



SuccessCOACHING

THE CUSTOMER SUCCESS COMPETENCY MODEL

Identifying the Key Skills and Disciplines of World-Class
Customer Success Organizations and Professionals



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INTRODUCTION

Raising the Bar on Customer Success

What does it take to be a competent Customer Success professional in today's competitive marketplace? What behaviors and attributes are required to improve and advance effectiveness within the company and with the customer? What traits does a Team Leader possess that others don't?

The importance of various skills may differ for Customer Success professionals based on their specific roles. However, these differences don't make an impact at the overall discipline level. Regardless of product, industry, or business model, the five disciplines included in the Customer Success Competency Model represent the most critical factors for assessing and determining the differences between high and low performing Customer Success professionals.

SuccessCOACHING's extensive research has revealed that the **accomplished Customer Success professional is defined by five disciplines and 18 skills.**

The disciplines are:

- Emotional Intelligence
- People and Teamwork
- Entrepreneurship and Strategy
- Behaviors
- Drive

With a deep look at the five disciplines and 18 Skills required for Customer Success, SuccessCOACHING breaks down the

guiding principles that play a pivotal role in developing communication strategies and business dynamics for your—and your customer's—ultimate success.

What makes this guide to the Customer Success Competency Model distinctive is its approach.

This is no buzzword-filled monograph or academic dissertation. It's meant to be actionable and easy for both the practitioner and leader to understand and apply.

Using our **Customer Success Competency Model (CSCM)**, you will gain a better understanding of everything it takes to excel in post-sales, customer-facing support and success roles.

These universally applicable principles will help companies improve their Customer Success programs by:

- Providing a consistent, scalable model for developing effective leaders and team members
- Empowering Customer Success team members to take charge of their professional growth with concrete examples of success-based traits
- Establishing how key attributes help create successful collaboration and achieve objectives and outcomes

What is a Competency Model?

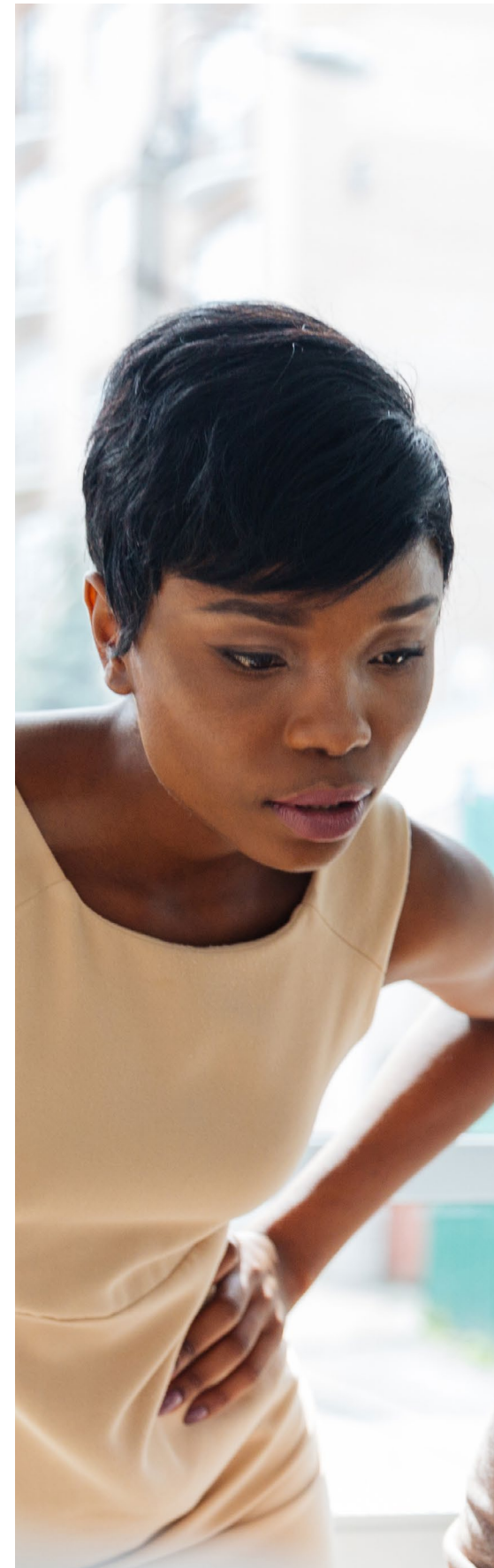
We all use competencies; they are simply the knowledge, skills and abilities needed to perform our daily work activities. A competency model organizes these competencies into a format that is focused on defining the behaviors that are required for the effective performance in a specific job or professional role.

Competency models can be used as a resource for developing curriculum and selecting training materials, identifying certification requirements, writing job descriptions, recruiting and hiring workers, and evaluating employee performance.

The Value of a Competency Model

A competency model helps to define what separates "good" from "great." Not everything a person does in a given role should be part of the competency model. For example, any Customer Success Manager should be able to perform basic customer service functions, but a great Customer Success Manager can elevate their customer relationships in a way that enables them to transcend the typical vendor-customer relationship, transforming their role into one where they are looked to as a trusted adviser who can help shape the strategic direction of the relationship.

In essence, the value of a competency model is that it identifies what skills each person in the organization must be able to do in order to be "great" in their role. If everyone in an organization performs at the "great" level, then the organization's human capital has achieved its potential, and the company is likely to experience a competitive advantage based on the performance of its resources and operations.



GUIDE TO USING CUSTOMER SUCCESS CORE COMPETENCIES

We are often asked what the Customer Success Competency Model is, how to use it, and what benefits are gained from using it. Using a competency model helps you identify disciplines and key skills of your organization and the Customer Success Managers on your team.

IN THIS SECTION WE'RE GOING TO LOOK AT:

- The difference between skills and competencies, and an example of each
- What a competency model is and how to use it in your company
- The benefits of using our Customer Success Competency Model

The Difference Between Skill & Competency

Skills and competencies are often confused as the same thing, and while they share similarities, the two concepts have different definitions. Skills and competencies function differently and should be looked at separately in the workplace.

- A **skill** is a specific task you can get better at with intentional practice. Skills can be thought of as the 'what,' as in what abilities someone needs to perform a task.
- A **competency** is the capability to perform certain tasks, which may require one or more individual skills. A competency is more like the 'how,' as in how someone behaves to perform a task.

The difference between a skill and competency is subtle but important. A competency is a combination of skill, ability, and knowledge. Competencies are also behavior-based, so you have to look at an individual's behaviors to get an idea of their competency levels.

Let's take handling a customer complaint, for example:

- A Customer Success Manager **who is skilled** will be able to handle the conversation with the customer, ask probing questions, come up with a solution, and follow up with the customer.
- A Customer Success Manager **who is competent** will be able to confidently handle the conversation, discover the true cause of the complaint, come up with multiple solutions, follow up with the customer, proactively ensure the same thing is not happening with other customers, and work with other teams in the company to prevent the issue in the future.

How a Competency Model is Helpful

A competency model (CM) is a framework defining the key skills, disciplines, and behaviors needed for effective performance in a specific job.

Competency models are gaining popularity in business organizations, especially within human resource departments. A CM takes the complications out of defining job roles, assessing performance, and developing training plans.

Discover the Five Key Disciplines of the Accomplished Customer Success Professional

Our competency model lists a set of competencies which are then broken down into behaviors and skills. There are different proficiency standards focused on creating the desired outcome at good, better, and best levels.



How Are Competency Models Used?

The Customer Success Competency Model we have created consists of five major disciplines, which are further broken down into 18 specific skills. Using this CSCM will give you a better understanding of what it takes to succeed in post-sales, customer-facing support, and Customer Success roles.

Create an Accurate Job Profile: Starting from the beginning of the hiring process, use the CSCM to accurately outline the job profile of the position you are hiring for. Use the disciplines and skills to create an accurate description of the role and responsibilities.

Hire Stronger Candidates: Human resource personnel and hiring managers can use the CSCM in the screening and interviewing process to find the best candidates. The CSCM shows them exactly what skills to look for.

Hold Your Existing Team to a Well-Defined Standard: Assessing the team you have in place is easier when the CSCM shows you what to look for. A clear standard helps you create consistency across your entire team, regardless of their experience or tenure.

Create a Targeted Learning & Development Plan: The CSCM can act as a roadmap for your team and their success. Using the three different proficiency standards—Contributor, Senior Individual Contributor, and Leader—you can assess strengths and weaknesses to create a specific training plan for everyone.



Benefits of a Competency Model

Introducing the CSCM can benefit your company, team, and employees in several ways. With regular use of the model, you'll see both short-term and long-term gains.

Improved Hiring Process: You can refer to the CSCM for every step of your hiring process, from creating job postings to selecting final candidates. Thanks to a competency-based job profile, targeting and evaluating candidates is much more effective which will save you time and money.

Addressing Skill Gaps: Skill gaps and knowledge-based issues among your existing team are easier to spot when you know the 18 key skills of the CSCM. Spotting these gaps means you can develop your human capital and create a positive impact on the business.

Defining Roles and Responsibilities: The well-defined job profiles as a result of using the CSCM means managers can set expectations for everyone. Take it one step further and it's easier to evaluate performance against clear expectations.

UNDERSTANDING CUSTOMER SUCCESS PROFESSIONALS CAREER LEVELS

The Customer Success Competency Model distinguishes between three different career levels: Individual Contributor, Senior Individual Contributor, and Leader. As titles and organizational models vary, SuccessCOACHING has sought to normalize and simplify the various career levels to ensure clarity.

Individual Contributor

An “Individual Contributor” level Customer Success professional is characterized in the following way:

- Is a specialist, or is a generalist with limited experience (1-3 years)
- Has responsibilities such as, but not limited to, supporting Customer Success initiatives initiated by company leadership, executing Playbooks and processes as established by Customer Success leadership, and operating at the tactical and transactional levels with customers in their portfolio of accounts.
- Holds a formal title such as, but not limited to, Customer Success Manager (CSM), Implementation Specialist (IS) or Account Manager.



Senior Individual Contributor

A “Senior Individual Contributor” level Customer Success professional is characterized in the following way:

- Is a very experienced generalist or specialist (4-6 years)
- as responsibilities such as, but not limited to, developing and leading implementation plans and analyzing business information to create complex Success Plans for strategic accounts, developing and streamlining operational Playbooks and processes and developing best-practice training for the Customer Success team.
- Holds a senior title such as, but not limited to, Senior Customer Success Manager, Senior Account Manager or Customer Success Director.

Leader

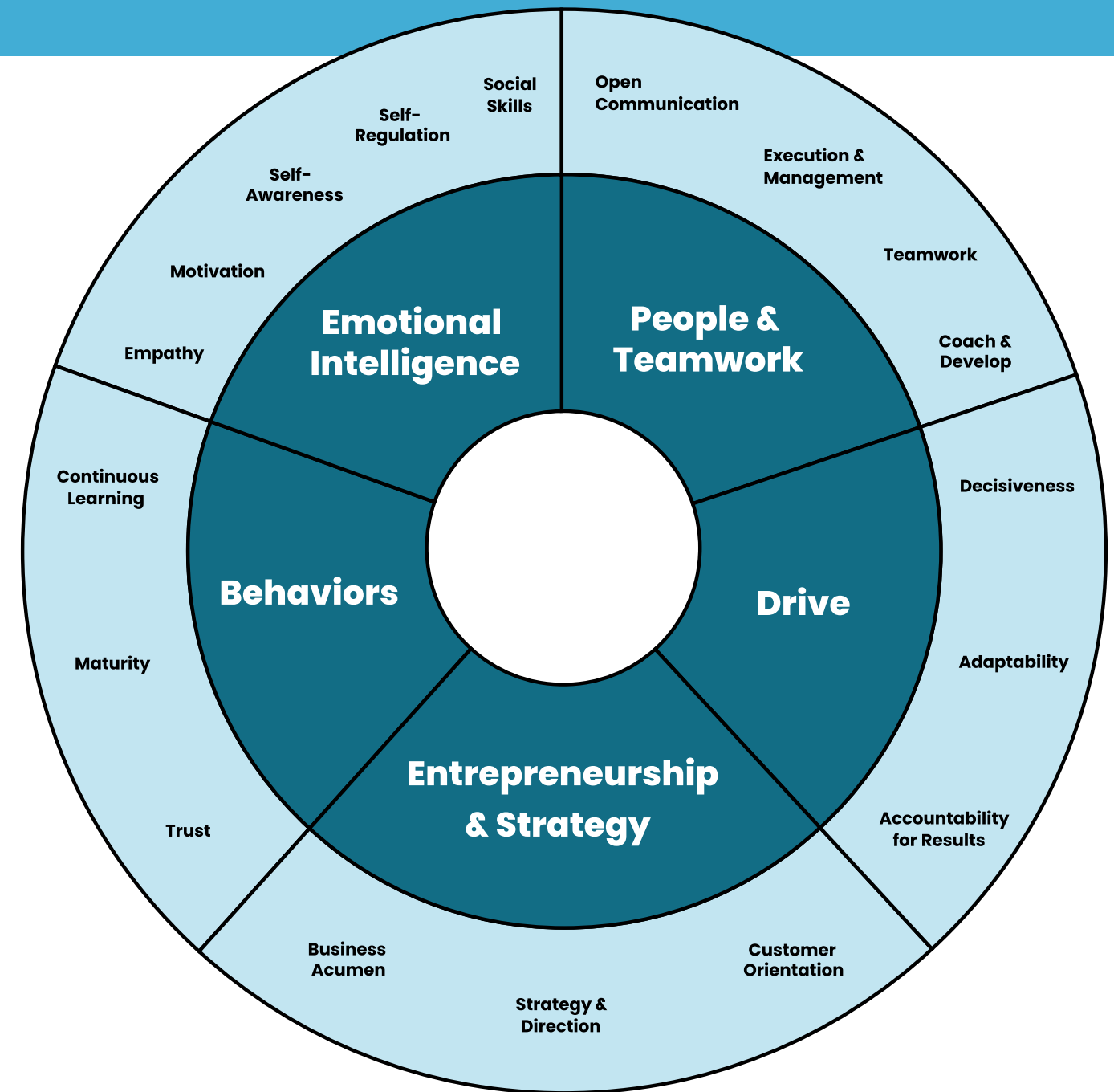
A “Leader” level Customer Success professional is characterized in the following way:

- Typically are the most senior leaders in Customer Success (8+ years)
- Serves as an organizational leader and has responsibilities such as, but not limited to, design of Customer Success Strategy, establishing team roles and responsibilities, setting performance standards and hiring of Customer Success resources.
- Holds the top Customer Success jobs in the organization such as, but not limited to, Team Lead, Manager/Director of Customer Success, Vice President of Customer Success or Chief Customer Officer (CCO).

THE FIVE DISCIPLINES OF CUSTOMER SUCCESS

The Customer Success Competency Model defines the knowledge and skills that are critical for resources in post-sales customer-facing support and success roles, organizing them into five Disciplines as depicted below. The five Disciplines include:

- 1. Emotional Intelligence** – The capacity to be aware of, control, and express one’s emotions and to handle the interpersonal relationships required when working for and with a diverse customer base.
- 2. People and Teamwork** – The abilities related to working with and managing the relationships and communications with team members internally and within customer organizations.
- 3. Entrepreneurship and Strategy** – Employing customer-oriented innovative approaches to achieving desired outcomes and possessing the mindset and “sense” required to understand and process business situations.
- 4. Behaviors** – Approaching peers, customers, and work output with the right work ethic and open-mindedness to achieve results and grow.
- 5. Drive** – Having the ability and desire to achieve and own results whether good or bad.





