1 The Power of Customer Success

The backbone of any client relationship is what happens after the first deal. Customer Success (CS) is a critical component of a successful customer engagement process. Growing revenue requires your organization to be cross-functionally aligned on buyer value and solution differentiation before and after the sale. Capturing that value after the initial deal is essential for driving recurring revenue and expansion opportunities within accounts. Fostering alignment between the traditional sales organization and CS teams is one area today's top leaders focus on to gain a competitive advantage.

Customer Success Trends

98% of B2B SaaS companies are *maintaining or increasing* their investment in Customer Success

The number of B2B SaaS orgs with dedicated Customer Success Teams *more than doubled* between 2022 and 2023

Source: Gainsight CS Index of North America 2023

Customer Success, once the "break-fix" reactive department which leaders viewed as a cost center, now anchors revenue health. The shift is old news, but these statistics show that selling organizations are still catching up to newer subscription and consumption models where customers hold all the cards. Today's most successful companies got ahead of the curve by investing in team proficiency at leveraging post-sale customer relationships.

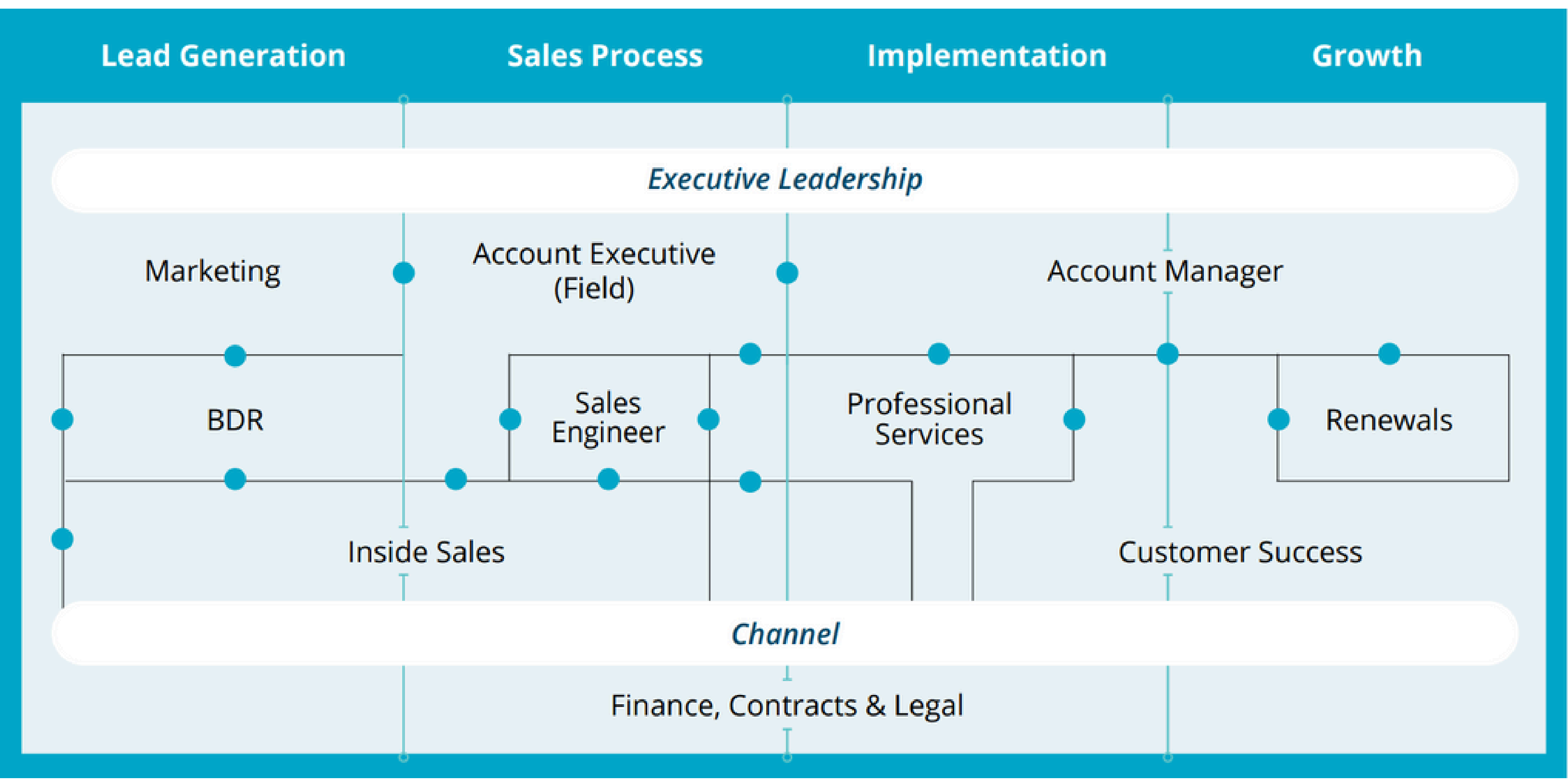
Command the narrative: give your team an edge with an aligned approach to post-sale customer engagement.

2 The Customer Journey

The buying process has evolved into a more collective effort for buyers, and selling organizations are adapting to instill value at each stage of the customer lifecycle. Continuity in your team's ability to convey value throughout the post-sale stages of customer engagement is often the difference between renewals and a high churn rate that hinders growth. Drive outcomes by navigating key handoffs, leveraging the post-sale relationship, and culminating the success into a great value story. This is that pathway toward healthy, long-term client relationships.

