



The 9 Pillars of Customer Success



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From Blocks to Pillars

It truly has been a privilege to hold a position that allows me to work with unique people who never stop teaching me new things.

As we've transitioned from an on-premise to a SaaS based organization, my thoughts on creating a customer centric organization have transitioned as well. I truly believe customer success is the most important part of a company, and the need for it intensifies as any company grows.

These pillars started as blocks. Piece by piece they've grown as a result of the knowledge of my colleagues in the office and the ones I'm privileged to call my customers. Our company's transition has not altered these pillars but simply turned them into the solid foundation that will reshape as we look to the Cloud.

A handwritten signature in dark ink, appearing to read 'JAZ' with a stylized flourish.

Jaime Zuluaga

President of Customer Success

Meet Jaime

At heart, Jaime is a software evangelizer and entrepreneur who specializes in data visualization and product management. At Roambi, he works closely with clients and partners to enhance user experience and product functionality. His passion for the customer experience led him to take over Customer Success, and rethink the strategy to be as forward-thinking as the product suite.

Jaime joined Roambi from Business Intelligence Studios, where he was co-owner and managing partner. His work in executive dashboards and scorecards is used by executives and business users in some of the most prestigious companies around the world. His earlier experiences were shaped by being a core team member of two successful startups (acquired by Oracle and Business Objects). While at Business Objects he was named Xcelsius Fellow for his contributions in the area of data visualization and software innovation.

Pillar 1

Live and in Person



A nice surprise from a customer to one of our Support Engineers for a job well done.

Live and in Person

Roambi Customer: “Jaime, it really bothers me that I seem to know every person on your support team...”

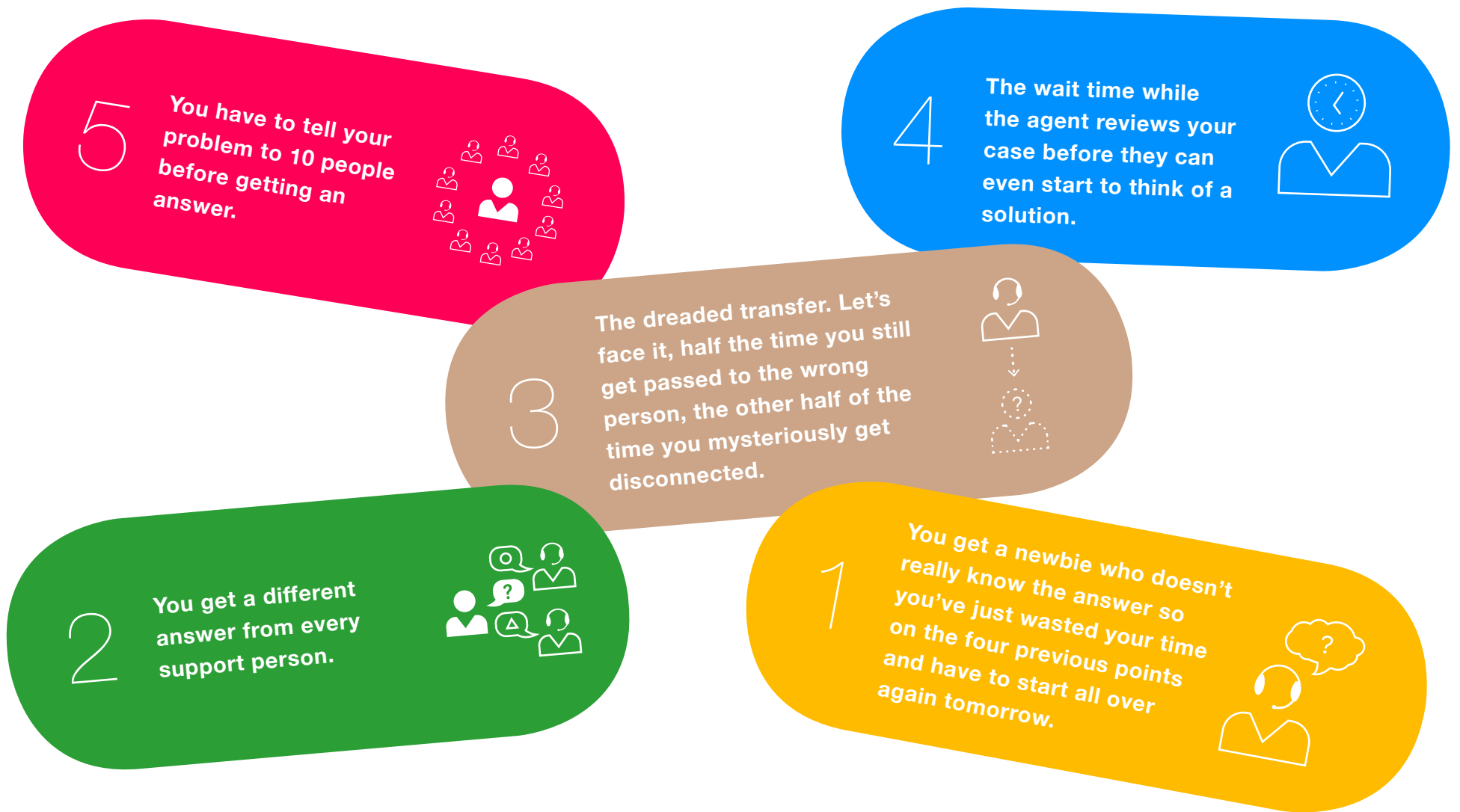
Me: “What about that bothers you? Are we not doing a good job?”

Customer: “No, your team is great. It just makes your company still feel like a small start-up... doesn’t THAT bother you?”

The answer to that question is exactly the opposite. I love it. Growth is a beautiful thing, but you can quickly lose that personal relationship you get with many early adopters and project sponsors. While it is inevitable in some cases, we are always spinning our wheels to find ways to reach out to our customers all over the world.