EMOTIONAL INTELLIGENCE



EMOTIONAL INTELLIGENCE

Emotional intelligence, which is also known as emotional quotient (EQ), is “the capacity to be aware of, control, and express one’s emotions and to handle the interpersonal relationships required when working for and with a diverse customer base.” In layman’s terms, it’s the ability to recognize, understand and manage the emotions of yourself, and of others.

Emotional intelligence matters because it means having an awareness about how emotions can dictate decisions and actions, which can then have real-world implications. For example, having a high emotional intelligence can make the difference between vastly different outcomes in a scenario.

THIS SECTION WILL DISCUSS:

- What is emotional intelligence, and why is it important?
- Emotional intelligence and Customer Success.
- Ways to improve our emotional intelligence.
- Ways to recognize and measure emotional intelligence.

What It Is

Some of the skills that are most crucial in the workplace aren’t taught in classrooms, or even offered in on-the-job training. These are known as “soft skills,” and can include things like active listening and organization. But one of the most vital and misunderstood skills might be emotional intelligence. We know that emotional intelligence is not only a highly-desirable trait for employees to have, but one that directly correlates to workplace success. Data tells us that that 90% of top performers across all industries rank high in emotional intelligence, and in a 40-year study, it was determined that emotional intelligence was 400% more powerful than IQ at predicting success.

Why It’s Relevant

Emotional intelligence is actually one of the key disciplines of Customer Success, and it’s vital to having a Customer Success team that creates satisfied customers.

EMOTIONAL INTELLIGENCE & CUSTOMER SUCCESS

Professionals join Customer Success from many backgrounds, and may come to the field after working in sales, customer service, and tech support, for example. While technical skills like data analysis and familiarity with a CRM can be helpful at launching a career as a Customer Success Manager, there are plenty of soft skills that are integral to thriving in Customer Success, with emotional intelligence being a key discipline.

A Customer Success professional needs to possess emotional intelligence because it can help them accomplish their main goals, which is to reduce churn, increase the value of customer contracts, and give customers the best experience possible. A Customer Success Manager with emotional intelligence will be able to effectively respond to their customers, even if they're moody or upset, and smooth over situations with ease.

They'll also be able to do things like predict the needs of their customers, and be able to manage their own emotions, if situations become tense. Customer Success Managers with emotional intelligence will have patience and thoughtfulness, will be curious, and will be masterful at relationship management.

5 PILLARS OF EMOTIONAL INTELLIGENCE

- **Motivation**
- **Empathy**
- **Self-Awareness**
- **Self-Regulation**
- **Social Skills**

WAYS TO IMPROVE OUR EMOTIONAL INTELLIGENCE

If you're looking to improve your emotional intelligence, here are some ideas to get you started:

Work on managing emotions: Managing our own emotions is a big part of improving emotional intelligence. To help manage your own emotions, pay close attention to how you respond to things. If you notice you can be particularly reactive to a situation, you can take a period of time before you respond to it. Also, find an outlet to manage your own stress, such as meditation, yoga, working out, or something else that you enjoy doing.

Seek out other perspectives: Honing emotional intelligence means also understanding the emotions of others, so it's important to hear from people with other perspectives and opinions than yourself. This will help you see different sides of situations, and will sharpen your ability to understand other people.

Practice active listening: Active listening can be very useful in developing emotional intelligence, because it'll lead you to pay close attention to what others are saying, and how they're responding to situations. You'll start noticing how others react, and have a better handle on steering a conversation towards certain outcomes.





MOTIVATION

What It Is

The personal drive to improve and achieve, commitment to one's goals, initiative, or readiness to act on opportunities, and optimism and resilience.

Why It's Relevant

Motivation is the force that drives one to do things. Possessing a personal drive to achieve will cascade to your customers and help them to achieve their goals and objectives.

Motivation is the personal drive to improve and achieve, commitment to one's goals, and the readiness to act on opportunities. Motivation is important to Customer Success because it's the force that drives our actions, and possessing motivation will reflect in your work. Here's what motivation might look like for different Customer Success professionals:

For Individuals: Individual Customer Success Managers who are motivated will be willing to learn, will work with leaders to set goals, and will seek out opportunities. They'll also be optimistic, and self-starters.

For Senior Individual Contributors: A senior Customer Success professional who is motivated will be able to learn, but also willing to teach others. They'll set personal goals, seek feedback, will exude optimism, and be very resilient.

For Leaders: Leaders who are motivated will actively teach and coach, they'll help others achieve their goals and overcome weaknesses, and look for ways to improve their team.

MOTIVATION

PROFICIENCY STANDARDS

Standards for proficiency at the three career stages.

Individual Contributor	Senior Individual Contributor	Leader
Grittiness and the desire to learn.	Ability to learn and teach others.	Actively teaches and coaches peers and subordinates on goal setting and attainment.
Works with a leader to set realistic goals and a plan to achieve them.	Sets personal goals and relentlessly pursues them without much persuasion from others.	Helps others achieve their goals, providing guidance and support for programs to help them achieve them.
Seeks out opportunities to improve when informed of weaknesses.	Seeks constant feedback in order to improve.	Works with others to help them overcome weaknesses.
Acts on opportunities that are offered to them.	Actively seeks out opportunities and seizes them when they occur.	Regularly looks for opportunities to improve the team and persuades individual team members to pursue them.
Optimistic and somewhat resilient, although sometimes needs to be “talked off a ledge” in particularly negative situations.	Overtly optimistic, and very resilient, with an ability to bounce back from challenging set-backs.	Exudes optimism internally and externally, and encourages team members that have faced set-backs to keep on going.
Is self-motivated, either by intrinsic or extrinsic motivators rather than a feeling of obligation.	Understands and is able to communicate what motivates them to do things.	Clearly conveys expectations regarding motivation and risk taking to the team.
	Knows how to take the right level of risk, taking into account the situation, and one’s decision authority.	Committed to personal and organizational goals and focusing on the team to go the extra mile to achieve them.
	Committed to achieving personal, organizational, and (realistic) customer goals.	Motivated to help team members overcome obstacles to achieving personal, organizational, or customer goals.
	Identifies own weaknesses and seeks out opportunities to improve.	



EMPATHY

What It Is

Having the awareness of the needs and feelings of others (both individually and in groups) and being able to see things from their point of view.

Why It's Relevant

Helps to develop a better understanding of other people's situations along with customer-focused orientation. Learning to listen effectively to both the verbal and non-verbal messages of others while using questions to discover more about the situation and how others feel are important elements of achieving empathy.

Empathy is having the awareness of the needs and feelings of others, and being able to see things from their point of view. It's relevant to Customer Success because it can help develop a better understanding of people's situations. Here's what empathy might look like for different Customer Success professionals:

For Individuals: Individual Customer Success Managers who are empathetic will be able to understand other points of view, be able to take on other perspectives during a conversation, and will practice active listening.

For Senior Individual Contributors: A senior Customer Success professional who is empathetic will be skillful at managing conversations, will understand how another person feels and what they are thinking, and will be able to leverage empathy during situations.

For Leaders: Leaders who are empathetic will be able to tap into that empathy in a crisis, and be self-aware, and self-regulate. They'll also reward and praise team members, provide constructive feedback, and provide mentoring and coaching.

Emotional intelligence is one of the fundamental disciplines of Customer Success, and having it is crucial to thriving in the field. Emotional intelligence might be a soft skill, but it directly correlates to workplace success across the board. Possessing emotional intelligence allows a Customer Success Manager to be aware of, control, and express their own emotions, and do the same for the emotions of their customers and coworkers.

EMPATHY

PROFICIENCY STANDARDS

Standards for proficiency at the three career stages.

Individual Contributor	Senior Individual Contributor	Leader
Ability to understand other points of view and separate emotions from the facts.	Skilled at managing conversations with others by understanding other points of view and controlling the emotional aspects of a conversation.	Ability to be emotionally empathetic, especially in a crisis, along with the ability to be self-aware and self-regulate (e.g. detach) from the situation at hand.
Able to take on another perspective during conversations and/or negotiations.	Practices cognitive empathy, understanding how another person feels and what they are thinking. Also known as perspective taking.	Rewards and praises team members for their strengths and accomplishments.
Practices active listening skills and is able to tune into emotional cues.	Ability to effectively leverage empathy during situations requiring persuasion and negotiation.	Provides constructive feedback designed to focus on how to improve.
Practices cognitive empathy to understand someone's thoughts and emotions in a very rational, rather than an emotional, sense.	Has a service orientation, putting customer needs first while looking for ways to improve their satisfaction and loyalty. Goes the extra mile.	Provides mentoring and coaching to help others to develop to their full potential.
	Understands the "politics" of one's own organization and the ability to recognize the politics at work in customer organizations.	Provide stretching assignments that will help their team members develop.
		Leverages diversity to create and develop opportunities through different kinds of people that can bring something different to the table.



SELF-AWARENESS

What It Is

The ability to understand and monitor one's emotions, strengths, weaknesses, drives, values, and goals, and to recognize their impact on others while using gut feelings to guide decisions

Why It's Relevant

Being aware of one's emotions is key to controlling them and one's behaviors while managing effective interactions with others.

Self-awareness is the ability to understand and monitor one's own emotions, strengths, weaknesses, drive, values, and goals. It's also the ability to recognize one's impact on others, while using their gut feelings to guide decisions. Self-awareness is important for Customer Success because being aware of our own emotions is key to controlling them, as well as controlling our behaviors during interactions.

For Individuals: Individual Customer Success Managers who are self-aware will be aware of their own emotion, will understand and own their strengths and weaknesses, and will seek out the feedback of others. They'll also be able to control their own emotions in most circumstances.

For Senior Individual Contributors: Senior Customer Success professionals who are self-aware will be not only aware of their own emotions, but be able to recognize emotions in their team. They'll work with team members to help improve themselves, will demonstrate self-motivation, and will be aware of how their feelings affect them and their job performance.

For Leaders: Leaders who are self-aware will understand the importance of this trait, and be able to demonstrate self-regulation to the team. They'll be aware of weaknesses and hire people who perform well in areas that they themselves lack, will be receptive to ideas of others, and will be able to effectively influence others.

SELF-AWARENESS PROFICIENCY STANDARDS

Standards for proficiency at the three career stages.

Individual Contributor	Senior Individual Contributor	Leader
Is aware of their own emotions.	Is aware of their own emotions and is also able to recognize emotions in their team and help harness them.	Understands the importance of self-awareness and possesses the ability and desire to demonstrate self-regulation to the team.
Understands and owns their strengths and weaknesses and is interested in ways to improve them.	Works with team members to help them improve themselves.	Aware of weaknesses and hires subordinates who perform well in areas where the leader is lacking.
Seeks out feedback from others.	Demonstrates self-motivation and manages stressful situations well.	Receptive to ideas of others on the team.
Is able to control one's emotions in most circumstances.	Acutely aware of how one's own feelings affect them and their job performance.	Has excellent interpersonal relationships within and outside of the team.
	Is able to separate facts from emotions when assessing and dealing with challenging situations.	Is able to effectively influence others.
		The teams these individuals lead consistently perform at or above expectations.



SELF-REGULATION

What It Is

The ability to respond to the demands of dealing with situations and using a range of emotions that are tolerable and flexible enough to permit or delay reactions as needed.

Why It's Relevant

Controlling or redirecting disruptive emotions and impulses while adapting to changing circumstances helps avoid and resolve conflicts and making matters worse

Self-regulation is the ability to respond to the demands of dealing with situations, using a range of emotions that are tolerable and flexible enough to permit or delay reactions as needed. This is important for Customer Success because controlling or redirecting disruptive emotions and impulses while adapting to circumstances can help avoid and resolve conflicts.

For Individuals: Individual Customer Success Managers who self-regulate will be able to control emotions for the most part, especially in front of customers, and will be able to maintain good relationships with peers during periods of stress. They'll also be able to maintain a stable and calm demeanor in the face of challenging situations.

For Senior Individual Contributors: Senior Customer Success professionals who self-regulate will be skilled at managing emotions and dealing with "hot" situations, and will be able to act in one's long-term best interests, as well as the best interests of the company. They'll also be able to calm oneself down, and be able to focus on values rather than feelings.

For Leaders: Leaders who are able to self-regulate will maintain composure in the face of significant pressure from both internal and external forces, and will be able to help others do the same. They don't seek to blame others for situations, and will instead address the root cause of issues. They'll also focus on values instead of emotions, be aware of how to appropriately react to emotions, and be able to think about a situation before communicating one's thoughts and feelings.

SELF-REGULATION PROFICIENCY STANDARDS

Standards for proficiency at the three career stages.

Individual Contributor	Senior Individual Contributor	Leader
Ability to control emotions for the most part, especially in front of customers, but may express more “passion” behind closed doors.	Skilled at managing emotions and dealing with “hot” situations both internally and externally.	Able to withstand and maintain composure in the face of significant pressure or demands from both internal and external forces.
Is able to maintain good relationships with peers in periods of high stress.	Ability to act in one’s long-term best interests and the best interests of the company.	Ability to maintain a stable and calm demeanor and help others maintain their emotions in the face of stressful or challenging situations.
Ability to maintain a stable and calm demeanor in the face of challenging situations.	Ability to calm oneself down when upset and cheer oneself up when down or challenged.	Does not seek to blame others for a situation and focused on addressing the root cause of a problem to alleviate it.
	Is able to focus on values rather than feelings, separating the facts from the emotion.	Focuses on deepest values and the values of the organization rather than feelings or emotions.
		Aware of emotions and how to react appropriately to them.
		Able to absorb a situation and think about it and other perspectives before communicating one’s thoughts and feelings.



SOCIAL SKILLS

What It Is

The skills needed to handle and influence other people's emotions effectively, including persuasion and influencing skills, communication skills, conflict management skills, leadership skills, change management skills, building rapport, and collaboration skills.

Why It's Relevant

To deal with customers and the internal resources one depends on to achieve expected customer outcomes, one must be able to effectively influence individuals and successfully collaborate.

Social skills refers to the skills necessary to handle and influence other people's emotions effectively. These skills include persuasion, communication, conflict resolution, and leadership skills, along with building rapport and being able to collaborate. Social skills are relevant to Customer Success because in order to achieve desired customer outcomes, a Customer Success professional needs to be able to effectively influence people and be able to collaborate. Here's what social skills might look like for different Customer Success professionals:

For Individuals: Individual Customer Success managers who have social skills will listen to others more than they speak, they'll be able to address conflict, and will be able to collaborate effectively with others. They'll also be able to influence others, and will exude interest in their customers and their businesses.

For Senior Individual Contributors: A senior Customer Success professional who has social skills will practice active listening, will be able to address conflicts, and be able to influence through persuasion and thoughtfulness.

For Leaders: Leaders with social skills will possess executive level interpersonal communication skills, will be able to address conflicts within their sphere of influence, and will be able to collaborate with team leaders in other organizations. They'll also lead through influence, be able to recognize non-verbal cues, and will encourage the team to actively engage in the communities they serve.

SOCIAL SKILLS PROFICIENCY STANDARDS

Standards for proficiency at the three career stages.

Individual Contributor	Senior Individual Contributor	Leader
Listens to others more than they speak.	Understands and practices effective listening skills.	Possesses executive level interpersonal communication skills.
Possess solid interpersonal communication skills.	Possesses excellent interpersonal communication skills.	Ability to effectively and fairly address interpersonal conflicts within their sphere of influence.
Able to address most intra-personal conflict (conflict within oneself) and some interpersonal conflict (conflict between oneself and another).	Able to effectively address their own intra-personal conflicts and interpersonal conflicts they may have with others.	Ability to effectively work with the broader team to manage and address intra-group conflicts that arise.
Collaborate effectively with other individual contributors.	Influence through thoughtfulness and persuasion.	Ability to effectively collaborate with team leaders in other organizations to manage and address intergroup conflicts that arise.
Ability to influence others through thoughtfulness (i.e. data).	Effective collaboration within and outside their team.	Leads through influence with political savviness, building and maintaining trust, and leveraging their internal network of advocates.
Exudes authentic interest in their customers and their businesses.	Interacts regularly with others both internally and externally.	Ability to recognize non-verbal cues.
Cooperates and collaborates effectively with others.	Manages customer and internal relationships effectively.	Encourage the team to actively engage in the communities they serve.
Avoids negative thinking and complaining and has an overall positive attitude.	Understands and leverages the most effective channels for communicating with others (internal and with customers).	Demonstrates authentic interest in team members and others.
Understands the differences between being assertive and being aggressive. Projects opinions without making others feel like they are wrong.	Accepts criticism without being defensive.	
Is teachable and a good student.		



