# Building a better strategy for effective go-lives that can lead to greater solution adoption

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# What I'm going to cover

- As the Buddhists say, it's expectations that cause suffering
- Telescopes have two lenses
- Myths, Facts, and Dreams
- Checklists and other crutches
- Strategic Secrets

# What do customers want?

- Speed to go-live/production/usability
- Speed to value
- Technical support that's easy to use, responsive, and accurate
- Clarity of what needs to happen to make the solution operational/usable
- A roadmap of what's required to realize value

# Some downer research

- **Customer success is a broken promise in 95% of tech companies**
- **CEOs, CROs and sales teams are generally preoccupied with chasing new logos, and scarce CSMs scramble to minimize churn and secure upsells**
- **Frequently, they have no idea about their customer's business objectives or success criteria**

**Chasm Group**

Source article - https://chasmgroup.com/why-nows-the-time-to-get-customer-success-right/

# Reasons customers churn

1. **Pricing & pricing model** — Customers churn because of the way you price, especially true for commodity products.

2. **Value** — Customers are not getting *timely* desired value from the product.

3. **Value is not communicated** — Value is not communicated to the functional, executive, or economic buyers. QBRs and EBRs are infrequent and ineffective.

4. **Value is not communicated continuously** — Value is not communicated to the functional, executive, or economic buyers continuously. You are not relying on continuous Digital Business Reviews (DBRs).

5. **Customer Success limited to high-touch segments** — Customer Success is lacking or limited to high-paying segments.

6. **Micro Pyramids** — CSMs are paying more attention to bigger accounts within their portfolio of named accounts. This - in addition to we paying zero attention to low and medium spend accounts.

7. **Competitor-driven churn** — Competitors are offering better value and a lower price.

8. **Product-customer fit** — Selling to customers who aren't a good fit for the product.

9. **Experience** — Bad user experiences due to buggy products, bad support, lacking customer success.

10. **Onboarding** — Lack of customer education and proper onboarding. You are not providing proper onboarding to users of your product.

11. **Executive Onboarding** - You are not onboarding executives and economic buyers. Onboarding economic buyers is equally if not more important. They direct their teams and if they know the value for product provides, they will find time for users to onboard.

12. **Feature bundling** — features customers do not need are bundled together, and therefore the price to value ratio does not make sense.

13. **Cash-flow problems at Customer**.

14. **Loss of Champion or Executive Sponsor at Customer.**
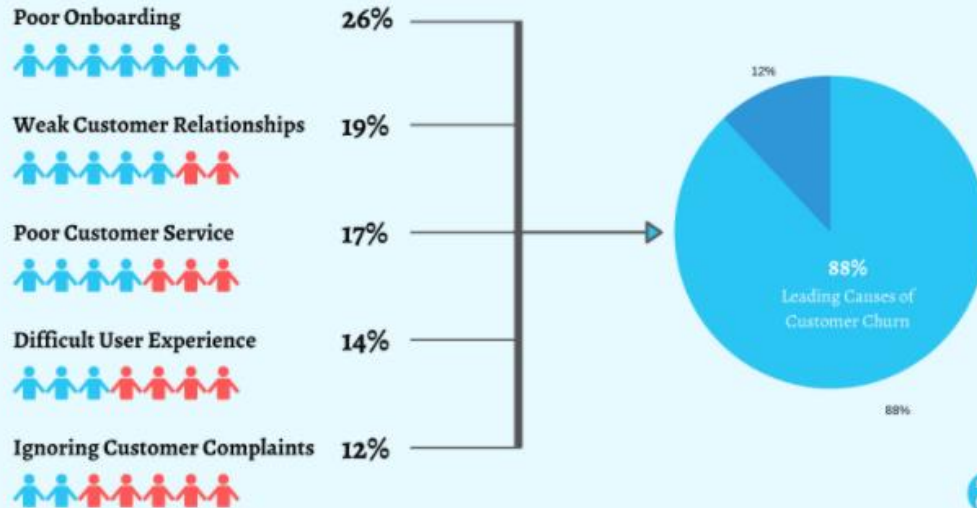
**Courtesy of CAST**

