ESG Presents......

Rants of a Customer Success Analyst

A real, raw, authentic, and curious look into Customer Success Operations & Analytics

Justin Garlock

esg
Customer Success
as a Service®

Table of Contents
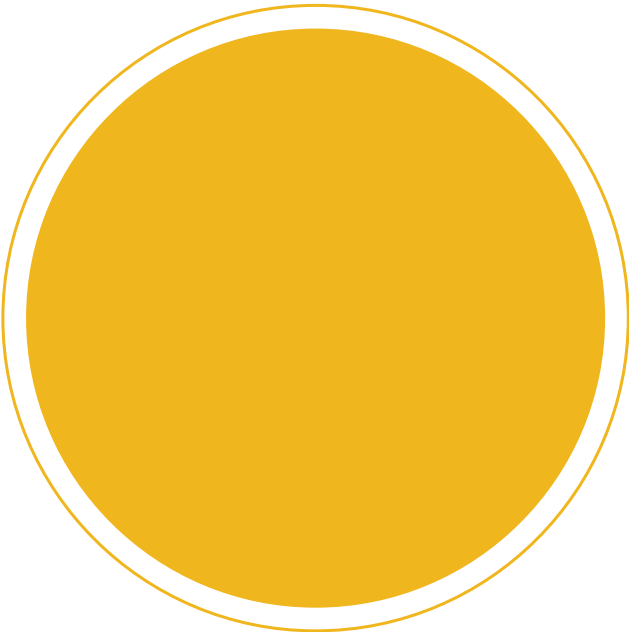
Special thanks to:

Kate McBee
Marley Wagner
Caitlin Woods
Dan Gomby

for their contributions to edit, design, and review content.

Rants of a Customer Success Analyst — The Why

The memory is vivid: a dark blue piece of construction paper, a fresh unused roll of tape in a handheld dispenser. I remember looking around and seeing my classmates using crayons, markers, and massive pencils to create their parent's newest piece of fridge decor. Scissors were used by some, glue bottles and sticks by those less trusted. Why was no one using the tape? I remember the feeling of being consumed by this question as I stared at my blank canvas, glancing at the pristine, intact roll of tape, and then back to the blue paper. I remember the uncertainty in my mind placing the first piece of tape on the construction paper—starting at the top left corner and ending at the center. The second stretch ran from the bottom left corner to the center, the third from the bottom right corner to the center, and by the time I placed the end of the fourth piece at the top right corner, I knew I was onto something.

The next five to seven minutes were filled with what my table mates must have viewed as the erroneous workings of a child gone mad, but with each strand of transparent tape I placed, the blue began to fade and was replaced with the ivory of multi-stacked strands of tape. At last, my masterpiece was complete. I did something no one had ever done. I did something no one even thought to attempt. The roll was empty, my fingers gummed in the remnants that never found paper, my mind and curiosity—liberated and unaware that this moment would become my most early memory in life, the most notable leading indicator of how I think, analyze, process, and learn.

Welcome to Rants of a Customer Success Analyst. I'm Justin Garlock, and throughout this book, I'll be providing you a firsthand look into the mind of a Customer Success Analyst: how we should think, what we should be doing, what we should be asking, and how we should execute and deliver.

I'll share stories from my life—some humorous, some embarrassing—that combined with my experience working with a variety of clients, from SMB to Enterprise Fortune 500, will provide a framework for the emerging and vital role of Customer Success Analyst. You'll be presented with real industry challenges with how Customer Success Analysts can contribute to the resolution or remediation of those problems—with a little bit of ranting of course!

No buzzwords for the sake of sounding like the cool kids.

No false claims of perfect data.

No magical tool to fix the lack of a data warehouse.

Real. Raw. Authentic. Curious.