Emotional intelligence is a key discipline that is necessary to excel in Customer Success, and by using these five pillars, we can measure our own status and growth. Even if we think we're highly emotionally intelligent, it might be worth taking some times to self-reflect, as one Yale professor believes that "many of us tend to overestimate our own emotional intelligence."

Customer Success professionals with high levels of emotional intelligence will ultimately be pros at things like problem solving, decision making, staying cool under pressure, and conflict resolution.



PEOPLE & TEAMWORK



PEOPLE & TEAMWORK

People and Teamwork refers to the abilities related to working with and managing the relationships and communications with team members internally, and also within customer organizations. It's not enough to simply be excellent at your job on your own in a vacuum, and instead, you need to be able to communicate effectively, collaborate, and coach others in order to really excel in Customer Success.

THIS SECTION WILL DISCUSS:

- What is people & teamwork, and why is it important?
- People & teamwork and Customer Success.
- Ways to improve people & teamwork.
- Ways to recognize and measure people & teamwork

What It Is

People and Teamwork covers the skills necessary to communicate effectively with both your coworkers and your customers. While many Customer Success professionals work independently to manage their clients and achieve goals, we also know that being able to communicate and collaborate with other people is at the heart of Customer Success work. Customer Success is a relationship-centric field, and the way you nurture and treat your relationships greatly impacts your ability to achieve your goals. Mastering these skills might mean the difference between being able to succeed in your role, and missing the mark.

Why It's Relevant

Customer Success work requires strong relationships with both clients and coworkers, and managing relationships well takes specific skills.

PEOPLE, TEAMWORK AND CUSTOMER SUCCESS

While a lot of tasks in Customer Success seem like solo work, there's no way to deliver success without working with other people. Not only do you need to have a good rapport with your customers, but you also must work well with your teammates and personnel in other departments if you want to accomplish your goals.

Without strong and open communication, Customer Success professionals may miss the mark when it comes to their customers' desired outcomes, and put themselves at risk for churn.

Internal relationships are also critical because Customer Success professionals often rely on colleagues in order to do their job. Solid collaboration with other team members will allow for operational efficiencies and often help a CSM problem solve.



WAYS TO IMPROVE PEOPLE SKILLS AND TEAMWORK

If you're looking to improve people skills and teamwork, here are some ideas to get you started:

Foster open communication: Hone your communications skills by regularly meeting with colleagues to discuss current challenges and recent wins, or create an asynchronous method to do so, like a Slack channel. This will help to share ideas, allow practice on effective communication, and create an environment where teamwork is valued.

Identify key areas of improvement: Before trying to improve your people and teamwork skills, identify which specific areas are currently lacking and then set goals and plans to improve those. For example, if you notice you tend to avoid tough conversations, look for courses on tips on how to increase your confidence in those situations, and seek out opportunities to practice.

Look for career development opportunities: Take the lead on a project or make an active effort to formally learn new or adjacent skills. By putting yourself out there within your team and your company, you'll be forced to practice communicating, teamwork, and active learning, all helping you to improve your people skills.



OPEN COMMUNICATION

There are certain skills and practices which separate the “good” from the “great” when it comes to Customer Success, many of them related to people and teamwork. This includes concepts of how people work together, how they use creative solutions to address issues, and how they establish trust. Under this umbrella discipline, we have the practice of open communication, a crucial component to having a high-performing Customer Success team. Open communication refers to an environment where information flows freely and transparently, and where decision making is based on win-win situations.

THIS SECTION WILL DISCUSS:

- Why does a Customer Success professional need open communication?
- How you can change your mind about open communication
- How you can practice open communication
- Ways to recognize & measure open communication

What It Is

Creating an environment in which information flows freely and openly, and where decision making is based on win-win situations.

Why It's Relevant

Open communication encourages effective expectation setting and management with internal resources and customers.

WHY DOES A CUSTOMER SUCCESS PROFESSIONAL NEED OPEN COMMUNICATION?

Working in Customer Success can sometimes be an isolating experience. You're responsible for your own accounts and customers, you might rarely communicate with others in your department, and you might be used to communicating only during negative circumstances.

Even more often, Customer Success professionals might feel isolated from other departments in their own company. This has been cited as a common problem, and can lead to disjointed company culture, and even fragmentation.

If we're practicing open communication, there will be a regular flow of communication within Customer Success, between departments within our organization, and even with customers. This can be very useful for Customer Success professionals because you'll not only have access to more information yourself, which can be valuable for Customer Success goals, but more decisions will be made which offer win-win scenarios.





HOW YOU CAN CHANGE YOUR MIND ABOUT OPEN COMMUNICATION

If you don't currently practice open communication, and you're not quite sold on it, it's important to see the value for yourself, and your company as a whole. Having access to more information, and having a seat at the decision-making table requires supplying more information, or practicing open communication yourself.

Plus, being successful in open communication will help you develop other useful skills, such as active listening and public speaking.

HOW YOU CAN PRACTICE OPEN COMMUNICATION

If you're looking to practice open communication, here are some ideas to get you started:

Ensure there's an open forum: In order to practice open communication, there needs to be an acceptable place for this to happen. You can create, or ask a senior manager to create, a dedicated Slack channel or other networking page, specifically for sharing open communication surrounding customers. It can be a designated forum, where everyone is able to share and absorb information. You can also create another channel for sharing internal company information.

Create a daily sharing habit: In order to practice open communication, you need to actually participate in the communication process. If you're short on ideas of what to share, you can start by sharing inspiring quotes from customers, customer success stories, or challenges your customers are facing. You'll likely find that others in your company appreciate what you have to say, and have something to add to it as well.

Share objectives and results: Senior professionals should be outlining regular objectives for their team, to ensure internal alignment, and then sharing the results regularly. Singular Customer Success Managers can then participate in these directives. This can be a practice which makes sure each team is in sync, and that other departments are on board with what each distinct unit is doing.

Host or participate in regular meetings: In order for there to be a flow of open communication, there needs to be regular face-to-face (or Zoom-to-Zoom) meetings. These can be within Customer Success, as well as inter-departmental. These can be "coffee break" style meetings, or a working lunch, where people are able to share, and ask questions.



WAYS TO RECOGNIZE & MEASURE OPEN COMMUNICATION

Open communication looks different for Customer Success professionals at different career stages. Here's how you can recognize and measure your own proficiency in open communication:

For Individuals: Individual Customer Success Managers who practice and foster open communication will apply active listening techniques, such as asking the right questions. They'll communicate clearly to the level of the audience, making sure messages have been received, and will show tact when communicating with customers. They'll also keep both customers and colleagues informed, and prepare ahead for meeting with customers to ensure they're articulate and accurate.

For Senior Individual Contributors: A senior Customer Success professional who is practicing open communication will be able to add value to the information flow between direct management, and the rest of the organization. This might look like them passing on important issues in a positive manner. They'll also listen to the ideas of others, and speak up tactfully in disagreements.

For Leaders: Leaders who are practicing open communication will promote a free flow of information, opinions, and communication through the organization. They'll also engage in conversations with others in all business units, to ensure everyone that needs to be involved in the dialogue is participating.

Open communication is one of the most important pillars of Customer Success, and it's not something that's necessarily inherent in the department, or within organizations. Creating an environment in which information flows freely and openly takes work from everyone, from individual contributors all the way through to leadership, but it's well worth the effort.

FOSTER OPEN COMMUNICATION

PROFICIENCY STANDARDS

Standards for proficiency at the three career stages.

Individual Contributor	Senior Individual Contributor	Leader
Applies active listening techniques, asking the right questions and searching for underlying meanings.	Adds value to the information flow between direct management and the rest of the organization by extracting and passing on the important issues in a positive manner.	Promotes a free flow of information and communication throughout the organization.
Communicates clearly to the level of the audience, checking to ensure that messages have been received and understood.	Listens to the ideas of others.	Engages in conversation with others in all business units to ensure everyone that needs to be involved in the dialogue is participating.
Shows tact and diplomacy when communicating with customers.	Speaks up tactfully in disagreements with colleagues, customers or others.	Encourages an open flow of ideas and opinions.
Keeps customers/colleagues informed by updating them on the progress of major projects.		
Prepares ahead for meetings with customers to ensure articulate and accurate delivery of facts and information.		



THIS SECTION WILL DISCUSS:

- Why a Customer Success Manager needs project management skills
- How Customer Success professionals can practice better project management
- Ways to recognize and measure project management skills

EXECUTION & MANAGEMENT

Working in Customer Success can sometimes seem like a paradox, because while it is goal-centric and focused on outcomes, the day-to-day can be full of surprises. Customer Success is simply unpredictable, and in order to excel in the field, you have to be prepared for any and all situations. Beyond just handling these unpredictable situations, Customer Success professionals need to actually be able to have control of the situations around them, in order to achieve their customer objectives and outcomes. This skillset is known as execution and project management, and it's critical when it comes to the Customer Success industry.

What It Is

The ability to manage and influence the actions, activities, and expectations of both external and internal resources to achieve customer objectives and outcomes.

Why It's Relevant

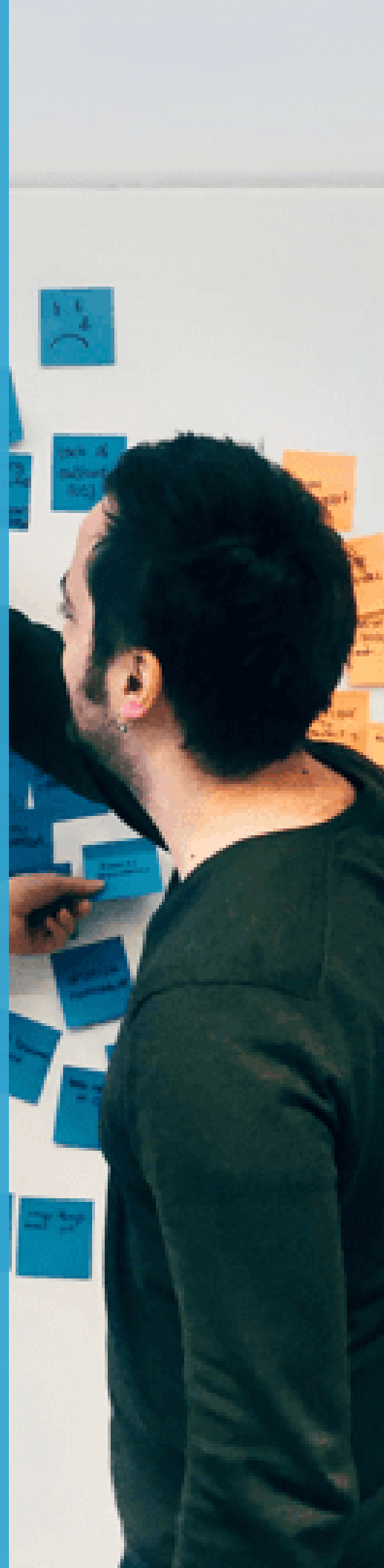
Managing activities and expectations is a cornerstone of Customer Success and achieving objectives in anything you do.

WHY A CUSTOMER SUCCESS MANAGER NEEDS PROJECT MANAGEMENT SKILLS

Project management can be a role in itself, and it may initially seem unrelated to Customer Success. But a Customer Success professional who is masterful at project management skills will be much more likely to achieve their goals, and will be able to work better both with their coworkers and customers.

Project management skills refers to the ability to lead a group in order to achieve certain objectives. As a Customer Success Manager, when unexpected scenarios come your way, you need to be able to assess the situation at hand and map out appropriate steps. After you've established this roadmap, you also need to be able to influence the actions, activities, and expectations of both internal and external resources, in order to achieve your customers objectives and outcomes

Having execution and project management skills as a Customer Success professional can truly mean the difference between successfully achieving your goals, and missing the mark. These skills are not only useful on their own, but they can also help you become savvy at other components of Customer Success, such as expectation management, having difficult conversations, organization, and time management.



HOW CUSTOMER SUCCESS PROFESSIONALS CAN PRACTICE BETTER PROJECT MANAGEMENT

If you're looking to level up your execution and project management skills, here are some ways you can practice better project management.

Be an excellent communicator- Being able to effectively communicate is a huge component of successful project management. If you want to become a better communicator, you can start by practicing open communication. Being an excellent communicator will help you do things like have difficult conversations with ease and clearly define expectations.

Set firm goals- Setting firm goals ensures that projects stay on track, and can be vital for ensuring objectives actually get accomplished. Setting firm goals might look like outlining time frames, managing expectations, and keeping track of goals for the duration of a project.

Practice transparency- Practicing transparency means that you're communicating clearly with both internal and external resources, and that you're communicating progress. If you're practicing transparency you'll also communicate any project redirection, and you'll demonstrate ownership and accountability for your own work.

Track progress- Tracking the progress of your efforts is crucial to successful project management. This means that you'll keep track of how your work is matching up with your expected timeline, and monitoring not only your work, but the work of others, using Customer Success metrics and performance measures.



WAYS TO RECOGNIZE AND MEASURE PROJECT MANAGEMENT SKILLS

Customer Success professionals at different career stages are going to practice project management skills in different ways. Here are some metrics for success that you can use to mark your own proficiency and progress in project management:

For Individuals: An individual Customer Success Manager who is practicing project management will be a pro at anticipating workflows and deadlines, and will be able to plan to prevent potential obstacles before they become problems. They'll eliminate practices that detract value to get quality results, and will also set realistic expectations with everyone involved. An individual Customer Success Manager will also ensure their own contributions are completed on time, will successfully execute technical requirements for the job, and be able to have difficult conversations with ease.

For Senior Individual Contributors: A senior Customer Success professional who is practicing project management will clearly define expectations when assigning tasks, and drive issues to conclusions. They'll use performance measures to track progress during the project, and will develop and use procedures to ensure that the quality of work meets expectations. They'll also be able to effectively influence others in external organizations, and will develop long-term goals to stay focused and organized.

For Leaders: Leaders who are practicing project management will assign appropriate resources and remove obstacles for their team, they'll encourage others to achieve beyond their expectations, and will provide help and support. Leaders will also set clear and challenging time frames, will delegate and empower others, and will set increasingly challenging goals. Lastly, a leader will ensure their own team is responding rapidly to Customer Success issues and putting in extra effort when needed.

Having a handle on your execution and project management skills will ultimately help you succeed at accomplishing your own Customer Success goals, and achieving wins for your customers. You'll not only be better at managing time and maximizing efficiency, but you'll become a stronger leader, and will provide solid support for your team and those around you.

EXECUTION AND EXPECTATION MANAGEMENT PROFICIENCY STANDARDS

Standards for proficiency at the three career stages.