Consider your organization's message and philosophy across each touchpoint in the customer engagement journey as illustrated in the below graphic.

How are handoffs between the left side (Lead Generation/Sales Process) and the right side of the graphic (Implementation/Growth) managed to ensure consistency in promised and delivered value across the customer journey?



3 Generating Alignment with Sales

Value messaging, qualification and negotiation are three core activities that drive success in sales. We don't always think of Customer Success as engaging in these strategies, but their understanding and execution of these concepts is critical to executing a **value-based motion across the customer lifecycle**.

Here's what alignment can look like when Sales and Customer Success both execute these core activities:

	Sales	Customer Success
Value-Based Messaging	Execute profound discovery on specific pain points, business outcomes, and solution requirements.	Maintain the "why" behind features and functions throughout implementation. Gather KPIs that demonstrate the positive business outcomes.
Consistent Qualification	Ensure managers and sellers are aligned on qualification criteria, how it informs/enacts other selling actions.	Apply qualification process to cross-sell and upsell opportunities. Monitor changes in the client org, identify new champions or stakeholders, and cultivate advocates.
Universal Negotiation	Shape solution requirements by negotiating early and often. Leverage anchors to influence decisions.	Deliver on agreements and give/gets in ways that preserve value and hold client accountable to their end of the deal. Leverage feature/function updates to speak to client's current state and priorities.

Alignment is the forcing function for all critical areas of your go-to-market teams. To drive a consistent sales motion that supports renewal and expansion revenue, **leaders must create agreement** on the fundamental components of the value-based sales conversation and the strategies that support a unified selling effort. Arm your CS team with tools that maintain a value-based messaging, negotiation, and renewal qualification approach consistent with your customer-facing teams that landed the initial deal.

4 Reducing Churn and Driving NRR

Identifying Root Causes of Churn

Sales organizations need to dig deep on churn says Allison Pickens, former COO of Gainsight and co-author of "The Customer Success Economy." Her conversation with hosts John McMahon and John Kaplan on the Revenue Builders Podcast examines the root causes of churn, factors leaders should consider, and why Net Revenue Retention (NRR) doesn't really tell the whole story. Listen to Allison and John in this excerpt on problems NRR might be masking.

A New Approach to Renewals

Shifting the conversation beyond "What we said we'd do and how that's working out," creates countless opportunities upstream. Engaging your client in ways that say, "We're going to be with you," creates an environment where the vendor becomes a trusted partner.

"What is the focus of your selling organization? Are you focused on selling solutions and products, or are you focused on your buyers' success?"

Tim Caito
Senior Partner
Force Management

Your **Quarterly Business Reviews** (QBRs) should be leveraged to ensure you're capturing and conveying value with the post-implementation client team. Your CS team must be able to maintain a finger on the pulse as changes occur within the client organization and new stakeholders join the renewal conversation.

Help your CS team elevate QBR sessions into **business-level conversations** that connect KPIs to the larger problems your solution is addressing. Train your team to use discovery questions that:

- Reveal how your client is progressing toward the desired outcomes
- Identify new client priorities and stakeholders
- Gather information necessary for qualifying the renewal and/or expansion

Role-plays are excellent for improving your team's ability to ask the right questions during these sessions.

Effective CS discovery uncovers new stakeholders, additional champions, untapped differentiation, and additional opportunities.

Work with managers to build CS proficiency around leveraging discovery questions at QBR meetings to identify expansion opportunities and aid renewals.

CS discovery questions might include:

- "What are your business priorities in the next six months?"
- "Walk me through what's happening in your organization."
- "What challenges are you seeing in our partnership?"
- "Who else is involved in your company that I should be supporting?"

Carrying the same tenets of deep discovery and qualification into the post-sale stages of customer engagement builds advocacy, opens the door for account expansion, and elevates the relationship to that of a trusted business partner.

2x Increase in Conversion Rates

Sysdig included its CS team in its Force Management engagement to address challenges that SaaS companies with highly technical products often experience. The customized engagement included Command of the Message® , the MEDDICC qualification method, and an eLearning component that reinforces and drives consistency. Results for Sysdig included a **reduction in churn** and a significant **uptick in securing renewals**.

Learn more about how Sysdig doubled conversion rates, cut ramp-up times in half, and improved retention rates in this Case Study and video interview with Keegan Riley, CRO at the time of engagement.

More Customer Success Resources

ARTICLE

EBOOK

PODCAST

The Right Partner for Customer Success Growth

Force Management has worked with leading sales organizations for over 20 years, helping them to build a company-wide sales discipline that drives results. Our methodologies have resulted in bigger wins, greater quota attainment, more accurate forecasting and higher talent retention for hundreds of clients across industries including Cybersecurity, FinTech, Business Intelligence, and DevOps.

We partner with each sales organization to custom-tailor our signature methodologies to their solutions, helping them maximize their talent with a repeatable and aligned process that paves the way to growth.

START A CONVERSATION ▶

“Our net retention revenue and our gross retention revenue have skyrocketed over the last 12 months because we're better at making our customers successful at their projects because we understand their actual pain. It's not just, 'Hey, we've got this cool widget, you bought it. Good luck with that.'”

- Keegan Riley, Former CRO, Sysdig

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