I do not claim to be an omniscient expert in my field or have the answers to instantly increase all the three-character financial acronyms; however, I spend a lot of time observing, processing, evaluating, learning, applying, and as a result I've unintentionally molded my curiosity into deliverable value being unafraid of asking the often evaded one-worded question that unsettles the norm: **WHY?**

So, if the above appeals to you—and you want to learn what crocheting or hand sanitizer have to do with Customer Success—keep reading for The Reason, The Rant, and The Resolution.
This is Rants of a Customer Success Analyst.

Welcome.

Customer Success Analysts — We Don't Have to Be Data Scientists

The Reason

Beep. Beep. Beep.

I stand in line at my local pet supply store, a box of dog biscuits in my left hand, my wife's hand in my right. I can see the sun setting in a fusion of yellows, oranges, and blues just outside the sliding doors that a young woman just walked through with her pearly gray, gallant pup—could be a Labrador or a Retriever. A few customers behind us, I can hear the whining of a Terrier—could be a Bulldog with maybe a little Boxer. To be honest, I've never been great at identifying dog breeds; you don't need to know the breed of a puppy to know you need to pet it. Nevertheless, showing restraint, I look back at the conveyor belt a few meters in front of us, still packed with cans of cat food. This could take a while.

My eyes wander, my thoughts not far behind. They have big dog beds on sale—decent price, but I know my dog wouldn't use it for more than a week. A man nearby is buying fish. We did that once. He has no idea how much work that's going to be. My wife found the impulse-buying section and is looking for a new toy for our pup. They're on sale too; let's get two. I notice a crowd of folks over by the animal hospital corner of the store—mostly dogs, some cats. Hope they're okay. Isn't it a little late for a place like that to be so busy?

Beep. Beep.

How much longer is this going to take? Half of the conveyor belt is still full of cat food. I set the dog biscuits and toys on the back half of the conveyor belt and take a step to the side. Does he really have that many cats? Maybe he fosters them; that's nice of him.

My eyes drift back over to the animal hospital. Is that? I think…I think I know that person. Yeah, I definitely do. It's my college French professor! I haven't seen her in at least two, maybe three years. Sure, I took French in high school, three years if memory serves, but I didn't come out of those three years combined as fluent as I came out of the single year I spent learning from her in college. (To be fair, I was much more dedicated in college than high school, but that's to be expected, isn't it?) She made learning the language fun, relatable, even interesting—making it less about the language and more about the communication, the style, the history. What is she doing here? I didn't think she lived around this area anymore. I must see how she's doing and introduce my wife.

I wave and smile. She catches my wave and smiles big and waves back. I lean over to my wife and share my excitement. Of all the places and times, I can't help but think how crazy and random this is. I hope her pet's okay.

Our merchandise is being rung up now. I enter my phone number—for the rewards—and catch her eye again, gesturing to indicate we will make our way over after we finish paying. Amazing, she has her significant other with her—would love to meet him as well. He's taller than I thought he was.

My wife grabs the bag of dog biscuits and the two toys, and we turn the corner to start walking down the aisle that leads to the animal hospital. He's sitting down now, and she's crouched down next to their dog. Her smile is getting bigger as we get closer, about halfway down the aisle, fifteen feet to go. Do we know each other well enough to hug? I'll offer a handshake first and we'll go from there. Ten feet to go as her smile gets bigger and she stands up. Why is she so tall? Five feet away. Wait a second, I don't think…is it? It's not. Oh no. What do I do? It's not her. Why is she still smiling? Justin, just tell her you made a mistake—tell her you mistook her for someone else. Justin? Why are you still smiling? Why is your hand reaching out? Don't say it…Don't say it.

"It's really nice to see you!"

My hand is outstretched. I can feel the blood draining from my head, my cheeks flushed. I should have just turned around. How do I get out of this? Just apologize. Tell her you made a mistake. Wait…what? Why is she shaking my hand?

"It's really nice to see you too."