Individual Contributor	Senior Individual Contributor	Leader
Anticipates work-flows and deadlines by reviewing work required against similar projects, and plans to prevent potential obstacles from becoming problems.	Clearly defines expectations when assigning tasks.	Assigns appropriate resources and removes obstacles.
Eliminates all non-value-added practices to get quality results.	Drives issues to conclusions.	Encourages others to achieve beyond their expectations, providing help and support when needed.
Sets realistic expectations with internal and external customers, taking into account activities and actions that fall outside of direct control.	Uses performance measures to track progress.	Sets clear and challenging time frames.
Works to indirectly influence resources outside of direct control to commit to specific timeframes and timelines in order to achieve expected objectives.	Develops and uses procedures to ensure that work meets the company standards of quality.	Delegates and empowers others to fulfill their responsibilities.
Ensures own contribution to team effort is always completed on time, taking ownership for it and demonstrating accountability.	Ability to effectively influence others in external organizations.	Sets increasingly challenging goals for own team to elicit higher and higher levels of performance.
Knows and executes the technical requirements of the job.	Develops long-term goals to keep focused and organized.	Ensures that own team responds rapidly to customer issues, putting in extra effort when needed, to meet the customer's requirements.
Able to have "difficult" conversations with others and customers.		



TEAMWORK

On a Customer Success team, each individual team member matters, and oftentimes, Customer Success can be a fairly autonomous role. You're responsible for your own clients, for example, and might not feel the need to collaborate with other Customer Success Managers. But in order to have a high-performing Customer Success team, there needs to be a strong collaborative environment, where everyone is focused on teamwork.

In workplaces in general, studies have shown that collaboration is central to driving workplace performance, and the same is definitely true for Customer Success. Teamwork in Customer Success means that team members work together to foster a collaborative environment where people share information, rely on each other's expertise, deliver on commitments, and trust one another.

THIS SECTION WILL DISCUSS:

- How teamwork is central to Customer Success
- Ways to practice better teamwork
- How to measure success in teamwork

What It Is

Working together to foster a collaborative environment where people actively share information, rely on each other's expertise, deliver on commitments, and trust one another

Why It's Relevant

Being able to collaborate well with your co-workers and your customers strengthens relationships, the quality of work, and the ability to deliver.

HOW TEAMWORK IS CENTRAL TO CUSTOMER SUCCESS

While the feeling of teamwork can be motivating and contribute to enjoyable office culture, teamwork is much more than just a positive feeling. It's a set of repeated actions that we each do, in order to ensure that we're working in a fast, collaborative environment. A Customer Success team that is fragmented probably doesn't practice open communication (or communicate very well at all), might lack purpose and long-term goals, and likely doesn't recognize internal wins. It might also have team members who are individualistic, and put their own gain above the company's, which can actually bring lasting harm to the organization. When a Customer Success team isn't unified, it's not only the team and the company that will suffer: customers are also going to feel that fragmentation.

A Customer Success team that is a collaborative powerhouse will be unified in goals, frequently share and communicate, will have clear purpose, and will recognize team members who hit milestones. Everyone will look out for one another, which will make the organization not only a better place to work, but will ensure the Customer Success team is smashing its goals.



WAYS TO PRACTICE BETTER TEAMWORK

Communicate frequently: Openly sharing information, such as wins and struggles, is a big part of practicing teamwork. For example, instead of competing against other Customer Success Managers, your team can celebrate wins universally. In order to communicate, set aside a Slack chat for updates such as these, or have a weekly video conference roundup, where Customer Success Managers can celebrate their success, and discuss mutual challenges they're all facing. In addition to communicating frequently, ensure your team is actively listening to each other!

Set clear goals: In order for a Customer Success team to hit its goals as a whole, there needs to be clearly-defined goals in the first place. This can look like specific Customer Success metrics or milestones, for example. If there are clear goals outlined for the Customer Success team, everyone will know what they're working towards, and where they each stand in relation to what's expected of them, which can encourage collaboration in order to succeed.

Clearly define roles: Nothing can fragment a team like muddled responsibilities. If there's a lack of clarity for different roles and tasks, a team could be fostering a culture of competition, instead of collaboration. By clearly defining roles and responsibilities, work will be delegated properly, and Customer Success team members will know what's expected of them. Not only that, but if they want to take on more or different responsibilities, they'll have goals to work towards.

Encourage group decision-making: Big decisions don't always need to come from the top-down, and on certain issues, they can be a collaborative effort. Group decision-making might look like everyone contributing their opinion on the matter at hand. It will allow each team member to feel like their opinion is valued, and that they're involved in the team activities.



HOW TO MEASURE SUCCESS IN TEAMWORK

Customer Success professionals at different career stages are going to practice teamwork in different ways. Here are some benchmarks you can use to measure your own proficiency and progress in teamwork:

For Individuals: Individual Customer Success Managers who are practicing teamwork will act as a team player, will take ownership for team results, and will step in for other team members when necessary. They'll also share information with team members, cooperate instead of compete, celebrate successes with colleagues, and understand everyone's strengths and weaknesses.

For Senior Individual Contributors: Senior Customer Success professionals who are practicing teamwork will place team success over individual success, will be able to spot hidden tension within the organization and help facilitate conflict resolution, and will also seek to involve or integrate people of different cultures. They'll also congratulate colleagues and celebrate successes with individuals and the team.

For Leaders: Leaders who are practicing teamwork will seek to maximize the interests of the company before individual interests and they'll confront people who put individual interests ahead of the company's. They'll also be able to build effective teams committed to organizational goals.

A Customer Success team that is unified and collaborative is much more likely to become the successful revenue center that it's designed to be. Not only will internal relationships be stronger, and the quality of work maximized, but customers will also reap the rewards of this collaborative environment.

TEAMWORK

PROFICIENCY STANDARDS

Standards for proficiency at the three career stages.

Individual Contributor	Senior Individual Contributor	Leader
Acts as a team player.	Places team success above individual gain.	Seeks to maximize the interests of the Company before "local" interests.
Takes ownership for team results, stepping in for team members when necessary, without being asked.	Recognizes hidden or "dormant" conflict within the team and immediately and pro-actively facilitates a beneficial resolution of the conflict by bringing it into the open.	Confronts people who put individual/local gain above the Company's interests.
Knows what it means to work in a matrix organization, taking steps to network and build partnerships.	Seeks to involve or integrate people of different cultures.	Builds effective teams committed to organizational goals.
Shares information with team members, co-operating at all times rather than competing.	Congratulates colleagues and celebrates success with individuals and team.	
Celebrates successes with colleagues and team members.		
Promotes a team culture, understanding everyone's strengths and weaknesses, and recognizing colleagues' contributions.		

COACH AND DEVELOP

When you hear the word “learning,” you may think of your bygone years of classrooms and pouring over textbooks. But the truth is, being able to continuously learn is a critical part of excelling in Customer Success for professionals of every career level.

Knowing how to learn on the job is important because businesses change constantly, technology is ever in flux, and we have to constantly adjust to new consumer behavior. Despite this importance, very few of us are ever taught formally how to learn in the workplace.

If you yourself are a coachable Customer Success professional, you’re also poised to be an excellent coach to other Customer Success professionals, as well as your customers, ultimately fostering a healthy learning environment across your organization.

THIS SECTION WILL DISCUSS:

- What does healthy learning look like in the workplace?
- How you can learn how to learn.
- How to measure success in coaching.

What It Is

Guiding others to make the most of their available skills in order to develop and grow, whether internal to the organization or within a customer organization

Why It’s Relevant

To deliver Customer Success, one must regularly coach and develop customer stakeholders and users in order to push the business process changes necessary to deliver business value through adoption of one’s solution(s).

WHAT DOES HEALTHY LEARNING LOOK LIKE IN THE WORKPLACE?

All Customer Success professionals need to embrace the idea that workplace learning and coaching is something that should be ongoing, cyclical, and easily accessible. Customer Success professionals need to be coachable because of the fluid nature of Customer Success work, and the ever-changing business landscape today. On the flipside, Customer Success professionals also need to be able to coach their peers, to pass along this new knowledge in a healthy cycle that contributes to the company's success.

While there can be relaxed and casual opportunities for learning, consistent learning in the workplace should be a clearly defined effort. This might look like having clearly defined goals ("I want to learn this specific new skill"), setting aside practice times, and laying out concrete steps.

Learning can also happen in a more relaxed setting, but even these should have definitions and goals. For example, if a coworker wants to shadow your work for the day, they shouldn't just drop by unannounced and lurk in the corner. Instead, they can set aside a specific time, come prepared with a notebook, practice active listening, and engage in what's going on.

Coaching that's not clearly defined might ultimately be more harmful than helpful, because it might seem burdensome and draining to the people involved. That's why laying out clear definitions and goals should be a priority, when implementing workplace learning.



HOW YOU CAN LEARN TO LEARN

While learning at work is crucial to excelling in Customer Success, we're rarely ever taught exactly how to learn, or best-practices. If you're eager to learn better in the workplace, and also become a better workplace coach to others, here are some tips to keep in mind:

Set clear goals: Instead of just learning something new because you have to, or your boss is making you, identify clear reasoning and goals for your learning efforts. Do you want to learn a new skill, improve your Customer Success metrics, or generate more revenue for your company? Having clear goals will help you stay motivated to successfully learn or coach, and put your new lessons into practice.

Put learning on the schedule: Learning may be something you're interested in, but unless you actually put it in your schedule regularly, it's likely something that will fall on the backburner. Learning should be scheduled with regularity, and once it's scheduled, it shouldn't be treated as something that's optional.

Make the most of coaching: If you're learning from other employees, make the most of the time you have with your "coach." Listen actively, take notes, and come prepared with specific questions. Others in your organization can be a huge resource, and if you get their time and energy, you should work to make the most of it.



Keep a growth mindset in mind: How are you growing today? If you approach your work from the perspective of having a growth mindset, you'll welcome new challenges, see new learning opportunities, and put continuous effort into learning.

Grow your network: If you want to continue learning and growing, it's important to expand your network to include more people who you would want to learn from. You can ask your coworkers to make introductions, for example, to make useful connections.

Make your efforts known: If you're eager to learn on the job, or to coach, make your efforts known to your superiors, and to your team. If you tell your manager you're looking for learning opportunities, maybe they'll make that useful introduction for you, or set you up to shadow a more experienced Customer Success professional. No one will know what you want unless you speak up and make it known.



HOW TO MEASURE SUCCESS IN COACHING

Every Customer Success professional can take steps to become a better learner, and also a better coach. Here's how you can measure your own proficiency and progress in learning and coaching:

For Individuals: Individual Customer Success Managers who are proficient in learning and coaching will listen actively and demonstrate empathy, will share expertise with customers, and will offer suggestions to customers to help them decide on solutions. They'll also tailor development suggestions to fit individual and organizational needs, will be able to instruct and train, and will promote a team culture.

For Senior Individual Contributors: Senior Customer Success Professionals who are proficient in learning and coaching will provide specific and constructive feedback, and will realistically assess strengths and weaknesses in others. They'll also ensure that both individuals and the team realize their full potential, and be able to push end users to change their teamwork process and approach, in order to incorporate new ideas.

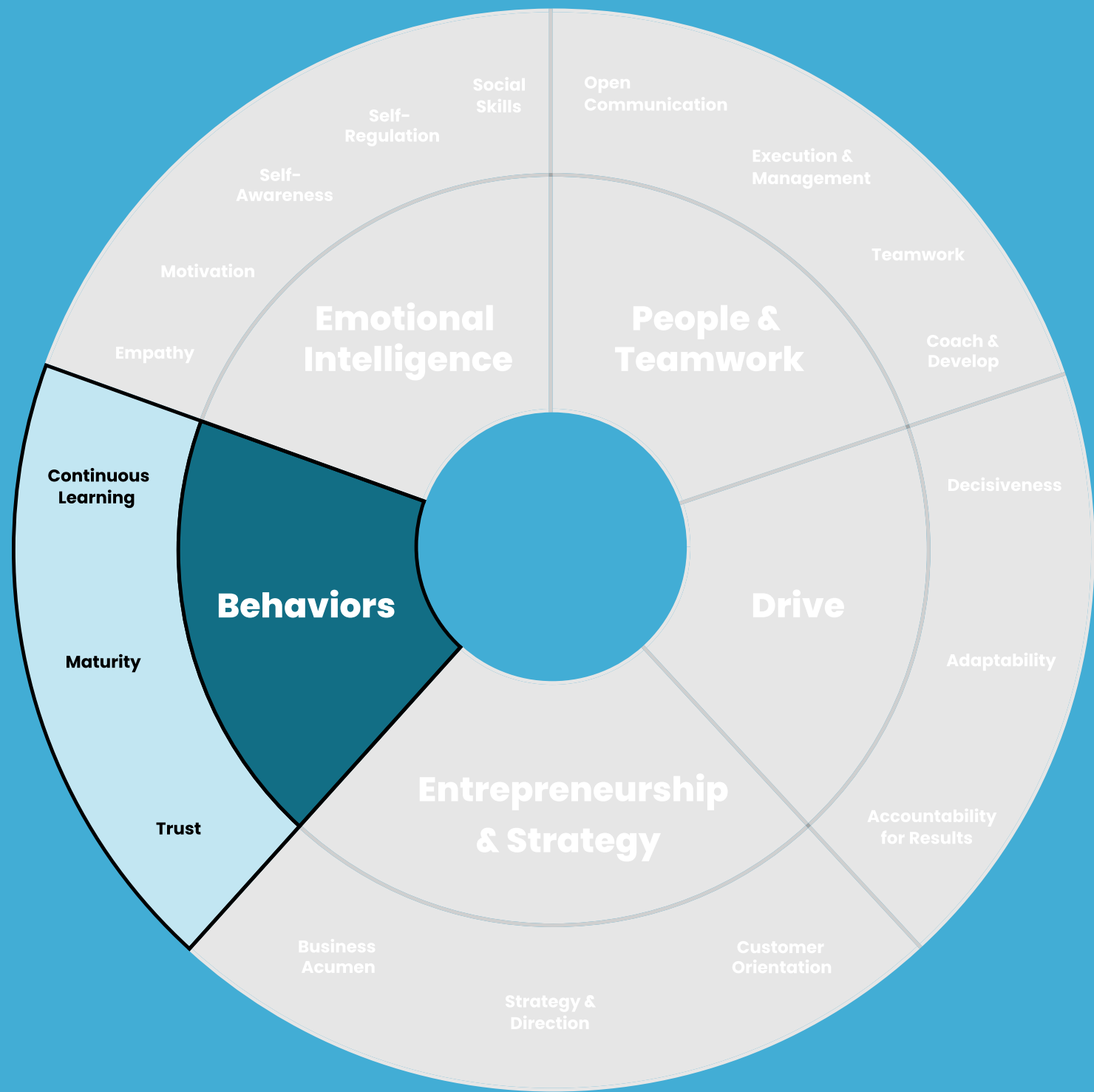
For Leaders: Leaders who are proficient in learning and coaching will provide challenging assignments that stimulate people's development, they'll develop successors and talent pools for key positions, and provide honest feedback to employees. They'll create an environment of coaching and mentoring, and let people know when results are not up to expectations.

Embodying a growth mindset is a key part of continuously excelling in Customer Success. By having cognitive flexibility and being an excellent learner, and by subsequently being a helpful coach to others, you'll not only strengthen your own skills, but contribute to a healthy culture of learning at your organization.