With any product, especially a SaaS offering, your support offering will make or break you. Often it is the only communication a customer has with your product. Our support team has grown with our customer base, but we work hard to keep constant communication with our customers which I believe has contributed more to our success than we’ll ever know.

Top Five Reasons Everyone Hates Calling Support Lines



I don't know about you but when I have to endure one of the scenarios above, I seriously start to have serious doubts about a product. No matter how great the product is, customer support is a reflection of it. Avoiding these instances is relatively easy and starts with your phone support.

Here are a few easy tips to consider to ensure customer retention:

- ⦿ Personalization: Our customers know our support engineers and vice versa. When you know who you are speaking with and have confidence in their knowledge, it is easier to pick up that phone, get your question answered and get on with your job.
- ⦿ Knowledge: The unicorn of the customer service industry, a good live support engineer. They exist but you have to find someone who has strong technical expertise and communication skills. It isn't easy to find. Knowledge is vital, but the ability to create a relationship over the phone is critical.
- ⦿ Communication: Our Customer Success team conducts a daily 30 minute call to review the status of the different accounts, exchange tips and gather information. This works GREAT. Doing this daily means every single member of our organization knows the in's and out's of the product and we have a simple, effective forum to exchange information. This allows us to respond and communicate with our clients with efficiency and consistency.
- ⦿ Speed: Put your Support team and your Development team under the same roof. I can't tell you how many times our engineers have pulled a development team member on to a customer call. Right there, a solution is found from the hand that built the product. That shared knowledge solves your current customer's question quickly but also means your Support Engineers have that answer ready in case the same issue happens again.
- ⦿ All customers are created equal: It doesn't matter if your product costs a million dollars or is a free download in the App Store. You should provide full support to anyone who has an interest. If they are a free user, you are moving them through the sales funnel and a majority of the time are the first and only human interaction they have with your product. Keep them happy, and you'll keep them loyal.

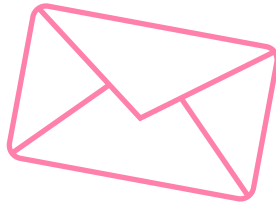
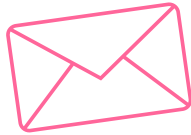
Pillar 2

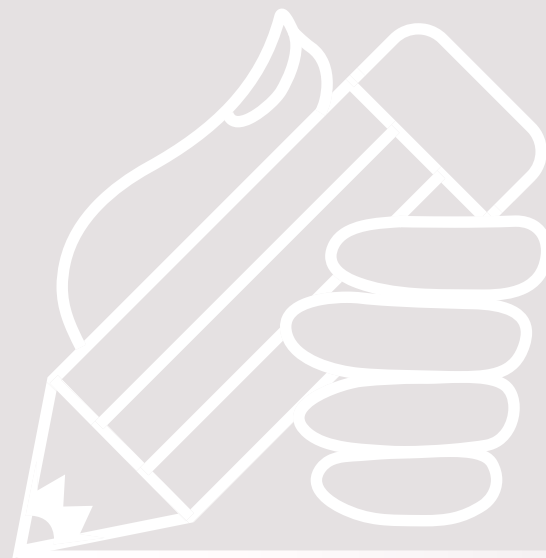
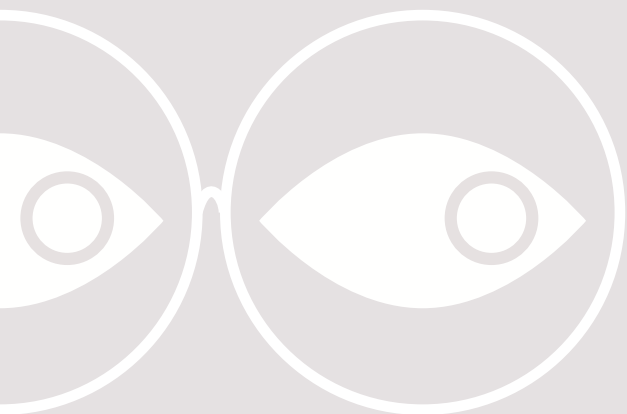
Email

More than Just an Email

In our organization, everyone is involved in customer success, including support. From the front desk to our CEO, everyone receives support emails. This not only creates accountability, it demands your product evolve to meet your customer's needs.

Sure every company has email support. It is an easy, fast and cost-effective avenue for keeping customers happy, but few actually use it correctly. We have made every attempt to facilitate the interaction with our customers. In the most simple form, all they have to do is to send us an email. That's it. Currently, we use "email to case," a feature offered by www.zendesk.com. We like this feature because it allows us to create a case out of an email and integrate it with our internal systems without having to ask our customers to fill out a form every time they need to contact us. I have seen companies that require customers to answer 10 or more questions just to submit a support case or to ask a question. In our case, we keep it simple: email us and we will take care of the rest.





Visibility

The most important aspect of email support! These emails are basically insight into your product that every department should use as a learning tool. For development, see how issues are affecting different customers and find a way to make it better. Sales, know the different problems your customers encounter and how to fix them so you can talk prospects through it on a demo. Marketing, learn how to speak to your product's strengths and weaknesses.

Productivity

I like to view each support case we receive as a possible "use case". If it comes in the form of an email, perfect, I have it in writing. As we work with customers on their problems, I ask my team to always get more information than they need. How is the customer using the product? Who in their organization is using it? How is the backend working? You don't often get a chance to speak directly with customers, so this is your chance to learn more and share those findings with your team.

Efficiency

The more you learn from each case, the easier it will be to work through the next time around. Fast customer service means happy customers and in this role you can't ask for anything more.

Don't see email support as something that exposes your flaws, make it a tool that makes your product better, and in the long run - your pipeline.

