



Peter's Perspective: Customer Success Mantra: A One Act Play

(Director's voice: Okay, you've practiced the mantra. I've heard you say it a hundred times now and I have to say it comes across in the spirit and the intonation of the Buddha himself. So, here's the scene. When the curtain rises and the lights come up, you're going to be standing on a stage in front of a large audience. Don't worry, the lights won't be blinding because we can't afford that. We can barely afford the curtains. I mean, we're at a local meetup and it's a high school gymnasium, not Carnegie Hall.

Without wasting a second, you'll immediately start quizzing the audience about something they are probably all in agreement about. And that something they are probably all in agreement about is also something they rarely give a second thought to. That's because no one questions it. There's so much noise about the topic in the network conversations every day, that it seems to us to be the place that everyone thinks holds the secret to great Customer Success. We think otherwise and so do you, right? Right. Your job in this TED Talk for low budgets is to educate and convince the audience that by accepting conventional marketing-speak, they are missing something far more important and therefore will never achieve a state of grace – sorry, I get carried away – true success in the world of Customer Success. Therefore, you need to convince them there's truth in the mantra that the company needs all customers to be successful. Why that? Remember what the previous scene set up for you. Cutting to the chase... Just because someone wants peace on Earth doesn't mean it can just be wished into existence. The conditions for it have to be constructed and it has to involve everyone. The same with customer retention and growth.

Enough of the metaphysics, let's do this.

After a few challenges to the audience, you'll pivot to try and persuade them to understand and accept something that to you is a very simple concept. That concept is this... you can't achieve great things in life without first planning for your success and then putting in the hard work. I'm sure Maya Angelou or the wooden teeth guy – yeah, George Washington, or Abe Lincoln, or Howard Stern said it first, but you can take the credit. Good luck! Take it away...)

Actor clears throat and starts their talk...

What's the most important responsibility of a Customer Success organization today?

I'll give you a clue.

It's a responsibility that's even more important than the one we hear about all the time. Yeah, that one that says we must pour every ounce of energy into its pursuit. Yes, it's more important than the effort to retain customers.

Yeah, yeah, I know. Sacrilege. I'll go further and say that it's also a responsibility that's more important than the one that requires us to make our most strategic customers "happy" or "delighted".

(Director's voice: Sure, air quotes are lame but use them anyway).

I hear you saying, "what the heck?" But hear me out. It's also the responsibility that's been the most important one since Customer Success emerged on the scene over 20 years ago and yet it's one that gets no fanfare, no notice in the C-suite, no write-ups in HBR. And it's one that you are all doing every single day – or you should be anyway. And yet most people wouldn't name it as being in the top 10 responsibilities of CS.

That responsibility is....

(Director's voice: Yes, do it... do the drumroll with your hands. Would've loved to afford a band but...)

It's the responsibility that says the organization has to continually professionalize and industrialize what it is building.

(Director's voice: Keep calm. I see them scoffing and readying the tomatoes. Yeah, of course that last line flopped like a parasite-ridden fish on the dock but remember the mantra...The company needs all customers to be successful. Seriously, we needed the sad trombone to come in at some point anyway. Keep going)

I'm pretty confident almost everyone reacted in one of two ways to that last sentence. You're either confused or you disagree. It either makes no sense or it sounds self-serving. In any case, it probably casts the opposite image of how Customer Success likes to portray itself – as being in service to others. After all, saying the most important job is to self-improve comes across more as Oprah than Elon. And everyone would rather be Elo.... Anyway...

Here's my logic for saying professionalizing and industrializing the practice is the most important responsibility.

Let's start with this → What's the purpose of Customer Success?

The purpose of CS is to programmatically ensure that customers receive sufficient enough value from their investment that they make the decision to renew, and ideally expand, the commercial relationship at the end of the subscription period.

