



The 10 simple* traits of an awesome CSM

“We see our customers as invited guests to a party, and we are the hosts. It’s our job every day to make every important aspect of the customer experience a little bit better.” - Jeff Bezos

At the end of 2017, the professional networking site LinkedIn dove into its deep database of user information to evaluate the talent landscape in the U.S. They looked at data from both 2012 and 2017 to see what roles had grown the most in demand during that time and came up with a list of 20 such careers. At the top of the list of fastest-growing jobs was “machine learning engineer,” the ranks of which expanded nearly tenfold during the five-year window. Also in the top five were “data scientist,” “sales development representative,” “big data developer,” and — our favorite — “customer success manager.”

Many of the jobs on the list didn’t even exist five years ago. Others, like customer success manager (CSM), did exist but only in relatively small pockets in niche markets. As the CSM career path has evolved and seen exponential growth, recruiters and HR professionals have had to play catch-up and get creative to source new talent. At the same time, C-level decisionmakers in operations, sales, service, education, finance and more have been working to understand the depth and breadth of what Customer Success (CS) can mean to their businesses. The target is moving so quickly, it’s been difficult for these leaders to (1) identify CS best practices to lay out the best strategic vision and most productive staffing hierarchy;(2) nail down the CSM role requirements and identify the traits that define a great one and (3) find professionals to fill the talent gap.

As a discipline, CS is only going to grow. Its strategic relevance and proven impact on business opportunity and growth has been well established. The bigger question is how efficiently businesses can integrate core CS principles into their operations. In our white paper, “Building a Business Case for More Customer Success Resources,” we discussed the power of outsourcing to solve all three of those growth obstacles. Here’s an excerpt:

Outsourcing ensures access to a larger pool of talent that is familiar with CS best practices — a key benefit given today’s tight labor market. This means that you have qualified talent mapping the customer journey and managing the accounts — uncovering opportunities, converting customers into ambassadors and making your business more agile. Additionally, you benefit from lower labor costs and increased revenue.

Given all these factors around talent demand and availability, CS leadership needs to be realistic about the challenges they face when implementing strategic resource investments. By contrast, overburdening your own people and systems leads to burnedout employees and equipment and process meltdowns. Cutting corners almost always comes back to haunt in the long run, if not sooner. If you hire your own team, you need to be aware of the ratio of customer accounts to CSMs. According to Gainsight, “if your CSMs are spread too thin, there will be less defense against churn and issues can slip through the cracks.”

At ESG, we’ve done the heavy lifting of understanding the nature of the CSM role and creating clear and practical best practices for it. We’ve even developed the role of Virtual Customer Success Managers (vCSMs), trained professionals who can bring a passion to engage with customers and partners, help them better understand and utilize the full capabilities and features of your products, and help your business achieve incredible outcomes. Over the past several years, we’ve interviewed hundreds of candidates and have developed a pool of talented professionals who possess the key attributes that define a successful CSM.

It’s a very specific but in-demand expertise — helping businesses get access to really qualified CS talent like that without the hiring headaches or the budget risk. More than just a job description, we know the innate character and personality characteristics of the ideal CSM, and we require all of our vCSMs to embrace them.

A few weeks ago, we saw a terrific presentation at Gainsight Pulse by Jamey Jeff of Costal Cloud, Sanders Slavens of IBM and Lorna Henri of App Annie. We built on their insights and added our own flavor. Here are the top 10 traits we look for in an awesome CSM:

#10. They anticipate customer needs and bring advice

Awesome CSMs lead your customers to the outcomes they (and you) desire. It’s not a reactive “I hope they get there” mentality, and it’s not a dialogue that should be led by your customer. It’s a proactive, intentional process of knowledge sharing and engagement, led by a talented problem-solver who’s always two steps ahead.

#9. They aren’t “Yes” people

Awesome CSMs are not order takers who are there to simply fix something that’s broken or robotically react to a given situation. The best ones challenge customers in a professional, constructive way. They know that the “customer is always right” from the 30,000-foot perspective, but they might be dead wrong in their application of a product or their problemsolving approach. Striking the right tone between courtesy/appreciation and respectful correction can build credibility and make the difference between apathetic customers and ones who are fully engaged.

#8. They ask open-ended questions and listen

Awesome CSMs are great listeners. They can take a simple question and build on it with the “what,” “why,” “how,” and “tell me more” that showcases both their deep knowledge of your products and the fact that they were listening really well in the first place. They are also comfortable with silence, giving an interaction enough space to let the heart of an issue reveal itself.

#7. They do what they say they will do

Awesome CSMs keep their promises and they own their mistakes. Automation and artificial intelligence play a critical role in a successful CS strategy, but the human touch of accountability and adaptability can often deepen a customer relationship faster than anything else.

#6. They know the capability and value of your products

Awesome CSMs know both the technical capabilities of your products, as well as the holistic value they deliver to meet customer needs. Product education is a fundamental — but often trivialized — part of the CS experience. But without it, it's impossible to move customers along the life cycle from usage to value realization to advocacy.

#5. They learn your customer's business

Awesome CSMs take the time to know your customer's business goals, key performance indicators and pain points. They do the research, and they value every touchpoint as a new opportunity to learn and deepen the relationship. If a customer doesn't feel like you're interested in investing in them, they'll soon lose the urge to invest their time and money in you.

#4. They will always be closing consulting

Awesome CSMs turn the age-old ABC mantra to one built on a consultative mindset. It's critical to remember that underinvesting in CS functions changes the sales process. It shifts the training, troubleshooting and customer coverage work to your sales force, taking away time better spent nurturing the relationship and bringing new leads and customers into the funnel. CSMs who can not only relieve that burden from sales, but also contribute to customer satisfaction and growth, are serious double threats.

#3. They take ownership

Awesome CSMs don't burden customers with an org chart that passes the buck every time a new issue arises. They own it and embrace the responsibility of problem solving without losing focus on their mission to turn every customer into a true brand advocate.

#2. They understand what your customer needs to be successful

Awesome CSMs know that every "problem" isn't just rooted in what the software can do. Customers expect help with training, integration, troubleshooting and, most of all, improved organizational performance. They want answers — how do we reduce time spent on X, lower costs on Y, gain greater insight on Z. It's a whole new level of value they demand (and no longer just desire). CSMs who believe they are simply there to troubleshoot are completely missing the bigger opportunity to find answers that will get customers promoted and turn them into rock stars.

#1. They forget happy and focus on customer outcomes

Awesome CSMs surely want "happy" customers, but they know there's a bigger goal at stake. Creating great rapport is nice, but it doesn't mean you've improved ROI and created an ideal outcome.

*They're not simple

There you have it. Ten traits of great CSMs and, as you've figured out by now, they're not at all simple to develop. Finding and developing that skill set is a skill set all its own.

For the companies that get close to the ideal traits in their staffs, it's almost always true they're finding the resources (and the willpower) to provide next-level customer coverage to only their top-tier clients — that top 20 percent that's generating 80 percent of the revenue. But it's almost always true, too, that these companies are missing a huge opportunity for retention and advocacy from mid-tier and bottom-tier customers. If there's consensus that these 10 best practices are on the mark and that a proactive engagement philosophy is good business, then the philosophy should apply from the top of your customer list to the bottom, right?

Don't try to build everything from scratch. You can check off all 10 traits on this list by finding the right partner who understands your business and your customers, and can help you build a realistic ROI model and concrete plan of action. And the next time LinkedIn bemoans the depth of the CSM talent pool, you'll be increasing renewals, driving new revenue and decreasing churn like never before.