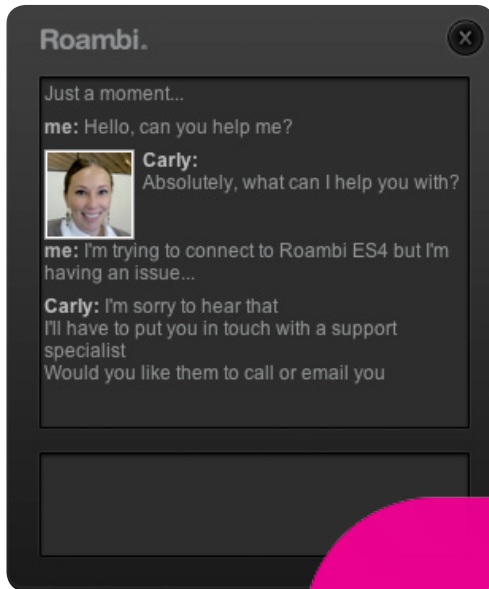
Pillar 3

Live Chat

Give Immediate Gratification

One day I logged in to live chat as an agent and started talking to a visitor. I began with my typical, “good afternoon, how can I help you?” Further into the conversation, I found out he was the CEO of a large healthcare company looking to mobilize his workforce. When I told him I was one of Roambi’s founders we exchanged numbers and jumped on a call. Minutes later, we set up a POC, and therein lies the power of a live conversation. It is simple enough so that a CEO, who doesn’t want to deal with a sales rep and only wants to ask some questions, has no problem using it. That means other people with buying power are using live chat. Your sales cycle just got a lot shorter.

Pro tip: On a personal note, I have noticed that C-level executives like to explore new ideas and projects late in the afternoon, early evening or Saturdays mornings. I have also noticed that the conversations are fluid and in most cases you will talk directly to the decision makers on the first call.



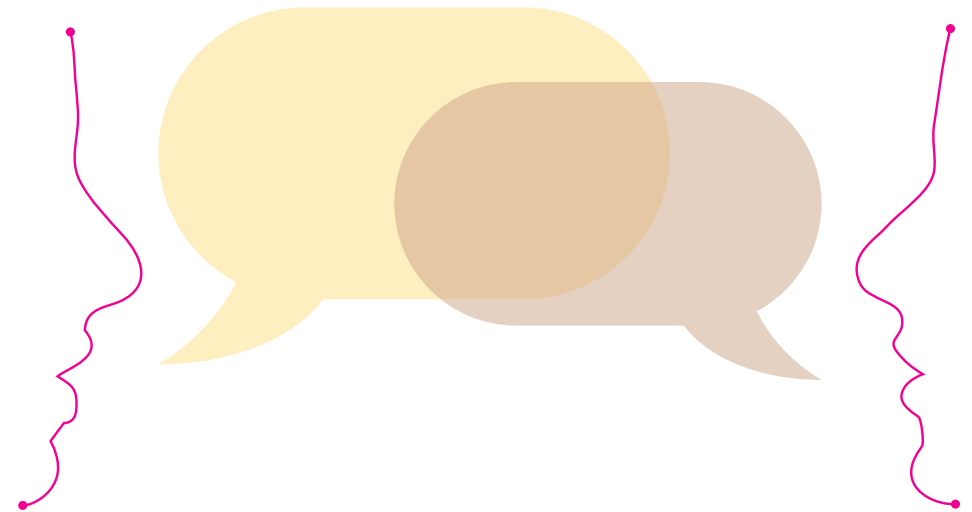
Lead Gen

When used correctly, live chat on your website is like being at a tradeshow all the time without the expense and labor - not to mention the sore feet. You have approximately five seconds to keep an interested-party intrigued. If you succeed, they stay and talk possibly even sign up for a trial. If not all they have to do is close a browser (aka walk away). It's that simple.

Customer Success

From a customer success standpoint, with live chat you are quickly addressing questions without customers/prospects having to go through a support email or phone call. They get the answer they want in seconds and move on.

When we started the pilot with our live chat initiative the first thing I did was check our website traffic and live chat conversion rates. The results were absolutely amazing as the tool is relatively affordable, easy to set up and can be manned whenever you choose. Why would anyone not use it? We ask that everyone in our organization jump on as live chat agents to interact with visitors as well as sharpen their Roambi skills.



Some might think this is a cold method for conversing with an audience. I disagree. I view live chat as a very personal tool. A visitor is basically typing in your URL and in seconds are having a real-time conversation with someone on the inside. You are making your product accessible and providing immediate gratification in a day where typing on a computer is second nature and picking up the phone and dialing is becoming a foreign notion.

Pro Tip: Our live chat tool is fully integrated with our instance of www.salesforce.com so that every single interaction with our customers and prospects is available to the sales team. By the time they call prospects, they already have solid and specific background information.

Pillar 4

Emergency Line



Anytime, Anywhere

One Saturday afternoon, we received a call on our emergency line from a customer in Australia. It was already Sunday for him and he was working on a presentation for the next morning but ran into some issues with his reports. He needed help immediately and waiting for a call back was not an option. Our team jumped on our computers to figure out who would be best suited to help and it turned out that one of our consultants was not only in Sydney, he was directly across the street from the customer. In minutes he was on-site helping the customer in person and twenty minutes later the presentation was complete. While we know it was a nice coincidence that certainly doesn't happen in most instances, the point here is that even if the consultant was remote, the client was able to reach us directly. When our users call our emergency line, we answer.


We tout that our products work anytime, anywhere because that's how our customers function. Problems will always arise outside of working hours with any business so make sure your customers feel comfortable with how you handle those situations.

Pro Tip: We have a weekly rotation with our Customer Success team to take calls from the emergency line anytime - day or night. We take this line so seriously that even our executive team can receive calls.