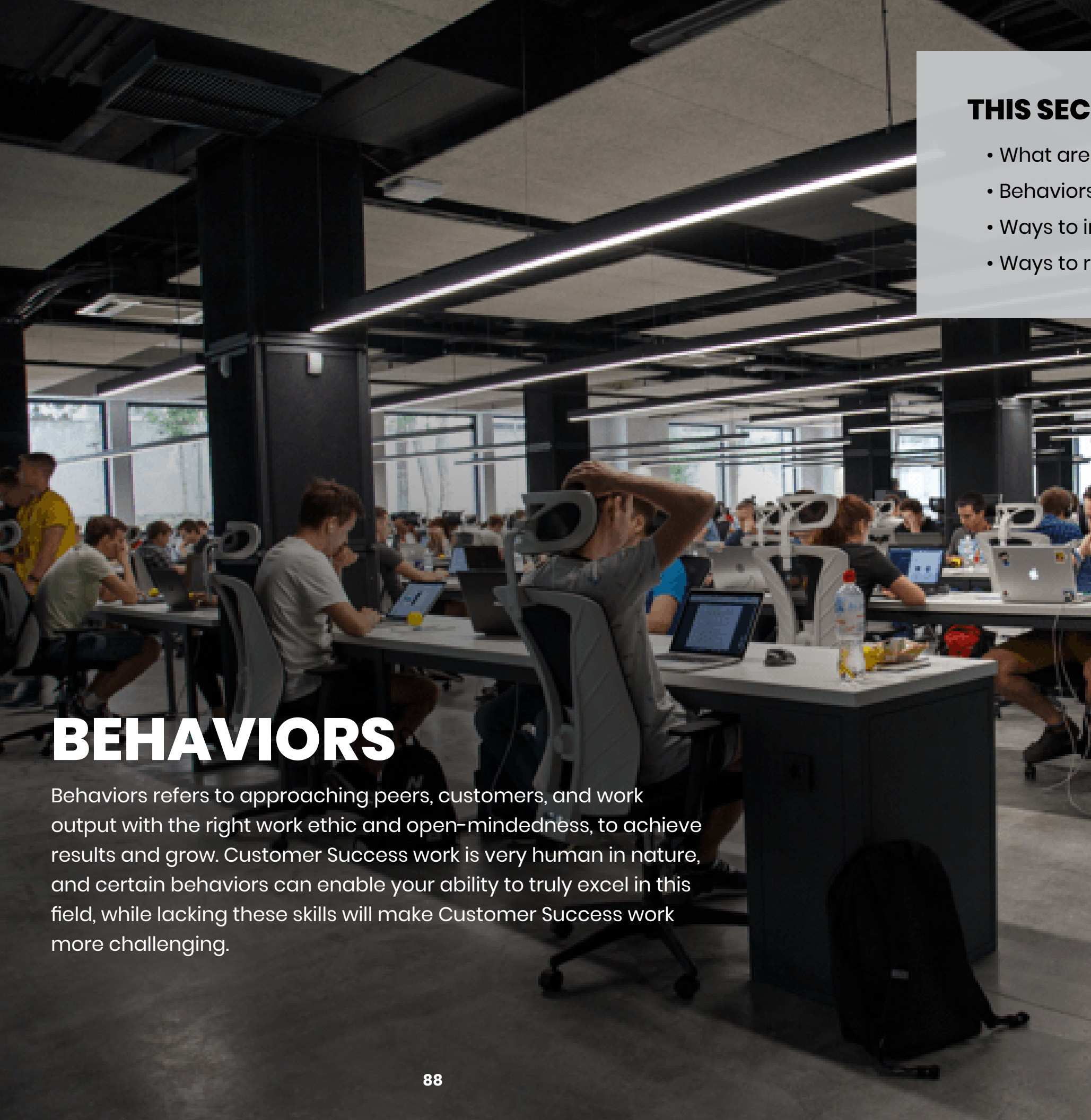
COACH AND DEVELOP PROFICIENCY STANDARDS

Standards for proficiency at the three career stages.

Individual Contributor	Senior Individual Contributor	Leader
Listens and demonstrates empathy through body language and non-verbal cues.	Provides specific and constructive feedback.	Provides challenging assignments that stimulate people's development, even outside of their own area.
Shares expertise with internal customers, taking the time to check each customer's level of understanding.	Realistically assesses strengths and weaknesses in others.	Develops successors and talent pool for key positions.
Offers suggestions, not decisions, to internal and/or external customers to help them find solutions.	Ensures that both individuals and the team realize full potential.	Provides honest feedback to employees about performance development opportunities and problems.
Tailors development suggestions to fit individual and organizational needs.	Ability to push end users to change their work process and approach in order to incorporate new ideas.	Creates an environment where coaching and mentoring become part of the everyday way of doing business.
Ability to instruct and train, conveying concepts and details in a manner they can interpret.		Lets people know when results are not up to expectations.
Promotes a team culture, understanding everyone's strengths and weaknesses, and recognizing colleagues' contributions.		



BEHAVIORS



BEHAVIORS

Behaviors refers to approaching peers, customers, and work output with the right work ethic and open-mindedness, to achieve results and grow. Customer Success work is very human in nature, and certain behaviors can enable your ability to truly excel in this field, while lacking these skills will make Customer Success work more challenging.

THIS SECTION WILL DISCUSS:

- What are behaviors, and why is it important?
- Behaviors and Customer Success.
- Ways to improve behaviors.
- Ways to recognize and measure behaviors.

What It Is

While many behaviors are useful for Customer Success work, we highlight a few that can have a big impact on your role. For example, being able to build and provide trust can help you have strong relationships with your clients and coworkers, but it can also be a delicate thing to practice and requires special attention. Maturity plays a big role in the Customer Success landscape, because sometimes we find ourselves in difficult situations, or things don't go as planned, and we still need to keep our cool. Lastly, Customer Success is an ever-changing field, and being able to continuously learn can help ensure you're ahead of the curve.

Why It's Relevant

The way you approach your Customer Success work can greatly impact your performance and how you feel about the job. Honing several key behaviors can make a massive difference in your results and outlook.



BEHAVIORS AND CUSTOMER SUCCESS

We all know that feeling when you need a service done, and some people just hit the mark, although you may not know why. Whether it's your car, a haircut, customer service rep, or barista taking your coffee order, when we deal with people, our interactions are much more pleasant and successful when these people employ certain behaviors. Clients would much rather work with a Customer Success Manager who they trust and who is mature in tense situations. Furthermore, a Customer Success professional who is continuously learning will always be adapting and growing, and will use every experience as a valuable lesson to constantly improve.



WAYS TO IMPROVE BEHAVIORS

While many behaviors are useful in Customer Success, we highlight a few that we believe are absolutely vital, but these are certainly not the end-all-be-all. Here's how you can work to improve behaviors which are useful to Customer Success:

Prioritize trust: The best Customer Success professionals are the ones who have the trust of their clients and coworkers, and it should be something that you seek to build, and that you're careful with. While we have a whole section on building trust, you should always always keep it at the forefront, and let building trust guide your actions.

Don't take things too personally: When tensions start to rise (as they likely will in your Customer Success work), it's important to remember that most of the time, you shouldn't take things too personally. You can use this mindset to help you hone your maturity, but also to reduce stress, stay calm, and build drive for your work.

Always look to improve: If you're always looking to do better, you'll employ behaviors that help you get there. This means that you'll seek to continuously learn, but you'll also do things like learn from past mistakes, find mentors, and seek to find innovative solutions to your Customer Success dilemmas.



CONTINUOUS LEARNING

Customer Success is a field that is constantly changing, as customer and organizational needs continuously evolve. Practicing continuous learning, or actively pursuing learning and self-development opportunities, is something that separates the mediocre Customer Success teams from the stellar, high-performing ones. Continuous learning is what enables us to ensure client needs are met time and time again, and that we're keeping up with the latest Customer Success learnings and practices. Despite how crucial continuous learning is, it doesn't happen all on its own. It involves active participation in learning, and reporting what has been learned, in order to modify future behaviors.

THIS SECTION WILL DISCUSS:

- Why continuous learning is central to Customer Success
- How to practice continuous learning
- How to measure proficiency in continuous learning

What It Is

Active pursuit of learning and self-development opportunities, including seeking feedback and welcoming unsolicited feedback in order to modify behavior

Why It's Relevant

Strong continuous learning skills are required to successfully adapt to changing demands by a variety of customer personas and organizations. Customer Success practices should be constantly evolving, with all experiences viewed as potential learning opportunities. Doing so will help re-examine assumptions, values, methods, policies, and practices.

WHY CONTINUOUS LEARNING IS CENTRAL TO CUSTOMER SUCCESS

Customer Success is a department that bridges an organization with its customers, and Customer Success professionals need to be experts at fulfilling both internal and external needs. Because customers and organizations are in a constant state of evolution, with changing needs and goals, Customer Success departments need to be constantly evolving as well.

Customer Success departments can become stagnant in their own ways, with the mentality of “if it’s not broken, don’t fix it.” Indeed, why would we want to update values, methods, policies and practices, if they’re serving us well at the time? That’s because if we resist continuous learning and growth, these practices which once worked well can quickly turn ineffective and dated. By staying ahead of the curve in a practical, on-the-job way, and adopting a growth mindset, a Customer Success department can continuously smash its goals, and best serve both its organizations and its customers.

HOW TO PRACTICE CONTINUOUS LEARNING

Seek feedback: An important part of continuous learning is understanding how your actions are being perceived, and how the results of your actions are landing. By seeking feedback from both your customers and people within your organization, you’ll be gaining access to a valuable trove of information.

Welcome unsolicited feedback: There’s an important distinction between actively seeking feedback, and welcoming unsolicited feedback. Welcoming unsolicited feedback means practicing active listening and open communication, so that your coworkers and customers feel comfortable sharing feedback with you. This type of feedback can be very valuable, but it requires you to be a trusted resource, and respond well to feedback, so others are inclined to share.

Practice mindfulness: Continuous learning happens when you’re fully present, and aware of what’s going on around you, because all actions and reactions can be perceived as lessons. Practicing mindfulness at work might look like staying focused on the tasks and communications at hand, doing one task at a time instead of multitasking, and taking steps to reduce stress.

Create a learning forum: Continuous learning should not be a solo venture, and should be department-wide. In order to make sure that everyone is practicing continuous learning, create a learning forum where people can share what they’re learning. This might look like a Slack channel or chat room, dedicated to dropping interesting links and sharing customer feedback.

Have a running “to-learn” list: Since continuous learning is just that, continuous, there should always be a running list of things that you’re interested in learning. Keep a list at your desk or on your phone of articles to read, tools to try out, concepts to explore, and questions to ask your colleagues and customers. You don’t have to tackle everything at once, but having a list will help ensure you’re always exploring and learning.





HOW TO MEASURE PROFICIENCY IN CONTINUOUS LEARNING

Strong continuous learning skills are required by Customer Success professionals at every career level, but manifest in different ways. Here are some markers to measure proficiency in continuous learning:

For Individuals: Individual Customer Success Managers who are proficient in continuous learning will actively pursue learning and self-development opportunities, and will learn from both positive and negative experiences. They'll also continuously look for new ideas and approaches to improve personal and team effectiveness, will seek and apply new information and ideas quickly, and will ask for help and learn from other team members when necessary.

For Senior Individual Contributors: Senior Customer Success Professionals who are proficient in continuous learning will create a climate of continuous improvement by sharing new information about improved business process and customer services as widely and rapidly as possible. They'll also use their expert knowledge, along with an in-depth business understanding, to create a vision of what the business could be, and will continuously challenge themselves and others to discover alternative ideas.

For Leaders: Leaders who are proficient in continuous learning will be particularly adept at seeking and welcoming unsolicited feedback, and will modify behaviors in light of that feedback.

Approaching Customer Success from a perspective of curiosity will help encourage continuous learning through all career stages and phases. By taking intentional steps to practice continuous learning, a Customer Success team can ensure that it's able to accomplish its goals with ease.

CONTINUOUS LEARNING

PROFICIENCY STANDARDS

Standards for proficiency at the three career stages.

Individual Contributor	Senior Individual Contributor	Leader
Actively pursues learning and self-development opportunities.	Creates a climate of continuous improvement by sharing new information about improved business processes and customer service as widely and as rapidly as possible throughout the organization.	Seeks feedback and welcomes unsolicited feedback.
Learns from both positive and negative experiences.	Uses knowledge of own and/or other areas of expertise along with an in-depth business understanding to create a vision of what the business could be.	Modifies behavior in the light of feedback.
Continuously looks for new ideas and approaches to improve personal and team effectiveness.	Continuously challenges self and others to discover alternative ideas that lead to new ways of meeting business objectives.	
Seeks and applies new information and ideas quickly.		
Willingly asks for help and learns from team members when necessary.		

TRUST AND MATURITY

Trust is a critical element of everyday life, but it also holds a central role in the business landscape today, especially when we're talking about Customer Success. Research tells us that in general, trust is a deciding factor in where shoppers spend their money. In Customer Success, trust holds an even more vital role.

Good relationships are built on trust, and having good relationships is what allows Customer Success professionals to accomplish their goals. Trust also plays a significant role in the "trusted advisor" status that everyone in Customer Success should strive to achieve. Trust is not only external, between a Customer Success professional and their client, but it's also internal, within a Customer Success department and the rest of its company.

And it's not trust alone that puts you in the hard-earned position of "trusted advisor" with your customers. Acting maturely, particularly in the face of stress, is a key element to gaining that trust. This means often having the ability to handle any situation in a professional, dignified, and responsible manner to achieve the outcome necessary.

Understanding how to build trust is complex, and executing it can be precarious, but it's extremely important to succeeding in the Customer Success world.

THIS SECTION WILL DISCUSS:

- Why building trust is central to Customer Success
- How to build trust
- What proficiency in trust looks like

What It Is

Trust is being open, honest, and reliable with both internal resources and customers. Acting maturely is the ability to handle various types of business and professional situations in a virtuous, dignified, and responsible manner, taking responsibility for the outcomes whether good or bad.

Why It's Relevant

Trust and maturity go hand in hand. Maturity plays an important role in one's ability to build trust and relationships with others.

WHY BUILDING TRUST IS CENTRAL TO CUSTOMER SUCCESS

As a Customer Success professional, your role is to bridge the worlds between your company and your clients, and help your clients achieve their goals with your company. When it comes to working with your customers, trust is actually one of the key factors which dictates if you're able to accomplish your goals.

If a customer trusts you, they'll confide in you when they have issues and trust your judgement and advice. You can propose a new application of features they haven't yet used, recommend a different approach, and make suggestions about their customer journey. If they trust you, they'll want to follow your lead. This means that you'll likely need to keep cool under pressure and be a pro at difficult conversations. If you're able to fine-tune your communication skills, particularly during more difficult times, you'll be able to build your customer's confidence in your abilities as a Customer Success Manager.

Additionally, internal trust is also a key part of having a Customer Success department that's a revenue center. Customer Success professionals need to deliver on promises to one-another and have mutual respect in order for the whole operation to run like a well-oiled machine. If your department is riddled with distrust and disrespect, it'll be difficult to accomplish big-picture items.



HOW TO BUILD TRUST

Be realistic: Being realistic with what you offer and promise can be crucial for building trust. It never looks good when you promise something and are unable to deliver it. If a customer has an expectation that's unrealistic, you can tap into your communication skills to tactfully redirect their goals, instead of just agreeing with them and not being able to deliver.

Follow up quickly: When a customer reaches out, you should do your best to respond as quickly as possible. Even if you need a little longer to resolve their issue, you can respond quickly to let them know you're on the case. This is especially important with "bad news," or things they may not want to hear. Instead of letting the communication linger, face it head-on to reach a solution quickly.

Stay cool under pressure: There are definitely going to be times when the pressure mounts and tensions will rise. It's important to stay cool under pressure and to act maturely during these times, because you're the one who is supporting your customers. You can use your emotional intelligence, assertiveness (if need-be), and persuasion skills to help smooth situations over.

Be transparent: Most of the time, customers will understand if you're having product issues, are short-staffed, or if there's a good reason why their target goal may not be met. If you're transparent and honest, you give your customers the opportunity to trust you through difficult times. Transparency also applies to good news. You can also communicate when great things happen, in order to boost trust.

In order to build trust internally within your department and company, these same tenants apply. You should always be realistic with your co-workers and only promise things that you can realistically deliver. Follow-up quickly if they have a request, even if it's an answer they may not want to hear. Stay cool under pressure and act maturely if things aren't going the way you'd hoped. Lastly, be transparent with your work and practice open communication in order to have a well-connected Customer Success team.