*In working with a number of SaaS portfolio companies, I have found that there are two causes of churn that occur more frequently than any others. They are:*
*• failure to successfully onboard the customer and*
*• loss of the champion who drove the purchase. — David Skok*

*Matrix Partners*

Leading Causes of Customer Churn

Poor Onboarding — 26%

Weak Customer Relationships — 19%

Poor Customer Service — 17%

Difficult User Experience — 14%

Ignoring Customer Complaints — 12%

88%
Leading Causes of Customer Churn
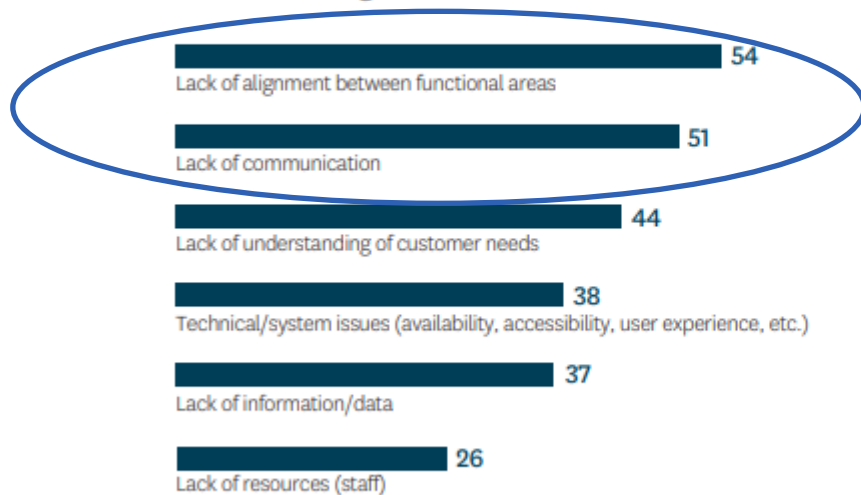
www.zonkafeedback.com

# Digging a bit deeper

**FIGURE 1**

## COMMON FAILURE POINTS DURING ONBOARDING

Executives were asked to rate the driving causes of common failure points during the B2B client onboarding.