Yes it creates accountability, but it also shows customers that you take customer service very seriously.

A few years ago on a Sunday evening the emergency line rang with a panicked customer on the other end. They were rolling out their entire mobile initiative the next morning to over 2,000 users and something wasn't working. Immediately I called our CTO, we jumped on a plane and walked into the war room of their office at 7:00 a.m. Monday morning. Once everything was analyzed, the issue wasn't with our software, but since we were the only vendor on-site, we decided to stay a couple of days to guarantee a successful deployment. That organization continues to be one of our most successful customers today.

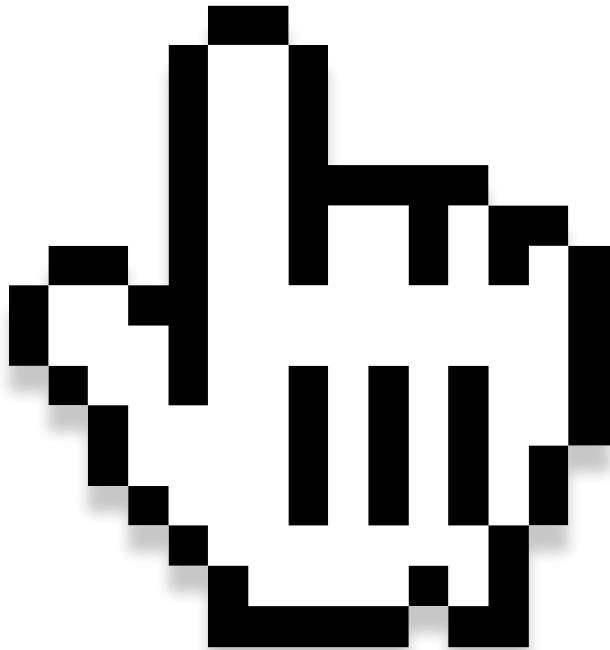
At the customer site, we weren't in meetings; we sat beside the customer in the war room and assisted in whatever way possible. There isn't a price you can place on peace of mind so go above and beyond whatever is necessary to ensure your customers feel comfortable, confident and satisfied. Things break and people will always have last minute issues these are scenarios that will always come up. How you and your team handle them will define not only that customer's success - but your business' as well.



...the issue wasn't even with our software but ...we decided to stay a couple of days to guarantee a successful deployment.

Pillar 5

Self Service



Just a Click Away

While getting one-on-one time with customers is something you should look forward to, some users just need to be able to find answers instantly at their fingertips. In fact, some users will only use self-service support. We encourage and welcome all initiatives around self-service (it makes total financial sense) and we love to complement it with a personal conversation when possible.

Customer Support Portal

When a customer visits your support page they should feel a wave of relief. Just listing a phone number and an email address does not cut it. Before they pick up the phone or type an email, this is the first line of problem solving they will encounter. Give them the ability to be successful on their own before relying on your team.

Customer Support Portal Must Haves:

Best Practices - These are probably the most downloaded documents on our support portal. No matter what kind of business you are in, you know from experience there is a certain way of doing things that provide a higher probability of your customer being successful with your product. Don't keep those in your head! Whether it is with your development team or something you learned from another customer, get it on paper so others can learn from it.

Pro Tip: We implemented a simple rule: Every support case MUST have a knowledge base article associated with it. The results are fantastic as our support engineers become knowledge agents and can help customers resolve issues on their own. We call it: Share the Knowledge.

Samples and Tutorials - In our line of work, these items are priceless. They ensure success by giving users templates you know will work right from the start. The confidence gained from that first round of success will help users feel comfortable in trying to solve issues on their own moving forward. Whether it is a step-by-step guide or a video tutorial - make it fast and simple enough so that even the most basic user is able to use it.

Forum - In my eyes, this is the most important section of a support site. Here users can post questions, achievements or something new

- ✓ Best Practices
- ✓ Samples & Tutorials
- ✓ Forums
- ✓ Expansion
- ✓ Validation
- ✓ Self Help
- ✓ Search
- ✓ Announcements

The screenshot shows the 'Roambi Support' portal. The header includes navigation links: HOME, ROAMBI FORUMS, MANAGE, and START. On the right, there are buttons for RECENT, VIEWS, and a NEW button with a plus icon. Below the header, the main content area is titled 'ES Unassigned cases (4)' with options for 'list', 'table', and 'csv'. A table displays the following data:

Score ID	Subject	Requester	Organization	Requested	Priority	Group	
1125	Re: Problems with Roambi Mapper within the	Scott Cupit	MeLLmo Inc.	04:37 pm	-	-	<input type="checkbox"/>
1124	Re: Problems with Roambi Mapper within the	Scott Cupit	MeLLmo Inc.	04:11 pm	-	-	<input type="checkbox"/>
1123	Fwd: Problems with Roambi Mapper within	Jason Flashberg	MeLLmo Inc.	03:49 pm	-	-	<input type="checkbox"/>
1109	Fwd: sharepoint issue [!]	Joshua Allen	MeLLmo Inc.	09:34 am	-	-	<input type="checkbox"/>

they learned. Creating this community fosters and builds strong relationships between your customers. Give them common ground to get to know one another, see how others are using your product or simply find the answer to an issue someone else has already encountered. There are multiple benefits:

Expansion - Customer A sees a post on how Customer B is using your product. It is something they hadn't thought about but would now like to build into their own business.

Validation - Users need to see and know there are others out there who have been

wildly successful with your product. This can basically be a forum for informal customer testimonials. Fanboys make you look good, but more importantly they are instrumental in increasing revenue.

Self Help - When customers learn from each other without your assistance, you are cutting your own labor costs. All you need is one Support Engineer watching, moderating and assisting posts.