She takes her other hand and uses it to wrap over our handshake. The double-handed clasp? This is the most genuine handshake I've ever received; her tone is so kind. Do I ask her how she's doing? Does she think she knows me? This stranger's husband is giving me the wildest side-eyes I've ever seen; the white of his eyes are so crisp. My wife must be so confused. After five seconds of an eternity shaking a stranger's hand, I receive a moment of clarity; the solution becomes clear: smile, turn, and walk away.

So, I do. Thirty feet to the door. I make it about fifteen before I can't hold in my embarrassment anymore. My wife is confused by my childish hysteria and scarlet face. The sliding doors swipe open and I walk out into the cool and freeing night, leaving behind a woman and her husband who, to this day, are likely still trying to figure out what just happened.
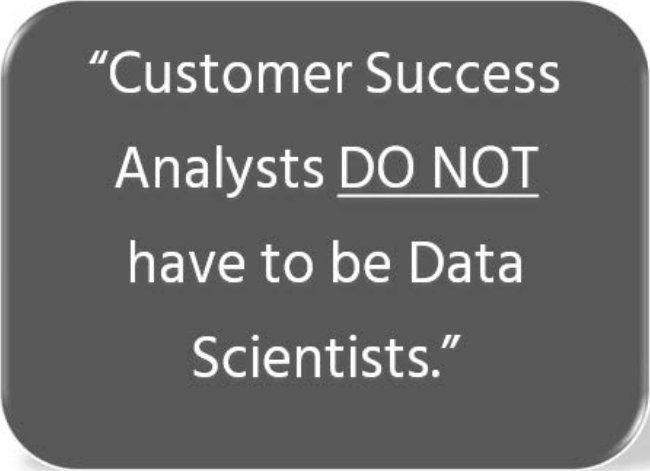
From afar, I was so certain I knew this stranger. I was so certain that I acted, and when I acted, I realized I was wrong. The moral of the story—things aren't always as they seem from afar.

The Rant

Your organization is new to this whole Customer Success thing. You're trying to figure out what to do, how to do it, who to convince, and where to start. Or maybe your organization is a bit more mature, and you're realizing you have all this data rolling in with nothing being done with it—no action driven from the numbers—so you realize you need to either hire someone or utilize an existing resource to own this function to deliver insights. You need a Customer Success Analyst.

This is the moment, in this space between seeing and acting, where your strategy can thrive or die.

I've had a lot of conversations in the past few years with folks who want to learn more about the role of a Customer Success Analyst: what we do, how we think, the skills needed to be successful. In many of those conversations, the number one thing keeping people from pursuing the role is the fear of a four-letter word—code. I see job postings all the time for CS Analyst roles that include a complete list of programming languages that are required for application, with an ensemble of technologies that the applicant must have five to seven years of experience administering—all for an entry level role.

> "Customer Success Analysts DO NOT have to be Data Scientists."

I'm only going to say this once: Customer Success Analysts DO NOT have to be Data Scientists.

Data Scientists have a specific set of technical skills that can seem very appetizing when you're thinking about the business, specifically future state: programming and linking data sources, creating automated and live dashboards, and creating an algorithmic approach to predictive models. To be clear, I'm not suggesting that the latter skills are not desirable for the role; the truth is, employees/applicants who possess, and have experience executing on, those skills are invaluable. However, by completely focusing and impulsively acting on this desired outcome, the steps needed to get to the end state are often missed—the analytical skills and the execution of the softer skills needed for the role: storytelling, curiosity, efficiency with operational processes, and willingness to disrupt the flow by asking why and why not.

The Resolution

So, how do you know when you've found your unicorn?

I'll leave you with my recommendations—

1. You need someone who is comfortable with uncomfortable data, process, and workflow.
2. You need someone who is secure learning technology stacks.
3. You need someone who will listen, observe, and process before publishing, producing, and reporting.
4. You need someone who can keep the thousand-foot view in mind while executing at ground level.
5. You need someone who can tell the story.
6. You need someone who is agile and nimble.
7. You need someone who will always ask why.
8. And lastly, you need someone who can use their technical and analytical expertise to complement the attributes above.

