and productivity across all CS teams will be ongoing. Be sure to account for higher touch and lower touch business model needs. If your customers aren't segmented into cohorts, consider the value in creating different delivery methods to scale CS.



### Enlist your partners outside CS

Using a central project planning tool for seamless cross-functional collaboration will allow for even greater success. Work with revenue operations on better renewal forecasting or with product on in-app messaging to drive adoption or with customer experience on closed loop feedback processes.



### Build advocacy

By diagnosing issues, celebrating successes that enhance the efficiency of CS and help drive outcomes, you're building internal and external champions. Maximize momentum through operational rigor and storytelling. Let your advocates advocate.

## 4 Execute Strategically As A Thought Leader



*To achieve greatness, bring a servant leadership and 'beginners mind' perspective to CS Ops.*

### Meet regularly with leadership

Look ahead 12 months, determine new goals, and highlight data to support recommendations for continuous improvement. Present findings to drive strategic initiatives that evolve as your business evolves.



### Measure impact and scale

Your positive results become a regular part of CXX level conversations. Keep line of sight on what's most important to the customer and the business; keep focus on achieving desired outcomes with an amazing customer experience.



### Expand the scope of your responsibilities

Think more broadly about the entire customer journey to get a more holistic view of the customer experience. Increase CS Ops scope to own more components of business success which may include account allocation & capability planning or a more detailed enablement plan for CS.



### Share your expertise with the broader CS Ops community

Best-in-class CS Ops serve as thought leaders for strategic initiatives and can execute to get it done. Share your experiences in the CS Ops community and through mentoring to help build the CS Ops brand.

*"I work in CS Ops because I believe that 'where the rubber meets the road' is so important that I want to be the one designing the tires. CS Ops crafts how CSMs spend their days, removes their frustrations and roadblocks, gives them tools to do more, and finds opportunities to do better. What an honor to have that mission! I get to spend all day, every day improving the lives of my teammates. Then they, in turn, improve the lives of people who have invested their trust and budget in us, so I feel my impact spreading outward. I live in CS Ops as a software administrator, and have grown into a trusted consultant for 'How should the CS team change, so we can achieve X, Y, and Z at the same time?' I've never felt more valuable, accomplished, or innovative, and I've relished managing my team to each grow along the same path".*

Seth Wylie, Gainsight  
Head of CS Operations

**For more information**  
For more CS ops education and information, please visit Pulse CS Ops central [www.gainsight.com/pulsecsops](http://www.gainsight.com/pulsecsops).

**Questions?**  
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