Search - Lastly, make it easy and give them a search bar. Hopefully you've built up so much documentation that users need help sifting through it to find answers. Let searches

pick up everything on your page from best practices to forums so they have the option to chose from what support piece works best for them.

Announcements - Let's face it, your customers don't always read your email blasts or see your press releases. If you have a new product or functionality, chances are they don't know about it. On the front page of your support portal have an area where your marketing team has a voice. This will save you time in the long run by keeping your users in-the-know.

Pillar 6 Case Management

The Pulse of Your Business in the Palm of Your Hand

Some sales organizations celebrate with every sale in some way or another, and your Customer Success team should do the same with every closed ticket. It is no easy feat. However, when you stop looking at each ticket as an isolated event but rather a part of the ecosystem - you suddenly have a snapshot on the health of your business.

The best thing you can do for your customers is to use tools and processes that provide a holistic view of everything going on with their account. This is more than knowing every detail backwards and forwards. It is having the ability to analyze those details and act preemptively and proactively to diffuse an issue before it arises.

There are all kinds of tools out there that can help you manage your support. We keep it simple and use Zendesk, Salesforce and our own product, Roambi Analytics. Zendesk is fully integrated with our CRM system so everyone in the organization from account manager to CEO knows what is happening. Top it off with Roambi Analytics and we have real-time, mobile access to the overall status of each customer account and basically our entire company.

I can't stress enough the importance of pulling your data out of your



support portal and/or CRM system. How often do you really go in and analyze information from either of those platforms? Even if you do, I can guarantee your executives are not as proactive, so save yourself some time by having it all in a visualization that can be analyzed in minutes. You don't have to prepare a presentation, and they don't have to request it.

We use two Roambi views to analyze our Customer Success statistics:

- *Cardex* for agent performance, ability to compare metrics over the last 12 rolling weeks
- *Trends* for customer cases by region, customer and agent

Using these tools, we can easily identify how many cases a customer has, the status, and what agents are assigned to them.

One day, a client reached out and requested a discount in their annual maintenance and renewal fee. Why shouldn't he, it is a typical tactic in procurement. By having a centralized tool that visualized his information I was able

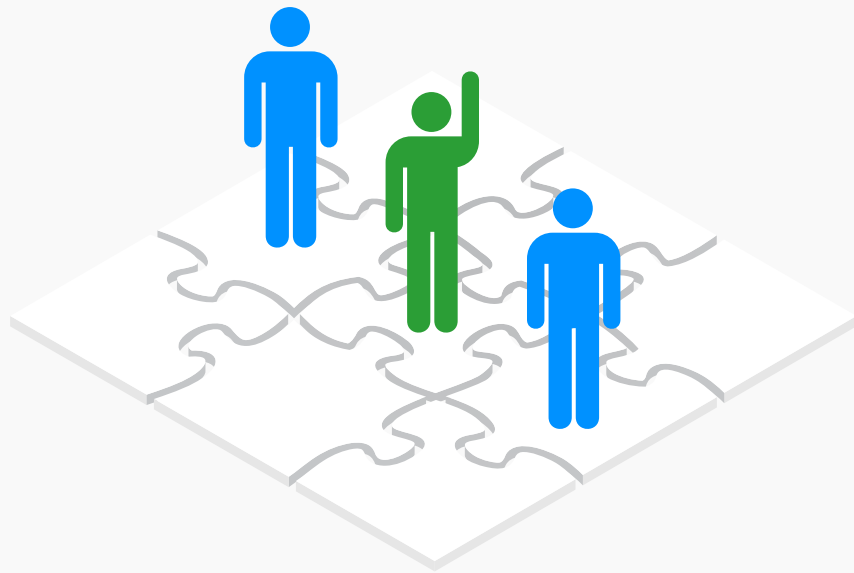
to sit down and in a matter of minutes show him all the different touch points we've had with his account. He was impressed once he saw the amount of interaction we had with his team and his renewal came in at 100 percent. We are now discussing an expansion.

The point is, prove to a customer you are all over their account night and day, and they will have a very hard time not signing that renewal contract when the time comes.



Pillar 7

Customer Advocate



Customer Advocate: “Listener in Chief”

The beauty of social platforms like LinkedIn is that you connect to others in different organizations with the hope that these connections will one day be something you can come back to and use. Think of a customer advocate as someone you use to network with and in the end get what you were looking for.

In an industry that moves as quickly as software we need to feel the presence of our clients in every single meeting. An account’s advocate, from our customer success team, keeps us focused on our priorities and commitments while also bringing customers to life for our development team by sharing progress and anecdotes.

Networking

A customer advocate is the bridge that connects the customer, development, support, sales and the account manager. They are your company’s supply chain manager who is constantly juggling every departments role in your product to ensure its delivery and your customer’s success.

Constant Contact

If you don’t hear from your customer for a while, let’s be optimistic and assume “no news is good news.” Whether this is the case or not, your customer advocate will know. They should be communicating

weekly, bi-monthly, monthly (depending on your customers status and preference). If the customer is frustrated, needs assistance or simply has stopped using your product - your advocate can immediately flag the account triggering your team to take the action necessary to get them back on track.

Your customer advocate should be connected to your customer via social platforms, as you are more likely to get an answer via Twitter than a response to an email. If they are happy, great you just got a public customer testimonial and unintentionally made your company look good by showing your customer service skills.