Customer Success Analysts are here to stay, and while from afar we can look like pure Data Scientists, there is a higher level of insight we can bring to the organization by mastering the soft skills to make our technical and analytical outputs more impactful, insightful, and actionable. You can choose to act on the immediate and impulsive reaction telling you that your college French teacher is standing in the animal hospital corner of your local pet supply store, ignoring all the indicators that point to the inverse—but you (and any nearby spouses) are then stuck in a situation that neither of you expected to be in, desperately searching for clarity in an impossible situation. Or, you can evaluate how your organization's operational journey will benefit from someone with mastery of the above recommendations and react with purpose—walking through the sliding glass doors and out into the cool and freeing night.
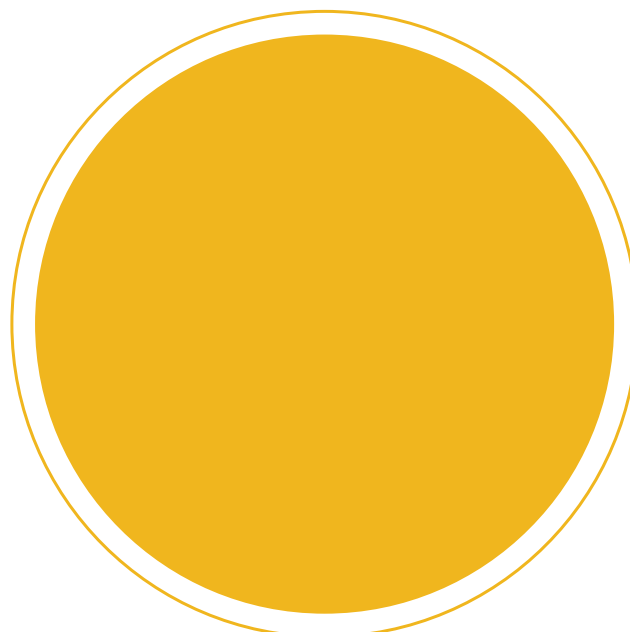
Flipping the Spoon—Your Data

The Reason

My wife and I have been married for almost seven years. We were the couple that got married fast and haven't looked back for a second. She is my best friend and the only person who knows me completely and wholly. Of course, I loved her before we got married, but there was a specific moment on our honeymoon as she walked along the beach a few paces ahead of me, the clear water gliding across her feet as they slightly sank in the sand, the sun softly approaching the waterline of the Gulf enough to create a fusion of orange and blue in the distance—the first time in my life I can remember taking the time to admire the beauty of a sunset with honesty—that was the moment when I felt the simple and compelling clarity that she was my forever person.

However, despite the love we have for each other and the bond that we continue to strengthen, there is one disagreement that still shakes our foundation—one that still echoes throughout the hallways and corners of our home. A haunting memory that visits when we are most vulnerable—one that we even went public with, splitting our group of friends as we forced them to pick a side.

It was a Saturday, early in 2020, with whispers of an emerging and relentless virus in the air. We had gone to the grocery store to pick up essentials for the following week—we do most of our shopping on Friday nights now, and sometimes I wonder if that would have made the difference that week. It was dark outside when we got home, and after putting away the groceries, taking the dog out, and getting cozy for the night, we both scooped ourselves a bowl of ice cream— chocolate chip cookie dough for her, cherry cordial for me—and sat down in the living room ready to watch a movie. As I scrolled through our ten different streaming services trying to find something we both agreed on, I notice her take her first bite of the ice cream.

Now, this wasn't the first time I had seen my wife eat ice cream; at that point, we had been married almost six years and we are no strangers to ice cream in our house. But something about this time, this night, a question that had been lingering in my mind and I had to ask: "why do you put the spoon directly in your mouth instead of flipping it over?"