WHAT PROFICIENCY IN TRUST & MATURITY LOOKS LIKE

Here are some markers for success in building trust, with both clients and team members:

For Individuals: Individual Customer Success Managers who build trust will behave in accordance with expressed beliefs and commitments, will maintain high standards of personal integrity, and will demonstrate a strong commitment to organizational success. They'll also practice and advocate the respectful treatment of others, and deliver on promises to build trust and mutual respect with peers and internal/external customers.

For Senior Individual Contributors: Senior Customer Success professionals who build trust will do so with customers and direct reports through open and honest communication. They'll also demonstrate exemplary behavior at all times.

For Leaders: Leaders who build trust will share appropriate information from senior management with team members and direct reports to build trust and to encourage a transparent organization. They'll also build mutual respect, trust, and loyalty with team members by treating them fairly and leading by example, and they'll create a trusting environment with empowered individuals and teams.

Building trust with both customers and coworkers can take time, but it's well-worth the investment. Having rock solid trust comes from acting maturely, and will allow you to accomplish your goals with ease, and be part of a Customer Success department that's a successful revenue center.

TRUST

PROFICIENCY STANDARDS

Standards for proficiency at the three career stages.

Individual Contributor	Senior Individual Contributor	Leader
Behaves in accordance with expressed beliefs and commitments.	Builds trust with customers, colleagues, and direct reports through open and honest communication.	Shares appropriate information from senior management with team members and direct reports to build trust and to encourage a transparent organization.
Maintains high standards of personal integrity.	Demonstrates exemplary behavior at all times.	Builds mutual respect, trust, and loyalty with team members by treating them fairly and leading by example.
Demonstrates a strong commitment to organizational success.		Creates a trusting environment with empowered individuals and teams.
Practices and advocates the respectful treatment of others.		
Delivers on promises to build trust and mutual respect with peers and internal/external customers.		

MATURITY

PROFICIENCY STANDARDS

Standards for proficiency at the three career stages.

Individual Contributor	Senior Individual Contributor	Leader
Realistically appraises own strengths and weaknesses.	Accepts responsibility for own organizational mistakes.	Empowers employees to make decisions about their work, enabling them to complete it in the most effective/efficient way.
Gives opportunities for visibility and credit to others.	Balances corporate and customer needs and ensures that corporate needs are accounted for while attending to customer needs.	Shows a high level of maturity when dealing with organizational issues.
Accepts responsibility for own mistakes.		Makes and supports decisions that benefit the Company, even if they are unpopular or controversial.



ENTREPRENEURSHIP & STRATEGY



ENTREPRENEURSHIP & STRATEGY

Entrepreneurship and strategy refers to employing customer-oriented approaches to achieving desired outcomes, and possessing the mindset and “sense” required to understand and process unique business situations. Execution of Customer Success work really requires at least a surface-level understanding of business skills, strategy, and how to take a customer-oriented approach.

THIS SECTION WILL DISCUSS:

- What is entrepreneurship & strategy, and why is it important?
- Entrepreneurship & strategy and Customer Success.
- Ways to improve entrepreneurship & strategy.
- Ways to recognize and measure entrepreneurship & strategy.

What It Is

Customer Success work is much more effective when approached with business savvy and a customer-oriented mindset. Being able to strategize, make tough calls, and plot out ways to achieve goals takes a specific set of abilities. Equally as important is possessing at least a foundational amount of business acumen. A Customer Success professional who applies their knowledge of business metrics to their work will be much better equipped than a Customer Success professional who isn't looking at the big picture. Taking specific approaches to Customer Success work that employ entrepreneurship and strategy skills can help deliver calculated results time and again.

Why It's Relevant

While Customer Success work requires people skills and a lot of communication, knowledge of entrepreneurship and strategy will allow Customer Success professionals to take a much more business-informed approach to their work.

ENTREPRENEURSHIP, STRATEGY AND CUSTOMER SUCCESS

While it's possible to approach Customer Success from a haphazard business standpoint, you can take a much more calculated approach with just a little bit of legwork. Taking the time to learn basic business acumen, strategy, and how to take a customer-orientated approach can allow you to use time-tested techniques to enhance your Customer Success work.

Without these skills, it's more like you're "throwing things at the wall" until something sticks. Sometimes you might hit a home run, but it's going to be a lot of guesswork. The good news is that you don't need to reinvent the wheel when it comes to some of the entrepreneurship & strategy essentials, and even just learning the fundamentals of these skills can greatly improve your Customer Success efforts.

WAYS TO IMPROVE ENTREPRENEURSHIP & STRATEGY

Taking an informed approach to your Customer Success work with entrepreneurship & strategy skills can vastly improve your efforts and give you a greater chance of success. Here are some ways to improve your entrepreneurship & strategy skills:

Know your metrics: Knowing which metrics matter to your business and understanding how they are measured can help you develop your entrepreneurship and strategy skills. You'll not only hone your understanding, but you'll be able to connect the dots by seeing how certain moves impact certain metrics, and you'll understand how high-level decisions are made.

Learn from experience: Looking back at your past experiences and seeing how your decisions played out can help hone your entrepreneurship and strategy skills. You can analyze why one decision led to a certain outcome, why some decisions led to the desired conclusion, and why others didn't.

Find a mentor: Business mentors can greatly help you improve your skills in entrepreneurship and strategy. Find someone who is more senior than yourself, and who has experience in areas you wish to grow. You can have meetings with them and ask for feedback on your work, in order to develop your own skills.



BUSINESS ACUMEN

In the business landscape, there's a phrase that often gets thrown around: business acumen. Job descriptions list it as a desirable quality, and university courses proclaim to teach it to you. But what exactly is business acumen, and why is it important to Customer Success?

Business acumen means not only having a thorough understanding of how a business works, but also a deep and broad knowledge of its core components--such as finance, accounting, and technology--and using this knowledge for decision-making. Having business acumen skills in Customer Success means adopting a business perspective when assessing situations, and making decisions with the ability to understand how those decisions will impact the business internally or the customer objectives.

THIS SECTION WILL DISCUSS:

- The importance of business acumen in Customer Success
- How to amplify your business acumen skills
- How to measure success in business acumen

What It Is

Adopting a business perspective when assessing situations and making decisions with the ability to understand how decisions will impact internal business metrics or a customer achieving their objectives

Why It's Relevant

Business acumen is critical for helping customers "connect the dots" between business needs and service offerings and understanding how internal and customer-focused decisions will affect organizational business outcomes

THE IMPORTANCE OF BUSINESS ACUMEN IN CUSTOMER SUCCESS

While business acumen is vital in all industries, it is particularly important for Customer Success for two main reasons. Firstly, as a Customer Success professional, you're really helping customers "connect the dots" between the needs of their own business, and the services offered by your company. Having domain expertise of your own product, industry, and metrics is essential for bridging that gap for your customers, making poignant assessments, and guiding them to the best decisions possible.

Having business acumen skills is also important for Customer Success work for a second main reason: these skills help you understand how both internal and customer-focused decisions will impact organizational business outcomes. That's because these skills allow you to process information, and be very strategic about decisions that you make as a Customer Success professional in order to best serve your company's long-term goals.

HOW TO AMPLIFY YOUR BUSINESS ACUMEN SKILLS

It's clear that having business acumen is central to excelling in Customer Success, but it's not something Customer Success professionals are often formally trained on. If you're looking to amplify your business acumen skills, here are some ideas to get you started:

Deepen your company knowledge: Having strong business acumen skills means having a thorough and deep understanding of your company, its inner-workings, and its business model. You should essentially have domain expertise of your own company, and have a broad understanding of its goals and mission. In order to deepen your company knowledge, you can dive into areas of the business that are unfamiliar to you, and ask company leadership for insight and guidance.

Develop knowledge of metrics: Customer Success metrics play an important role in understanding everything from the overall health of a business, to the effectiveness of Customer Success efforts. It's important to not only understand universal Customer Success metrics, but know specifically which ones are most valued by your company. This will allow you to understand how your company is performing, and how certain decisions impact outcomes.

Share customer stories: Oftentimes, business acumen skills are developed on-the-job, during real-world situations. In order to expand your business acumen skills without having to experience every business scenario, set up a platform where team members can share customer stories. This might be a dedicated Slack channel, for example, where Customer Success professionals can share customer wins and struggles. This will allow you to see how other Customer Success professionals respond to situations, and what kinds of scenarios are prevalent in your organization, outside of your own accounts.





HOW TO MEASURE SUCCESS IN BUSINESS ACUMEN

Business acumen skills are important for Customer Success professionals at every career level. Here are some markers of proficiency in business acumen:

For Individuals: Individual Customer Success Managers who are proficient in business acumen will actively promote their company as a “winning team,” will keep the bigger picture in mind when addressing problems, and will work closely with customers to understand their motivation, to find mutually advantageous solutions. They’ll also possess enough subject matter expertise to help customers adopt solutions which address their objectives, and they’ll stay in-the-know about technological and market developments.

For Senior Individual Contributors: Senior Customer Success professionals who are proficient in business acumen will make and support decisions that benefit their company, even if they’re controversial. They’ll take a long-term strategic approach to finding solutions, will foresee both obstacles and opportunities, and will keep up-to-date on subject matter expertise. They’ll also understand the business of their own group within the company from both a corporate and regional perspective.

For Leaders: Leaders who are proficient in business acumen will understand the implications of key business performance indicators, such as finance. They’ll display a thorough domain knowledge of their industry, keep up-to-date on their knowledge of the company’s financial and market position, and will understand the complexities of working in a large matrix organization. Leaders will also anticipate obstacles and work to continuously improve the company’s capacity to deliver quality results, and will assume accountability for managing the company’s assets.

Business acumen skills allow a Customer Success professional to excel in critical thinking and analytical reasoning, as it pertains to their own business and work. By sharpening your business acumen, you’ll not only be able to make decisions that better serve your company, but you’ll also be well-equipped to help your customers reach their ultimate goals.

BUSINESS ACUMEN

PROFICIENCY STANDARDS

Standards for proficiency at the three career stages.

Individual Contributor	Senior Individual Contributor	Leader
Actively promotes the Company as a "winning team."	Makes and supports decisions that benefit the Company, even if they are unpopular or controversial.	Understands the meaning and implications of key financial and other business performance indicators.
Possesses enough subject matter expertise to be able to help customers adapt and adopt solutions to address their objectives.	Takes a long-term strategic approach to finding solutions for the company and its customers.	Displays a thorough knowledge of the industry, its markets, customers, and competitive environment.
Keeps the bigger picture in mind when responding to problems, always acting in the best interests of the company.	Foresees obstacles and opportunities in customer business needs and objectives that can be addressed with company provided solutions.	Keeps up-to-date on own knowledge of the company's financial and market position so as to make rapid, informed decisions.
Works closely with internal and/or external customers to understand their motivation and find mutually advantageous solutions to their problems.	Keeps up-to-date on subject matter expertise and functional aspects of company solutions in order to make thoughtful suggestions to address customer needs.	Understands the complexities of working in a large matrix organization, using networking to get things done in a timely manner.
Stays abreast of technological and market developments.	Understands the business of own unit or group within the Company from both a corporate and a regional perspective.	Anticipates obstacles, barriers or gaps, and works to continuously improve the company's capacity to deliver quality results.
		Understands the financial and business implications of decisions and assumes accountability for prudent management of the company assets.



STRATEGY AND DIRECTION

Just as you wouldn't want to be up a creek without a paddle, you don't want to be in a Customer Success role without the ability to strategize. Strategizing means being able to understand how organizational and customer goals are achieved, and developing a rock-solid plan of execution in order to get there. Strategizing requires foresight, strategic planning, critical thinking, and thoughtfulness, along with business acumen.

You might think that only leaders are responsible for strategizing in Customer Success, but that's not necessarily the case. While it is true that leaders should absolutely be strategizing and directing their team, it's crucial for Customer Success professionals at every career level to be able to strategize in order to achieve their goals.

THIS SECTION WILL DISCUSS:

- Why all Customer Success professionals need strategizing abilities
- How to improve your strategizing abilities
- How to measure success in strategizing

What It Is

Defines how organizational or customer goals and objectives will be achieved and aligns all involved parties to reach goals and objectives.

Why It's Relevant

Being able to understand and define how organizational or customer goals and objectives are achieved is key to developing an execution plan.

WHY ALL CUSTOMER SUCCESS PROFESSIONALS NEED STRATEGIZING ABILITIES

Customer Success is a very results-oriented profession, with actions often being driven by goals. These goals can be organizational, which means they're connected to business objectives, or they can be customer-oriented, meaning these goals pertain to where your clients want to be. When you have goals on the horizon, the best way to achieve them is by being able to develop an execution plan. Instead of throwing everything at the wall, hoping something sticks, Customer Success professionals should be able to identify specific steps they should take, in order to reach those goals, by strategizing.

Strategizing doesn't need to just come from the top down. Leadership is responsible for strategizing, outlining long-term goals, and delegating responsibilities in order to get there. But if every Customer Success professional sharpens their strategizing abilities, then achieving goals can be a group effort, with every team member taking thoughtful steps, conducting useful critical analysis, and executing project management like a pro.

HOW TO IMPROVE YOUR STRATEGIZING ABILITIES

Every Customer Success professional can benefit from improving their strategizing abilities and strategic thinking skills. Here are some ideas to get you started:

Observe trends: Customer Success trends can actually be very telling, and will help you develop your strategizing abilities. In your day-to-day, try to take note of any problems which occur, especially if they tend to recur, and pay attention to other obstacles that come up for both your clients and your coworkers. Also observe how these dilemmas are resolved, which techniques work, and which techniques don't. This will allow you to be able to predict and avoid conflicts in the future, and develop plans to achieve goals.

Create structure: Successful strategizing means outlining steps, goals, obstacles, and outcomes. In order to get to a place where you're successfully strategizing, you need to make sure you're creating structure around these components of your work day. Make lists which outline your main points for a meeting, write goals with deadlines on a calendar, and follow-up conversations with a detailed email, outlining what was discussed and next steps. Creating structure will help you see patterns, stay organized, and successfully strategize.

Ask a lot of questions: Having a thorough understanding of the situation you're in and where you're expected to go is central to being able to strategize. Ask your leaders questions about the meeting, repeat goals and initiatives back to your customers to confirm your understanding of them, and always practice active listening. By asking questions, you'll learn a lot of information which is useful for strategizing.

Expect and dissect obstacles: In Customer Success, you're bound to face obstacles when trying to achieve your goals. Instead of letting these obstacles throw you off balance, expect that they're going to arise, and see them as an opportunity for learning. Dissect the scenario, what led to it, and what the outcome was like. These times of conflict can be a useful teaching tool, in order to help you strengthen your strategizing abilities.



HOW TO MEASURE SUCCESS IN STRATEGIZING

Here's how Customer Success professionals at every skill level can measure success in strategizing:

For Individuals: Individual Customer Success Managers who are proficient in strategizing will be able to link business objectives to their own unit objectives, in order to maximize balance and productivity. They'll actively seek out and apply best practices, both internally and externally. They'll also understand the "bigger picture" by envisioning their own role in long-term objectives, and exhibit a dynamic, proactive, and responsive attitude towards their company.

For Senior Individual Contributors: Senior Customer Success professionals who are proficient in strategizing will meet challenges head on, to ensure the best outcomes for the customer and their company, and they'll also provide clear direction and priorities to other team members.

For Leaders: Leaders who are proficient in strategizing will see that broad strategies are translated into clear and specific objectives, and they'll align the organization and resources to strategic priorities. They'll also take initiative to help team members and direct reports understand how their work fits into the bigger picture, will foster the development of a common vision, and clarify roles and responsibilities. Lastly, leaders will understand the financial and business implications of decisions, and assume accountability for prudent management of company finances.