**54**
Lack of alignment between functional areas

**51**
Lack of communication

**44**
Lack of understanding of customer needs

**38**
Technical/system issues (availability, accessibility, user experience, etc.)

**37**
Lack of information/data

**26**
Lack of resources (staff)

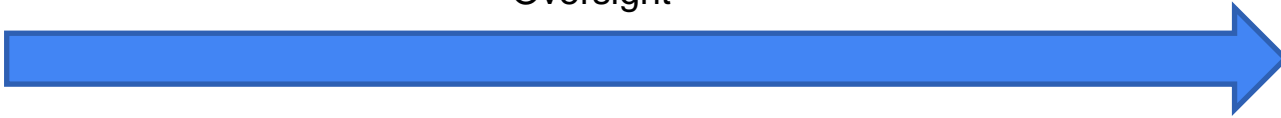**SOURCE** HARVARD BUSINESS REVIEW ANALYTIC SERVICES SURVEY, AUGUST 2016

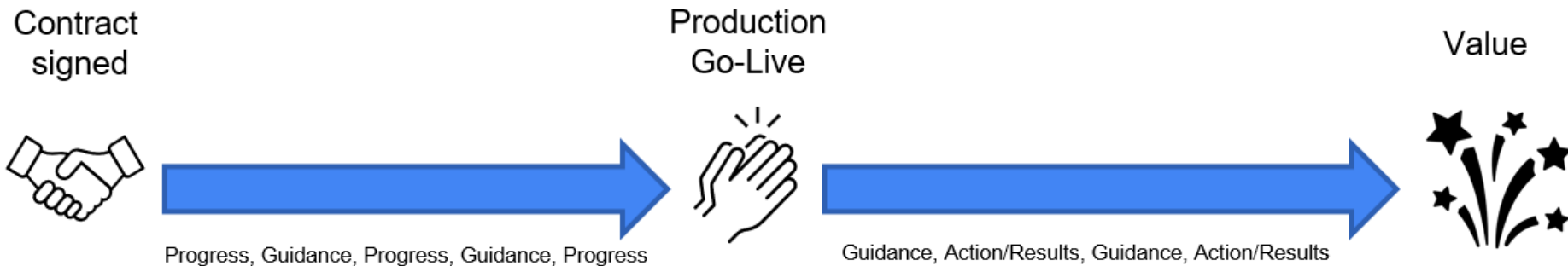Photo courtesy of Krissana Porto

# Is this onboarding?

Contract
signed

Go-Live

Oversight

Plan, Progress, Stumble, Progress, Delay, Go back, Progress, Find more budget, Progress, Point fingers, Aligned

Contract signed

Production Go-Live

Value

Progress, Guidance, Progress, Guidance, Progress

Guidance, Action/Results, Guidance, Action/Results

**Which slide would the customer choose?**

# Myths

- Specific and obvious steps
- Boring
- An exercise in project management
- Just check all the boxes
- At completion, the customer is good to go



Photo courtesy of Etienne Boulanger

- Fraught with challenges/confusion/anxiety
- Often viewed as lesser cousin of selling
- Multiple groups, multiple POVs
- Can have a corrosive effect on adoption
- Vendor executives often steer clear



Photo courtesy of Tim Gouw

# Dreams

Onboarding should be…
- Meet both strategic and tactical goals
- Inspirational
- More than checklists
- When the customer's energy and engagement steadily rise
- How the best foundations are built

Photo courtesy of Benjamin Davis

# Checklists are great but something is missing

## Set Up Automation for All New Customers

- ☑ Create an automated welcome email that triggers when a new user signs up
- ☑ Schedule a follow-up email to invite your new customer to login to the software that triggers after two days of inactivity.
- ☑ Build a greeting message for the initial login that includes a CTA to take their first action.
- ☑ Design feature callouts that pop up when a user enters for the first time to help them navigate.
- ☑ Create content for all your empty states (the areas within your product that don't have content or data in them until the user adds their own).

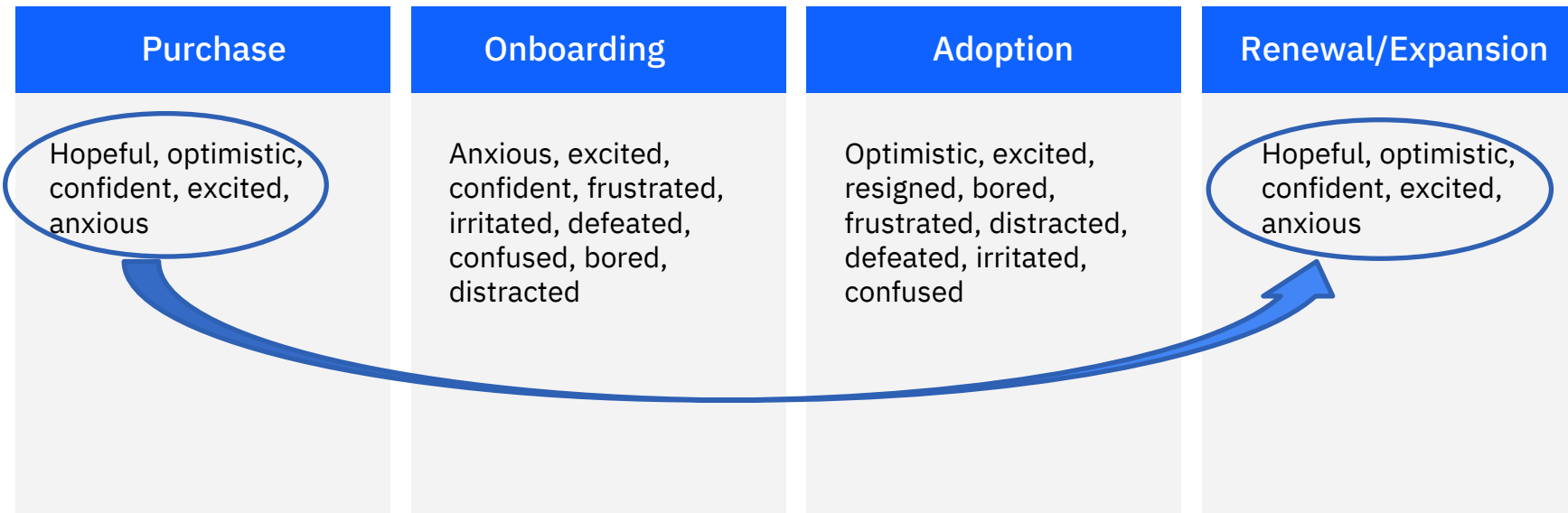## Tasks to Do Individually for Each New Customer