“Listener in Chief”

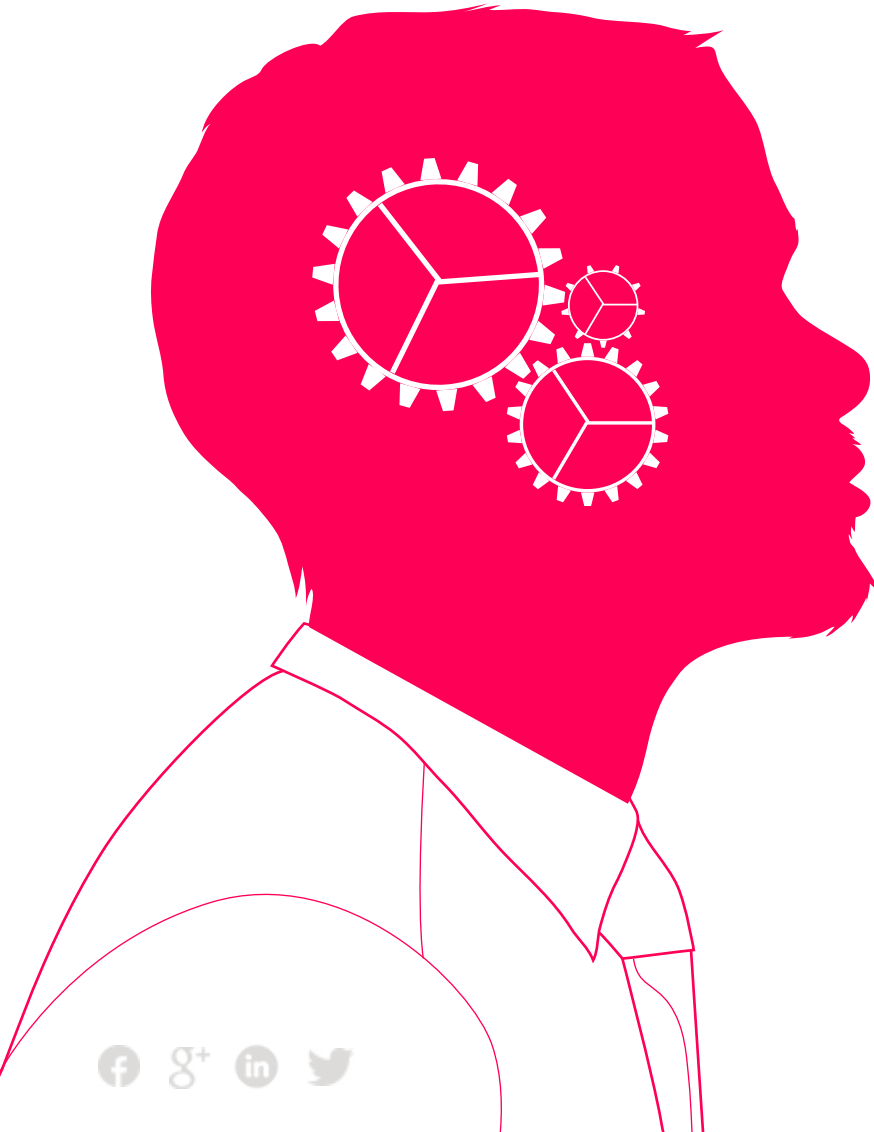
No matter if it is a problem, a suggestion or a success your customers must have a direct “in” to your organization. Whether it is good or bad, a customer needs to know their voice is being heard. Having a “listener in chief” is just another simple way to create visibility into your accounts so that the renewal projection you present to your executive team is right on par.

PS: This is also how you receive and communicate kudos to your internal teams. We all know few customers just call in to say “job well done” and every team needs to hear their daily grind is worth it.



Pillar 8

Post Sales



Software vs Consultant

Here is a question for you: Do you sell software or do you sell consultant hours?

When our executive team first got together to create the foundation of our product, all of us at some point in our careers had done some consulting so the answer was easy for us. We wanted to build a software company, not a consulting firm. While the answer was simple for us, we continue to feel the implications of that decision every single day. It has defined the way we work and more importantly how our product works.

Choosing the software path meant that our intent was to create a product that was easy to use. Because of the timing of our launch and the initial customers interest received, we decided to launch an on-premise solution first and hired consultants to go onsite with customers. Before Roambi was even a glimmer in those consultants eyes though, we set out for a different end result, one that I believe has allowed us to keep users renewing and helped us successfully transition into the world of SaaS.

Instilling Success with Knowledge Transfer

Instead of racking up consultation hours, our consultants or as I call them “relationship builders” (we’ll come back to that) are monitored based on the speed of which they help a customer. No more drawn out on-site visits and deployments, we make our customers successful as quickly as possible.

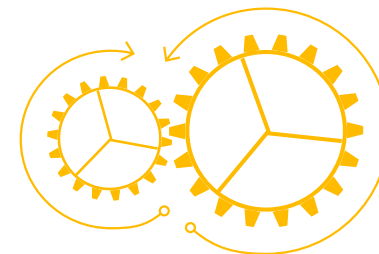
Success by any definition is based on knowledge, and that is the end-goal our consultants impart on our customers. They don’t go on-site to set up the product and leave. They go onsite to teach as well as learn. (Remember when I said we chose to build a product that was easy to use? That also meant we always put the customer first as their voices sculpted our products.) This is where a consultant changes to a relationship builder. From set-up and best practices to simply sharing personal experiences, they exist to ensure customers know how to use our product.

It doesn’t stop there. Once you get a relationship builder assigned to your account, they are a part of your team. They’ll know everything from the name of your daughter’s toy poodle and your son’s soccer team record to how you are using the product, who is using it and how you envision the product

working for you in the future. In turn, our builders share customer experiences with other customers and internally from the development team to executives.

As we are now shifting our business towards SaaS, our relationship builders have become our partners. We go to great lengths when signing partners because with this model of customer success, we consider them an extension of our internal team.

Whether it be from an employee or a partner, I loosely refer to this model as “knowledge transfer” and it has become engrained in our company culture. It doesn’t stop at the front door of our office, it is a web that continues to grow every time we sign-up a new customer. While this processes might not generate the revenue as quickly as a consultancy, it will do a lot more. It will generate customers who continue to come back.