Honing your strategizing abilities will help you become an all-around stronger Customer Success professional. By understanding the importance of these skills, you'll be able to lead your customers to their goals with ease, and help your business reach its desired milestones.

STRATEGY AND DIRECTION

PROFICIENCY STANDARDS

Standards for proficiency at the three career stages.

Individual Contributor	Senior Individual Contributor	Leader
Links business objectives to own unit objectives to maximize balance and productivity.	Meets challenges head on to ensure the best outcomes for the customer and the company.	Sees that broad strategies are translated into clear and specific objectives.
Actively seeks out and applies both internal and external "best practices."	Provides clear direction and priorities.	Aligns the organization and resources to strategic priorities.
Understands the "bigger picture." always envisioning own role in the context of the Company's long-term objectives and strategic goals.		Takes initiative to help team members and direct reports understand how their work fits into the bigger picture.
Exhibits a dynamic, proactive, responsive, dedicated attitude towards the company and the "company solution."		Fosters the development of a common vision.
		Clarifies roles and responsibilities.
		Understands the financial and business implications of decisions and assumes accountability for prudent management of the company assets.



CUSTOMER ORIENTATION

Customer Success teams have grown to become central in the overall success of a business because they play a big role in customer retention and overall profitability. Customer Success teams are able to best contribute to retention by not only anticipating customer needs, but also aligning reactions with the goals of the entire Customer Success department. We call this customer orientation, or the ability to respond to a customer's needs in the moment.

Having customer orientation requires you to have expertise in many skill areas such as emotional intelligence, project management, and business acumen. Being able to predict client needs can be challenging, because short of having a crystal ball, predicting the future may seem impossible. But with the right toolkit in your Customer Success arsenal, you'll be able to operate from a customer-oriented mindset, and best serve both your customers and your workplace.

THIS SECTION WILL DISCUSS:

- How a customer-oriented mindset is central to Customer Success
- How you can learn to anticipate client needs
- How to measure success in customer orientation

What It Is

Responding to customer needs in a manner that provides added value and is focused on Customer Success and satisfaction.

Why It's Relevant

To deliver Customer Success, individuals need to be oriented and biased towards serving customer needs.

HOW A CUSTOMER-ORIENTED MINDSET IS CENTRAL TO CUSTOMER SUCCESS

As a Customer Success professional, your main goal is to aid the customer on their journey, while increasing revenue for your company. It's possible to fulfill this purpose while operating from a "reactive" mode, where you're putting out fires and filling requests. But if you want to maximize your effectiveness and profitability as a Customer Success professional, you really should be approaching this work from a proactive standpoint, or from a customer-oriented mindset. By operating from this mindset, you'll be stepping into the shoes of your customers and anticipating what they need, and making sure that what you're delivering is in alignment with your own organization's goals.

A healthy customer-oriented environment in the workplace means taking the time to understand your clients and developing domain expertise, but also having a thorough understanding of your own organization and its offerings, so you know what's within your company's capabilities and goals. While operating from this mindset might mean occasionally going the extra mile, it's important to note that having a healthy customer-oriented environment does not mean promising things that are unrealistic, far-fetched, or anticipating scenarios that are completely out of left field.

Operating from this mindset can ultimately ensure that your entire Customer Success department is revenue generating, because it will be able to best-serve its primary function of increasing retention.



HOW YOU CAN LEARN TO ANTICIPATE CLIENT NEEDS

Operating from a mindset of customer orientation can take practice, as can learning to anticipate client needs. Here are some ways you can hone your customer orientation skills:

Take advantage of customer mapping: Customer mapping, or laying out your customer journey, can be very useful in learning to anticipate client needs. As a Customer Success professional, you likely already practice customer mapping. To use customer mapping to aid in anticipating client needs, you can refer to upcoming goals and stages, to see how you can best help your customer get to those points.

Look for patterns: Within individual customer accounts, and within your Customer Success department as a whole, there are likely patterns which can be very telling. Identifying overarching data patterns, common issues that arise for Customer Success Managers, or a repeat issue one particular customer is having can help you anticipate if something is likely to occur again, and how you can best prepare for it.

Practice open communication: Effective open communication can be a huge asset in being able to anticipate customer needs. This means that there's a free-flow of information within your Customer Success team, and also between customers. Instead of working heads-down, waiting for problems to arise, you'll learn much more about objectives, best-practices, and results by practicing open communication.



HOW TO MEASURE SUCCESS IN CUSTOMER ORIENTATION

While customer orientation is central to having a Customer Success team that's high performing and revenue generating, succeeding in this area looks very different for professionals at different career stages.

For Individuals: Individual Customer Success Managers who are proficient in customer orientation will build strong relationships with customers by delivering on promises and by going the extra mile (when necessary) to meet their expectations. They'll also probe customers to understand their business and its real requirements, will escalate problems to the proper level at the right time, and will seek feedback from customers. They'll find new ways to add value by helping the team provide creative business solutions.

For Senior Individual Contributors: Senior Customer Success professionals who are proficient in customer orientation will anticipate customer needs to add value to their business. They'll also respond with urgency to customer needs, and delegate the resolution of problems to the appropriate level.

For Leaders: Leaders who are proficient in customer orientation will focus effort, resources, and people on delivering quality solutions that meet customer needs. They'll also communicate a customer-focused vision to all company employees and stakeholders.

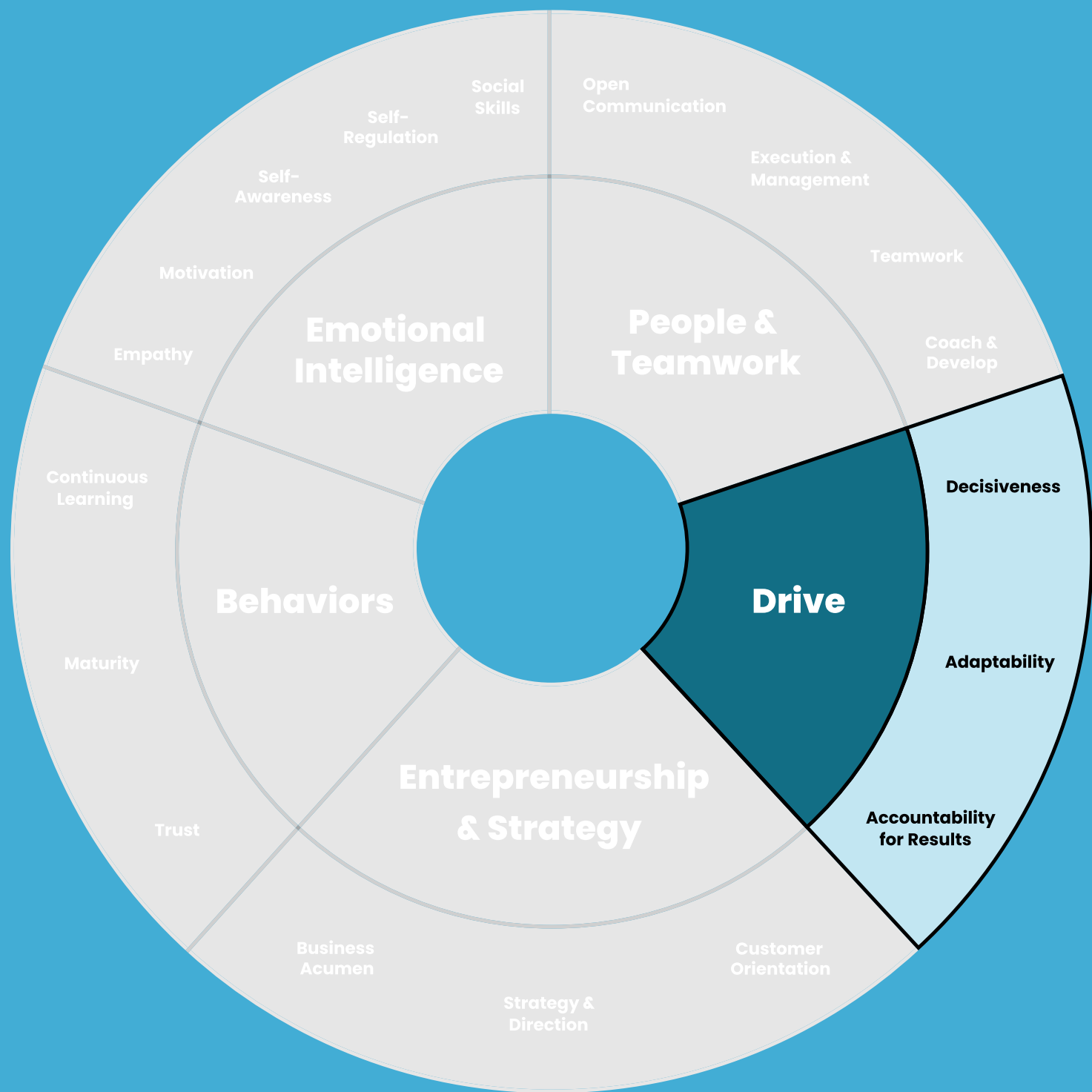
Being able to predict customer needs may be one of the most crucial factors which determines if your Customer Success department is high performing. By sharpening these skills and operating from this mindset, you'll be able to anticipate the needs of your customers, and achieve your goals as a Customer Success team.

CUSTOMER ORIENTATION

PROFICIENCY STANDARDS

Standards for proficiency at the three career stages.

Individual Contributor	Senior Individual Contributor	Leader
Builds strong relationships with internal and/or external customers by delivering on promises and going the extra mile, when necessary, to meet their expectations.	Anticipates customer needs to add value to their business.	Focuses effort, resources, people, etc., on delivering quality solutions that meet customer needs.
Probes internal and/or external customers to understand their business and identify their real (underlying) requirements.	Responds with urgency to customer needs, delegating the resolution of problems to the appropriate level.	Communicates a customer-focused vision to all Company employees and stakeholders.
Escalates problems to the right level at the right time to ensure the best possible response to customer problems.		
Seeks feedback from customers.		
Finds new ways to add value by helping the team provide creative business solutions.		



DRIVE



DRIVE

Drive refers to having the ability and desire to achieve and own results whether good or bad. Customer Success professionals are responsible for their own autonomy, and need to be self-motivated to hit their goals and deliver results. They often have a lot of responsibility on their plates, and, at the end of the day, they're the sole person accountable for seeing actions through to completion.

THIS SECTION WILL DISCUSS:

- What is drive, and why is it important?
- Drive and Customer Success.
- Ways to improve drive.
- Ways to recognize and measure drive.

What It Is

Drive refers to skills which allow you to be self-motivated to achieve and own results. These two distinct branches of drive are important to note, because they're unique, but equally as vital to Customer Success work. Customer Success professionals need to have the ability and desire to achieve results on their own accord, because there are many things they're solely responsible for. If a Customer Success professional doesn't have drive, their goals will likely never be achieved. Secondly, Customer Success professionals need to take ownership over their results. As this is a results-driven field, it's important for Customer Success professionals to acknowledge and own the results of their work, whether those results are positive or negative.

Why It's Relevant

Self-motivation and autonomy are key components to Customer Success work, and drive is required for Customer Success professionals to achieve their goals and metrics.



DRIVE AND CUSTOMER SUCCESS

Many tasks in Customer Success require independent work, without direction and without someone sitting over your shoulder. This means that Customer Success professionals need to be able to accomplish these tasks on their own, and take responsibility for whatever the outcomes are.

A Customer Success professional who has drive will be able to use their self-motivation to complete tasks, and will feel energized and eager to achieve results on their own accord. A Customer Success professional who lacks drive will likely feel less motivated to complete their work, and will probably feel little inspiration or excitement in their day-to-day life. Drive will also lead Customer Success professionals to take ownership for the outcomes of these actions, by holding themselves accountable and learning from these outcomes.



WAYS TO IMPROVE DRIVE

It's up to each Customer Success professional to fuel their drive to achieve and own results. Here are some ideas you can use to improve your drive:

Set achievable goals: A great way to stay motivated to achieve and own results is to set goals that are achievable. If you spend months and months working towards one big goal, you may start to lose steam. But if you break down that big goal into several smaller milestones, you'll likely feel more motivated to hit each marker, and can learn from your progress as you go.

Take breaks: Burnout can be the antithesis of drive, so in order to keep your drive up, don't consistently overwork yourself. If you feel yourself starting to burn out, find ways to take breaks, reduce your stress, and set manageable goals.

Find learning opportunities: With ownership comes the opportunity to learn. When you complete a task and take ownership for the outcome, use that experience as an opportunity for reflection. You can study what went right, what went wrong, and how you can improve for next time.



DECISIVENESS

Decision-making can often be a massive source of stress for people, and indecisiveness can be a big consumer of time and energy. But when we get stuck in a place where we're unable to make up our minds, this indecisiveness can become much more than stress and can evolve into a real hindrance to getting things done. This is especially true in the Customer Success landscape, where decisiveness, leadership, problem solving, and confidence are all vital. Being a decisive Customer Success professional allows you to use available data, along with your perspective and analysis, to make timely decisions that have impacts for both your clients and your company.

THIS SECTION WILL DISCUSS:

- Why decisiveness is important in Customer Success
- How you can become more decisive
- How to measure success in decisiveness

What It Is

The ability to make a decision in a timely manner by bringing together a wide range of considerations and perspectives to issues, ensuring that thorough analysis is part of the decision-making process.

Why It's Relevant

Being able to make thoughtful decisions will exude a level of confidence internally and within your customer organization.

HOW A CUSTOMER-ORIENTED MINDSET IS CENTRAL TO CUSTOMER SUCCESS

We already know that decisiveness is central to overall workplace success, and that it's tied to both credibility and leadership. When we're talking specifically about Customer Success, decisiveness refers to the ability to make decisions in a timely manner by bringing together a wide range of considerations and perspective to issues, ensuring that thorough analysis is part of the decision-making process. While decisiveness plays a central role in excelling in Customer Success, indecisiveness can leave you stuck at roadblocks.

As a Customer Success professional, decisiveness goes hand-in-hand with accountability, meaning you need to stand behind your decisions with confidence, and accept the results of those decisions, whether they're positive or negative. When we make decisions or act on our decisiveness, we need to embrace the fact that we're accountable for those decisions and their outcomes.

There's another key component to decisiveness, and that's timeliness. As Customer Success professionals, we're often in a position of needing to act quickly or striking while the iron is hot. Spending too much time mulling over a decision might mean that we miss an opportunity, for our clients or our own company. Being decisive means not only making decisions and being accountable for them, but doing so in a timely manner.



HOW YOU CAN BECOME MORE DECISIVE

Becoming more decisive means growing your confidence, thinking independently, and becoming a pro at problem solving on the fly. Here are some steps you can take in order to become more decisive when it comes to Customer Success:

Practice with small decisions: If you're looking to build up your ability to be decisive, a great place to start is with small decisions. This can mean consciously practicing both in the workplace or outside of it. For example, if something is under your authority at work, and you're tempted to ask a senior team member for their opinion, try making the decision on your own. Or maybe try making a quicker decision about which sandwich to order for lunch, instead of going back and forth all morning. Making decisions and sticking by them takes practice, and you can build trust in yourself with the little things.

Find a mentor: Finding a decision-making mentor can help you become more decisive. This type of mentor might be someone who is familiar with your work, or even at your organization, but who isn't directly involved in the decision-making process. Maybe it's someone in a lateral position from you, or a senior leader who is not involved in your account. Bouncing your ideas off of a knowledgeable mentor can help you reflect on your options, and understand how others might process the situation.



Build up your business acumen: Being savvy in business can help you vastly increase your knowledge about a scenario and ultimately lead you to trust your own judgement. Business acumen in Customer Success means having broad and deep knowledge about the core components of your business and product, having domain expertise, and accurately predicting how decisions will impact outcomes. Having all of these tools in your arsenal will vastly improve your decisiveness.