- ☑ Schedule the first meeting between your customer success team and the new customer
- ☑ Send over the welcome packet with the due date for the Customer Intake Questionnaire
- ☑ Prepare welcome packet for the new customer, filling in their specific Customer Success Team members, business objectives, and expected due dates
- ☑ Co-create Success Plan with clear milestones and associated KPIs
- ☑ Celebrate once client hits an early milestone. This could come in the form of an in-app notification, handwritten note, or a small treat delivered to their office.

# All these other variables

- Customer teams outside of sphere of influence (Partner, IT, HR, etc)
- Economic buyer who disengages, is distracted, or leaves
- Long timelines
- Data complexity
- Insufficient program communication
- No clear connection for all between the onboarding and business effect(s)
- Swapped out vendor and/or partner team members

# Can affect a customer's range of emotions

| Purchase | Onboarding | Adoption | Renewal/Expansion |
|----------|-----------|----------|-------------------|
| Hopeful, optimistic, confident, excited, anxious | Anxious, excited, confident, frustrated, irritated, defeated, confused, bored, distracted | Optimistic, excited, resigned, bored, frustrated, distracted, defeated, irritated, confused | Hopeful, optimistic, confident, excited, anxious |

# What can Customer Success do to bridge?

# Ensuring this requires advanced skills

Customer Success needs to oversee all of this

| Leadership | Communication | Program Mgmt. | Collaboration |
|---|---|---|---|

**Leadership**
- Engaged
- Executive level
- Customer Success
- Partner(s)
- Customer

**Communication**
- Directional
- Clear
- Transparent
- Consistent
- Honest
- Inspirational

**Program Mgmt.**
- Competent
- Professional
- Comprehensive
- Assertive

**Collaboration**
- Embrace the challenge of breadth
- Remember the goals
- Drop defenses
- Hold everyone accountable throughout the journey

# Customer Success – don't forget your needs

✦ CS Operations passive involvement
– customer intel is always the key to success
– the elements of great success plans are built here

✦ The skill to communicate with clarity, precision, and with inspiration

✦ Customer's executive endorsement and support as go-live approaches

✦ Customer Success executive involvement and support throughout

✦ Commitment from customer to deadlines and engagement with onboarding survey(s)

✦ Technical assistance from your own company and from the customer's that is responsive and accurate

✦ Agreement from customer about how success will be measured in a success plan over next year after onboarding

✦ Commitment from other stakeholders to engage and to meeting their deadlines

- Think long-term
- Embrace complexity
- Lead
- Build partnerships through transparent and respectful communications
- Sweat the details
- Be a story-teller
- Be brave