Her silence stopped my scrolling as I slowly looked over to see her mouth slightly open, and eyebrows crinkled with confusion.

"What did you just say?"

The next 20 minutes were a blur; thoughts primed and unloaded through words that left hallow casings sizzling all around until we were resolved to each other's glare. In a moment of empathy—perhaps weakness—I consented to try it her way. I grabbed my bowl and got a hearty spoonful. The ice cream was half melted at that point. I put the spoon straight into my mouth, the still frozen middle scraping my teeth, sending a chill down my back that caused my body to spasm.

"No. No one does it like this!"

It was time; both of us were holding the line, refusing to retreat—we'd come too far to lose now. We turned to social media. I confidently—probably a little arrogantly—typed out the question and hit send, smug and confident in my pending victory. The final battle of the war begun as responses flew in, and I watched as lifelong friends become foe. The Non-Flippers took an early lead, but the Flippers striked back with hard and sound logic: "would you lick a cone with the roof of your mouth or your tongue?"

By the end of the night, there was a clear winner declared: by a score of 29–17, the Flippers had been defeated, and to this day any time my wife and I eat ice cream, you can catch her slyly grinning as I give her brittle side-eyes while flipping the spoon to eat the ice cream.

To the Flippers still reading this article, I salute you. To the Non-Flippers, you're in good company.

The (harsh) reality is there is no singular way to eat ice cream—there's a whole faction of people out there who literally just shove their face straight into the pint. The idea of arguing about ice cream is obviously silly; I never thought it would bring such passionate, benevolent division among friends and family. Imagine the division that would happen if we started talking about more complex and tortuous problems…like your data.

The Rant

Trigger Warning: this section contains the use of intense buzz words & phrases—see if you can pick them out

If your organization's data is flawlessly connected, complete, identifiable across systems, easily accessible, supports the documented KPIs of the business, AND there are processes in place for continuous quality and accurate hygiene…I hope you enjoyed the story. You can skip to the next section! (Message me if you're a Flipper.)

But considering each of the points above have a significant number of asterisks and sub-text—including definitions, documentation, stewardship, and risk mitigation—my guess is that every organization can target something to discover, streamline, or automate.

Let us start by baselining our understanding of the nature of data.

We love to talk about data as if it's this aqueous organism, capable of rippling throughout our infrastructure with autonomy, unable to be influenced or refined—a perpetuated jester of mocking our inadequacies. And while I love the imagery of an Omniscient Data Leviathan, the truth is most of our data is none of these things. Our data is virtually tangible; it exists (hopefully). We have control and ability to act, and in most cases, we can influence and refine the operational processes around our data. And most importantly, where data doesn't exist, we can change that.

So, why don't we? Why do companies not have control over their data? Why are there so many gaps, flaws, and breaks in process that inhibit us from being able to collect, track, calculate, report, and model to get more predictive analytics to drive decisions based in data?

The short answer: it's hard.

The long answer: it's complicated.

The Customer Success organization is no stranger to complex business challenges; it's what we address in our customers' environments every day, and what we in CS Operations are tasked to navigate through for the Customer Success organization. We are seasoned in our resolve to progress forward through the intricate and sometimes adverse reality of the mountains we climb; for this reason alone, we are ideal to facilitate the conversations around "fixing" our company's data. We need to be fearless and bold in our ability to disrupt the flow for the sake of unifying teams through complete data (and process) that will lead to decisions that come back to positively impact the customer and business alike.

To be clear, I am not suggesting it is the responsibility of CS Ops to be charged with resolving the entirety of your company's data issues—though I have seen plenty of examples where this seems to be true. Facilitation of conversations that notify and alert is our responsibility, but resolution must be a company-wide investment in effort, initiative, and objective.