Revisit your decisions and outcomes: In order to best build your confidence and problem solving abilities, you should spend time revisiting past decisions and outcomes. You can trace back a particular leg of a customer journey, and see how one decision led to a specific result. This is important to do for both positive and negative outcomes, and can also help you strengthen your accountability. Understanding the impacts of your decisions in real-world scenarios can help you make smarter decisions going forward and lead you to trust your own judgement.



HOW TO MEASURE SUCCESS IN DECISIVENESS

Being able to make Customer Success decisions in a timely manner takes practice, confidence, and experience. Here are some markers of success in decisiveness for Customer Success professionals at different career stages:

For Individuals: Individual Customer Success Managers who are decisive will make decisions independently and work without constant supervision, and they'll ensure that all of the important facts have been considered before making decisions. They'll also think problems through logically, present themselves in a confident manner, and state confidence in their own judgement and ability.

For Senior Individual Contributors: A senior Customer Success professional who is decisive will balance pros and cons of alternative solutions before making a fact-based decision, will guide others to make logistical and well-thought-out decisions, and will separate facts from perceptions. They'll also define issues clearly, despite incomplete or ambiguous information, and make sound decisions in a timely manner.

For Leaders: Leaders who are decisive will make tough and pragmatic decisions when necessary and will apply broad knowledge and experience when addressing complex issues. They'll also reach mutually satisfying decisions with team members to ensure that a single voice is presented to the customer, and they'll know how to get things done in a complex, multicultural organization.


Indecisiveness at every career level can be something that holds back a Customer Success team from success. If everyone on the team is confident, makes timely decisions with ease, and is accountable, the whole operation can run like a well-oiled and profitable machine.

DECISIVENESS

PROFICIENCY STANDARDS

Standards for proficiency at the three career stages.

Individual Contributor	Senior Individual Contributor	Leader
Makes decisions independently, working without constant supervision.	Balances pros and cons of alternative solutions prior to making a fact-based decision.	Makes tough and pragmatic decisions when necessary.
Ensures that all important facts have been considered before making decisions.	Guides others to make logical, well-thought-out decisions.	Applies broad knowledge and experience when addressing complex issues.
Thinks problems through logically, mapping the process until a solution is found.	Separates facts from perceptions.	Reaches mutually satisfying decisions with team members to ensure that a single voice is presented to the (internal and/or external) customer.
Presents self in a confident and impressive manner.	Defines issues clearly despite incomplete or ambiguous information.	Knows how to get things done in a complex, multi-cultural organization.
States confidence in own judgment or ability.	Makes sound decisions in a timely manner.	



ACCOUNTABILITY FOR RESULTS

If you cringe when you hear the phrase “being held accountable for your actions,” you’re definitely not alone. Especially in the workplace, the word “accountability” can often have a negative connotation.

Most of us tend to have experience with top-down accountability, when leaders try to enforce accountability in an almost parental-like way, with strict rules and potential consequences. While leadership is certainly responsible for making sure employees are accountable for the outcomes of their decisions, accountability is most successful when individuals are proactive about owning the results of their work. When this is the case, employees will feel self-motivated to reach goals and uphold the values of a company.

Customer Success professionals have a lot of responsibility on their shoulders, because the decisions they make directly impact many people, including customers and their own team members. The results of these decisions might be positive or negative, and either way, Customer Success professionals need to not only stand behind their decisions, but embrace accountability and own the results of their decisions.

THIS SECTION WILL DISCUSS:

- Why accountability for results is relevant to Customer Success
- How to improve your workplace accountability
- How to measure proficiency in accountability

What It Is

Stands behind decisions and accepts accountability and the results of those decisions, “owning” the results whether positive or negative.

Why It’s Relevant

With decision making comes accountability for making those decisions.

WHY ACCOUNTABILITY FOR RESULTS IS RELEVANT TO CUSTOMER SUCCESS

While there are many departments and components to a thriving business, the reality is that Customer Success professionals have a bulk of the responsibility for a company's success resting on their shoulders. The decisions a Customer Success professional makes in their workday can have widespread impact, which translates to very real implications for both customers and other team members. Customer Success involves a ton of problem solving, mapping, navigating, and making tough choices. Sometimes, these choices are going to yield positive results, and everyone will be happy. But of course, this isn't always the case, and oftentimes Customer Success choices don't pan out the way we hope.

It's crucial for Customer Success professionals of all career levels to be accountable for their decisions, and own the results of them. A lack of accountability means that a Customer Success professional might not deliver on expectations, will shy away from solving problems, and will not take ownership of challenges. If an entire Customer Success team acts in this way, it's going to be very difficult to have a department that's a revenue center.

HOW TO IMPROVE YOUR WORKPLACE ACCOUNTABILITY

Workplace accountability can be difficult, because it requires self-motivation, and it's also not always the most comfortable thing to embrace, particularly when results are negative. Here are some ways you can work to improve your Customer Success workplace accountability:

Ask for or provide clarity: Accountability can be difficult when someone doesn't actually know what they're accountable for. If you're a leader, you need to set clear details about roles and ownership of results. If you're a Customer Success Manager or senior leadership, you need to ask for clarification about what you're accountable for, if it's not provided to you.

Set measurable goals: Customer Success professionals who have measurable goals will need to have some sense of ownership for their decisions, because these decisions will impact if they reach their goals. Leaders can help employees come up with their own goals, and employees can turn to leaders for assistance reaching their goals. This will also promote a dialogue, which is excellent for accountability.

Create a forum for updates: Regular discussions with status updates on clients, metrics, and goals can be a great way at fostering connectivity as well as promoting accountability. If the team is meeting weekly, and sharing updates on their clients and projects, then having ownership of results will be expected.

Evaluate progress: Ownership doesn't only have to happen at the "result" stage, but should also be happening during the arc of a task. There can be check-ins with leadership, where team members can share performance updates. Progress evaluations are also a great opportunity for leadership to provide resources to help team members reach their goals.



HOW TO MEASURE PROFICIENCY IN ACCOUNTABILITY

Building proficiency in accountability might take some time, and some department-wide teamwork. Here are some indicators for proficiency for Customer Success professionals at every career stage:

For Individuals: Individual Customer Success Managers who are proficient in accountability will deliver on commitments in a timely manner, will persist in the face of obstacles, and will get things done in a complex organization. They'll also prioritize their own work and make choices between "urgent" and "important" tasks, while accepting responsibility for outcomes.

For Senior Individual Contributors: Senior Customer Success professionals who are proficient in accountability will provide clear direction and priorities, will take the lead to resolve problems, and will take ownership for challenging projects. They'll also guide peers and customers to make logical, well-thought-out decisions, and will take responsibility for both positive and negative outcomes.

For Leaders: Leaders who are proficient in accountability will get results that have a clear and positive impact on business performance and profitability, and will establish challenging goals and performance standards. They'll also assume fiscal responsibility by always acting in the best interests of the company, its shareholders, and its employees.

Decision-making is intrinsic to Customer Success, which is why accountability is so crucial to the field. When everyone on a Customer Success team is self-motivated to take accountability for results, you'll have a department full of employees who can handle big responsibility and critical outcomes, and who take ownership for their actions.

ACCOUNTABILITY FOR RESULTS

PROFICIENCY STANDARDS

Standards for proficiency at the three career stages.

Individual Contributor	Senior Individual Contributor	Leader
Delivers on commitments in a timely manner.	Provides clear direction and priorities.	Gets results that have a clear and positive impact on business performance and profitability.
Prioritizes own work, making choices between “urgent” and “important” and accepting responsibility for the outcomes.	Takes the lead to resolve problems.	Assumes fiscal responsibility by always acting in the best interests of the company, its shareholders, and its employees.
Persists in the face of obstacles.	Takes ownership for challenging projects.	Establishes challenging goals and performance standards.
Gets things done in a complex, multi-cultural organization.	Guides peers and customers to make logical, well-thought-out decisions.	
Stays current in own area of expertise while keeping aware of the “bigger picture.”	Takes responsibility for both positive and negative results.	



ADAPTABILITY

Customer Success may be one of the most dynamic and unpredictable fields in the business landscape today. Customer and business needs, goals, and challenges change constantly, and you really never know what the day is going to bring. In order to best combat this unpredictability, Customer Success professionals need to be experts in both adaptability and resilience. In the day-to-day of a Customer Success professional, challenges are going to arise, you're going to encounter brand new situations, and some scenarios may not play out like you hope. Adaptability and resilience can help guide you through all of these situations, and ultimately lead you to achieve your Customer Success goals.

THIS SECTION WILL DISCUSS:

- Why adaptability and resilience are central to Customer Success
- How to boost your adaptability and resilience
- How to measure success in adaptability and resilience

What It Is

The ability to work effectively in a variety of situations with various individuals and personalities, both internally or externally.

Why It's Relevant

In customer-facing roles, individuals will deal with a wide variety of personalities. This underscores the importance of adapting one's approach and communication style to the audience.

WHY ADAPTABILITY & RESILIENCE ARE CENTRAL TO CUSTOMER SUCCESS

In general, adaptability and resilience are central to excelling in any business today. Adaptability in the workplace is seen as being a major competitive advantage, because of how much risk and instability is inherent in the workforce. Meanwhile, resilience can be key to combating intense work stress, and can help employees steadily navigate through potential work burnout.

When we're talking about Customer Success, adaptability might as well be listed as part of the job description. Being able to work effectively in a variety of situations with various individuals and personalities is something that is necessary in the day-to-day of a Customer Success professional. This is especially true in customer-facing roles, where Customer Success professionals will deal with a variety of personalities. The need to adapt one's approach and communication style can be critical to producing desired outcomes.

When we're talking about Customer Success and resilience, it's important to note that due to its unpredictable nature, Customer Success work can pose relentless challenges. You might find yourself in a brand new situation, with a big hurdle at hand, and have to deal with a difficult customer, all at the same time. Having resilience means that you're able to weather these storms, and that you're able to bounce back quickly after difficult situations.



HOW TO BOOST YOUR ADAPTABILITY AND RESILIENCE

Adaptability and resilience may seem like inherent skills, but in fact, they are learned abilities, which you can work to develop. Here are some ways to boost your adaptability and resilience:

Be comfortable with multiple solutions: When you're brainstorming Customer Success ideas, coming up with multiple solutions can help you become comfortable with being both adaptable and resilient. Here's a scenario: you spend a ton of time and energy coming up with a new customer journey map, and when you share it with the customer, they're not happy about certain parts of it. If you have other ideas on the backburner, you'll be ready to deploy other ideas, instead of simply feeling dejected. Being mentally prepared to pivot can help you become an expert in adaptability and resilience.

Practice mindfulness: Mindfulness practices can be great for things like reducing stress, but studies actually show that mindfulness is directly related to increased resilience. This suggests that acts of mindfulness, such as being present, putting down your cell phone, and focusing one one task at a time can help you become more resilient overall, including in the workplace.



Put down your work: Putting down work for the day can be challenging, especially in the work-from-home era. But detaching from work everyday is an important part of cultivating your resilience and adaptability, especially if you're facing stress and challenges. Taking time to unwind, decompress, and give your brain a break from problem-solving can help you feel your best. Plus, after a good break, you'll come back to work with fresh eyes, ready to tackle these scenarios.

Seek out new experiences: One of the best ways to practice adaptability is to put yourself in new scenarios and situations. Oftentimes, newness can feel uncomfortable, and we might shy away from a new situation, if we can pick something we're familiar with. But being in a new situation forces us to think on our feet, figure out how to succeed in our new environment, and ultimately become comfortable with adaptability.



HOW TO MEASURE SUCCESS IN ADAPTABILITY & RESILIENCE

Building adaptability and resilience in Customer Success might seem challenging, but these skills can help you achieve your Customer Success goals. Here are some markers of success in adaptability and resilience for Customer Success professionals at different career stages:

For Individuals: Individual Customer Success Managers who are adaptable and resilient will adapt easily to new ways to doing things, and thrive on change and ambiguity. They'll also adapt their own behavior or style to respect the differences of others, including cultural and language differences, and will adapt their style and approach to match the needs of different individuals and teams. Lastly, they'll work constructively under stress and pressure.

For Senior Individual Contributors: Senior Customer Success professionals who are adaptable and resilient will work with continually changing time-frames without becoming defensive and without making excuses. They'll take on a global perspective, consulting with colleagues in other locations to share global solutions. They'll also promote a working environment that integrates the cultures and business practices of all stakeholders.

For Leaders: Leaders who are adaptable and resilient will be willing and able to adjust to multiple demands, shifting priorities, ambiguity, and rapid change. They'll maintain a stable team environment under pressure and/or opposition, and will show resilience in the face of constraints or adversity. Lastly, they'll celebrate differences/diversity by recognizing the unique contribution of each employee and perspectives they bring to the team.

Having both adaptability and resilience can be something that makes or breaks Customer Success outcomes, and which dictates the ability of a Customer Success team to become a revenue center. Honing your adaptability and resilience in Customer Success will allow you to be prepared for any scenario, help you stay determined, and lead you to get back up on the horse when things challenges arise.

ADAPTABILITY

PROFICIENCY STANDARDS

Standards for proficiency at the three career stages.

Individual Contributor	Senior Individual Contributor	Leader
Adapts easily to new ways of doing things, thriving on change and ambiguity.	Works with continually changing time-frames without becoming defensive and making excuses.	Willing and able to adjust to multiple demands, shifting priorities, ambiguity, and rapid change.
Understands the implications of working across different time zones/geographical areas, ensuring that everyone's needs are considered and respected.	Takes a global perspective, consulting with colleagues in other locations, where appropriate, to share global solutions.	Maintains a stable team environment under pressure and/or opposition.
Adapts own behavior or style to respect cultural, language, or other individual differences.	Promotes a working environment that integrates the cultures and business practices of all stakeholders.	Shows resilience in the face of constraints or adversity.
Adapts style and approach to match the needs of different individuals and teams.		Celebrates differences/diversity by recognizing the unique contribution of each employee and perspectives they bring to the team.
Works constructively under stress and pressure.		

CONCLUSION

These days, change in the marketplace is happening faster than traditional processes and business models can keep up with. These rapid changes are having a monumental impact on the ways people work and organizations do business.

As Customer Success leaders look to keep pace and enhance the performance of their department to increase customer satisfaction and ultimately revenue, they most often focus on process improvements and technology, and overlook the most important aspect: their team members.

People are the foundation of Customer Success programs' success. While this means there is great potential to set ambitious goals and net huge improvements, it also means that people could be what's actually holding your Customer Success team back.

If the people on your Customer Success team don't possess the core disciplines and skills necessary to excel in this field, all of the process improvement efforts and expensive technology implementations are likely to fall short of driving real advancements.

In a recent study conducted by TalentLMS, Workable and Training Journal, only 35% of employers have an upskilling/reskilling program in place, though 91% acknowledge that training boosts productivity. Training programs give employees and teams the direct ability to stay on top of the changing demands, and fill critical skill gaps.

The good news is that all of the skills required by a competent Customer Success professional in today's quickly-evolving marketplace can be learned. By training employees, Customer Success departments can increase performance without relying on external hiring or depending on expensive technology fixes that flounder without the right skills in place.

By using a competency-based approach to professional development, you can identify skill gaps and then formulate a plan to establish the top-notch Customer Success skills needed to be successful.

FILLING THE SKILL GAPS

At SuccessCOACHING, we've reinvented the Customer Success training experience to make it accessible, effective and actionable. We offer training, resources and certification programs that support Customer Success professionals and Customer Success teams at every stage of maturity.

To learn more about training and certification programs for Customer Success Managers, aspiring Customer Success Managers and Customer Success teams, visit successcoaching.co.



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