Pillar 9

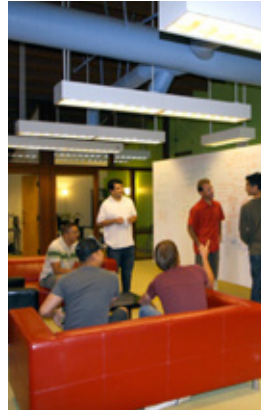
Exec Briefings

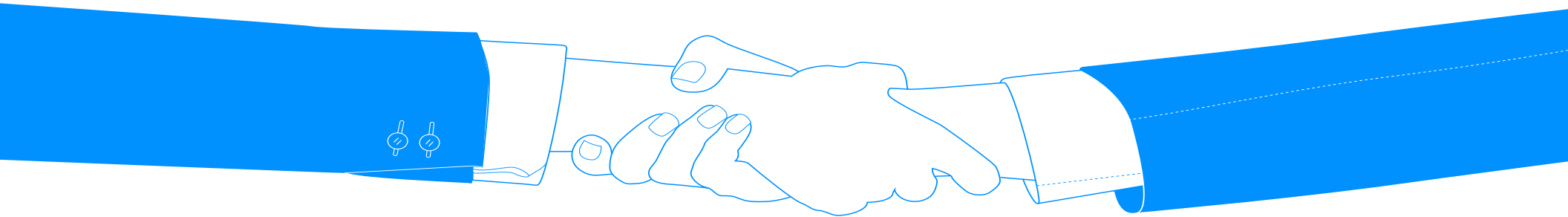
The Full Monty

The first eight pillars are very tactical, tangible initiatives. They play vital roles in the overarching theme of customer success. The last pillar to me, is by far the most pivotal piece.

Providing transparency into your organization is like giving a golden ticket to Willy Wonka's chocolate factory. By opening your doors and saying "this is us, come on in," you provide insight and trust. Customers see first-hand how you operate, put names with faces and build relationships that they will use with your product in the future.

At our headquarters it is simple, we love visitors. We welcome them anytime. Whether they are in town for a scheduled visit, just stop by or have something specific they'd like to address - we make our entire team available. There is no value you can put on this type of relationship building.





Customer Advisory Board

If you have the chance, I strongly suggest you invest your time and money hosting a Customer Advisory Board (CAB). It is single handedly the most effective way for us to truly understand our customer's needs. Some tried and tested suggestions to ensure success include:

Invite Only

We change who we invite to our CAB every year, but always make sure it is an experience where our customers feel exactly like what they are - VIPs. They are taking valuable time out of their work schedule to help us. If that's not love I'm not sure what is. Whether it is a huge enterprise or an SMB, they all have different reasons and use cases for purchasing your product and none are alike or less important than the other.

Team Collaboration

Customers define your product, and if they don't you are doing it all wrong. The best way to ensure this is to provide them face time with your development team. We present our roadmap at every CAB as it assures that customers know you take their suggestions, feedback and business very seriously. It also provides an opportunity to pull your development team away from their computers so they can see their creation being used in real-life. This type of forum makes everything very real and opens up a collaborative creative brainstorming atmosphere like you've never experienced.

Customer to Customer

There is no better way to validate your product, extract ideas for account expansion and create a community for your product than to simply get your customers in a room together. They feed off each other. We ask our customers to present how they are using our product, not only to help us in future sales, development and marketing initiatives, but to plant ideas with other customers on how they can use and be successful with a product.

Metrics

Metrics Make the Business Go Round

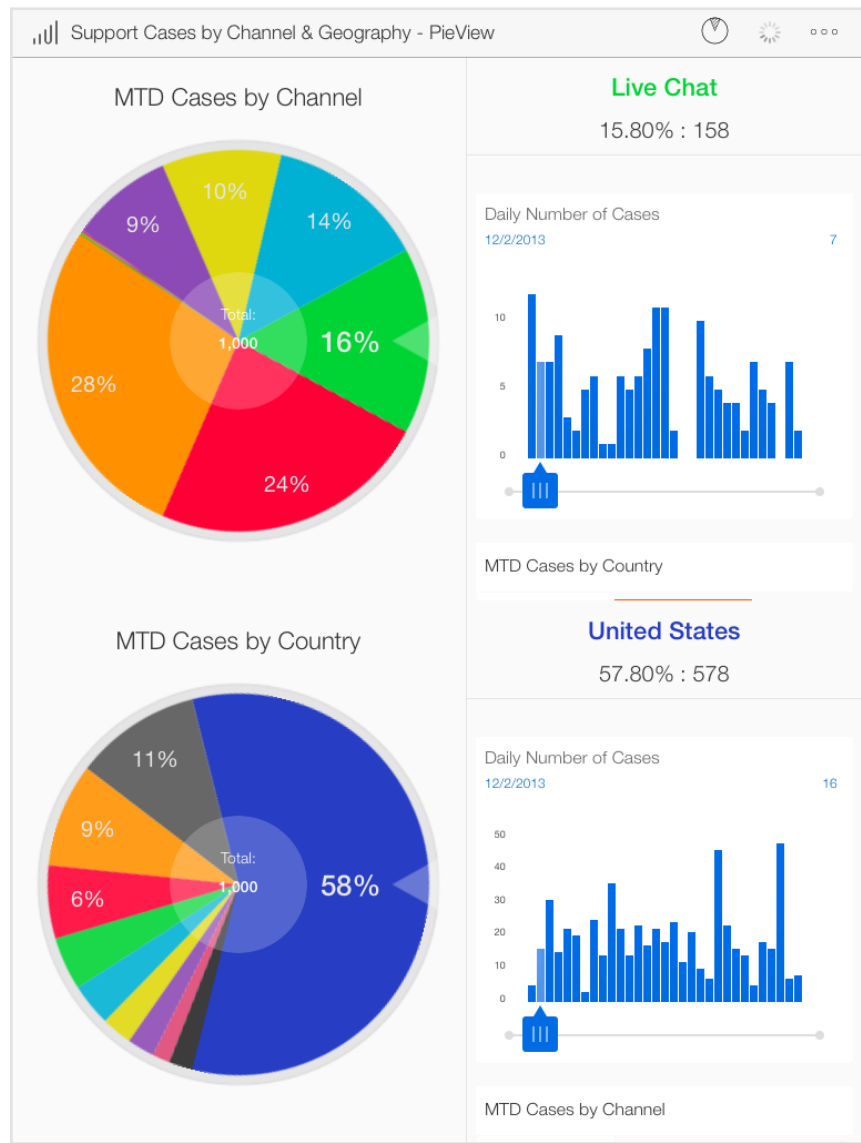
While many of these nine pillars seem like “givens” in any customer success program, the most important aspect I’ve lightly touched on until now.