Sounds super dry but straightforward, right? Nothing flashy or controversial about it. It offers an elegant description – okay, not elegant... maybe clear is a better word – a clear description that says something big but is just vague enough that it leaves a lot of room for people to figure out how the big thing can be achieved. Makes everyone happy because when people see it, they think they have a lot of freedom. And who doesn't like freedom? You know who doesn't? People who want to control a narrative that should be yours to control. And a too vague description allows others to take control of the narrative. They make it whatever they think it should be. So, if a head of sales sees that description, they zero in on the words "renew" and "expand" because those are dollar signs spelled differently. They will then conclude that those are what you are going to spend all your time and effort in doing.

As an aside, I actually like the description because I think you could recite it repeatedly – maybe even excitedly – at a dinner party or a wedding reception when someone asks you what you do for a living. While it still might elicit yawns and their speedy dash to the bar or the restroom, saying that to someone would at least inform them well enough that they'd walk away better educated than if you said, "I work with customers to make sure they can use the products". I mean, come on... what does that even say?

(Director's voice: You might be losing them. Bring them back

So, that's the purpose – helping customers realize value so that they renew and expand. But because of its vagueness, the description leaves too much space for interpretation. That's why we can't say that focusing on retention and expansion are the most important responsibility of Customer Success. If that were true, it would be true for every department in a company. Shouldn't payroll have a focus on driving customer retention and expansion by ensuring a company's employees are paid accurately and on time? It's not a straight line but neither is the one for Customer Success. So, we have to look deeper to find the most important responsibility of the Customer Success organization because retention and growth can't happen without other things happening first.

(Director's voice: I know it feels like you're on a tangent but keep calm and remember...The company needs all customers to be successful)

In order to achieve what the purpose says about ensuring that customers realize value, Customer Success has to do many things (responsibilities) right. And they have to do them repeatedly, cross-organizationally, almost flawlessly, and at scale. That's why we refer to customer success (lower-case) as essentially an orchestration of effort. And that requirement to orchestrate is why so many CS organizations struggle with achieving the purpose. The conductor is missing and so the musical score fails to make sense.

It's not difficult to do those orchestrated things for a small number of customers. Want to know why? Because doing it for a small number of customers relies almost completely on the skills and personality of some individuals. People have made entire successful careers based on their ability to persuade, cajole, and force other organizations to do things for the customer they would never have dreamed of doing on their own. Take it from me. LOL.

(Director's voice: Okay, I see that the LOLing went over well. Congrats. Don't do it again)

It's next to impossible, though, to do those orchestrated things for a large number of customers if you're just going to go and try doing them in the same way you do them for a small number of customers. The math won't work. You can't defy physics even though every year, countless CEOs and CFOs try to force their companies to try. Why do you think Sam Bankman-Fried hit the end of the line? There's only so much soaring one can do before gravity wins.

(Director's voice: You've got them! Keep calm and remember...The company needs all customers to be successful)

You have to respect the physics and make the math work. You have to understand that if you want to make customers successful – ALL customers and not just a few “strategic” ones that you're willing to bet the farm on – it means you have to build the repeatable and measurable processes for that to happen. Seriously people, after 2022 do you really believe you have the ability to guess which of your customers are good bets to be your customers two years from now? The smartest people on the planet could not have predicted what we lived through over the last 12 months. Why would you want to bank on fewer than 20% of your customer base, the only ones you really care about and talk to - being the ones that will bring you steady and expanding wealth over the next 5 or 10 years? You need to think about the customers you aren't talking with more than about the ones you are talking with.

A little hubris does a lot of damage. Don't be hubristic.

(Director's voice: OHHHHHHHH, I LOVE THAT LINE! Now, it's time to bring this baby home)

Groucho Marx once said, “Why should I do anything for posterity? What has posterity ever done for me?” You might want to keep that idea of posterity in your mind as you try to advance your Customer Success career. If you're a conventional Customer Success Manager, the truth is that only a few lucky customers (who may go bankrupt anyway) will remember your stellar advice and over the top service. But if you think differently, more expansively, and if you leverage your innate curiosity and combine it with technology to engage and influence all customers, you will be a legend to many, even if they never knew your name. Because you were able to help create a reputation, a brand, that symbolized to customers something that they wanted to associate with or even invest in.

I wish you the best and I'll be hanging out afterwards if you want to buy me a drink or give me a sneer.

(Director's voice: That's a wrap!)