There is a reason big data, little data, cloud data, etc. are the topics of conversation - because they work. Businesses no longer have an excuse not to be utilizing their information as it is easier than ever to consume and share it.

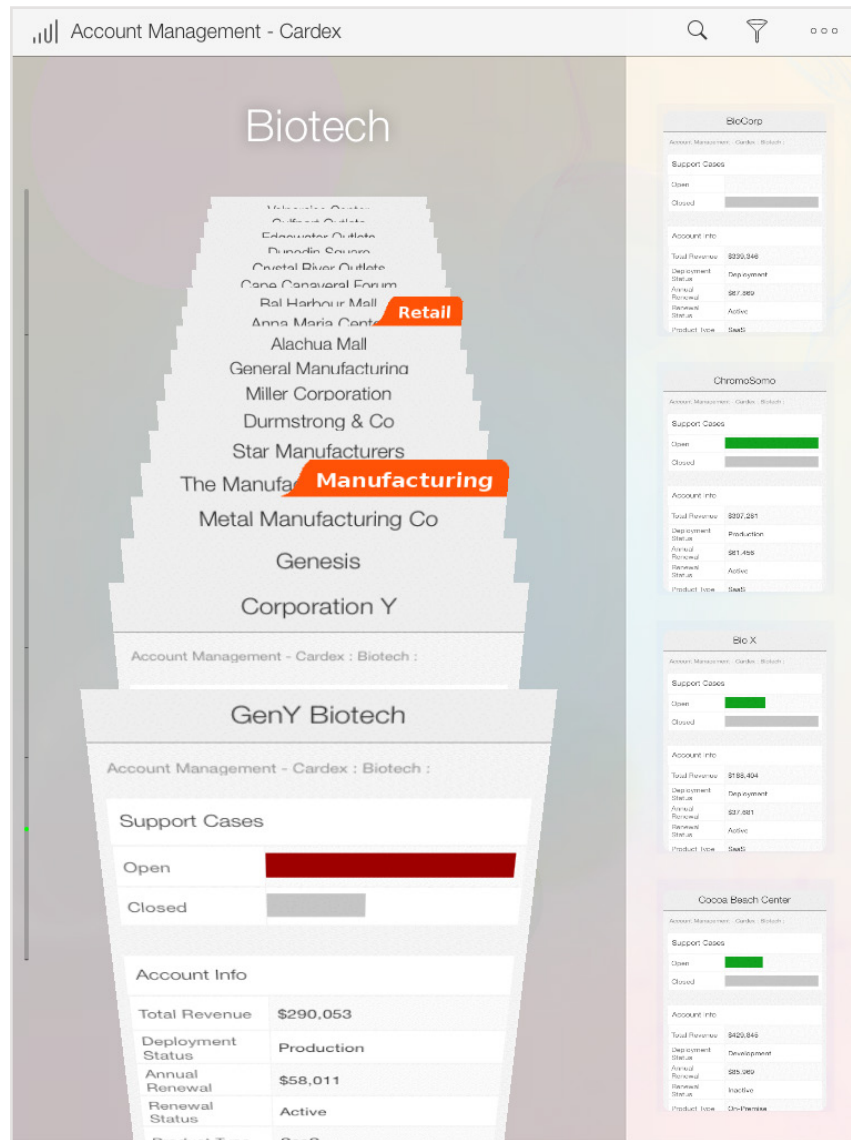
I’ve included a few of the metrics we use to maintain successful customer relationships. These reports, and many more, affect the decisions we make everyday. It works because in 2 minutes our team can open, analyze and act.



The team manages our support cases via Roambi Trends. At a glance we can quickly see where we stand, how we've improved and track the variance between two time periods.



We like to think of Cardex as our personal pocket rolodex. It is the easiest way to track account specific information like support cases, status and number of licenses with just a few swipes. When speaking with a customer I can pull out my iPhone and show them all the touch points we've had with their team.



With its simplicity, the PieView tells us so much, especially with the more general and larger chunks of data. I can easily tell where and when we need to focus our customer support efforts and adjust appropriately. This allows us to give customers the service they need, how and when they want it.

Conclusion

The customer success department is the hardest, but certainly the most rewarding position in any organization. You are either the hero or the villain and that status changes depending on what customer you speak with.

With my team, here is how I preface our role in the business:

Members of the Customer Success team are the flight controllers and are contacted by pilots (our customers, the project champions) when there are unforeseen issues. Depending on the flight path and the type of incident, our job is to guide the pilot via the safest route possible and ensure a pleasant flight. Some issues are extremely urgent and require immediate help, while other times the pilot wants to ensure the best approach is taken and plan ahead. Regardless of the type of situation, the Customer Success team is pivotal in assuring pilots and passengers are happy and get to their destination with the least amount of turbulence possible.