Ltes tkae a tset for a moemnt—a tset taht you hvae prboblay veweid bferoe on scoail mdiea; a tset taht wlil prvoe taht the lgnoer you apdat to a crrunet satte, wtihuot tyrnig to mkae any cahgens or qeutsoin porsecs, the mroe lkiley you are to inorge the ncseiesty for caghne, icnldunig the psotivie ipmcat on yuor oaznirigaton and csumotres.

We can ignore our data issues; we can continue to read by using the first and last letter as a guide and hope the metaphorical brain of the CS Ops organization will progress in efficiency and haste (unlikely given how hard it was for me to type the previous paragraph); we can evade and hope that another team will resolve, justifying our workload with anticipated effort, but almost all of our inefficiencies trickle down to impact our customers in some way—a variable most would not consider in the risk analysis of addressing the problems now.

The Resolution

Data issues are hard; they are complicated, complex, and challenging—so instead of trying to fabricate a "How To" five step guide, I want to conclude this section by giving some words of encouragement to those deep in the battle right now: to those who don't have unique identifiers, to those who can't measure ARR, to those who are questioning why so much weight is being put into NPS, to those who are struggling to create or test a customer health score, to those who can't get buy-in from sales or marketing, to those who are struggling to connect your data sources—you are seen.

1. **Lead the Charge.** Again, it is your responsibility to ask the questions that need to be asked. Asking the 'Why' and 'Why Not' often lead to responses like "because we've always done it that way" and give you a perfect opening to function as a liaison of change. Don't be afraid of disrupting the flow if you see a problem being overlooked that will negatively impact a metric, process, or system down the road—it's justified.
2. **Start Small.** This isn't going to happen overnight. If you are missing the capability to track a specific metric that can positively impact the customer and business, implement the small and simple operational steps to make it possible—at the very least start the conversations with the right people to get momentum on your side that you can build on later. Side Note: I also recommend starting at your most base level of data collection, contract level or deal specific data, to give yourself the ability to create a true bottom-to-top view of money/health/behaviors/etc.
3. **You Got This.** There is a reason this problem hasn't been resolved yet; hard things require attention and the ability to be bold. Accept the failures—and there will be failures—you face this week and next if it means you win by the end of the month, knowing that the one win means all the positive, fancy CS buzz words and phrases.

The "doing" is the most important part—the progressing towards an infrastructure of data and process that enables you to deliver value to the customer. It doesn't matter if you flip, scoop, shovel, or faceplant as long as the objective is clear—eat the ice cream.
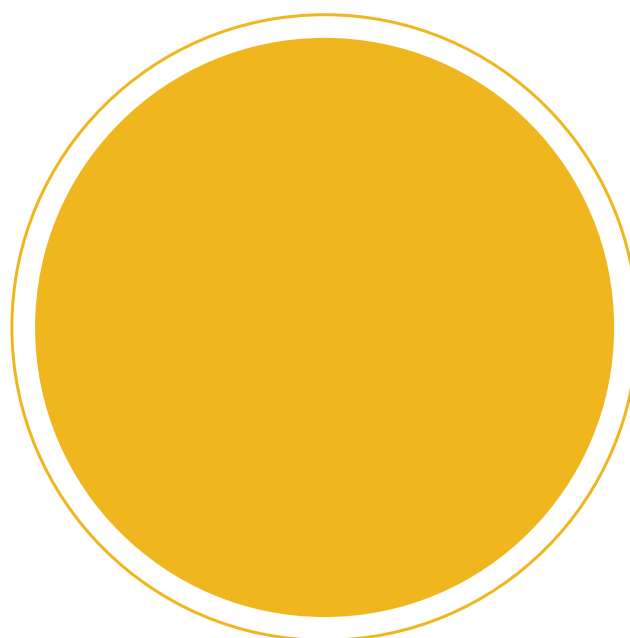
Three Letter Acronyms — Metrics

The Reason

This one is important—so important that I'm not going to try to hook you in by telling you a long, drawn out story about the day I realized the impact a letter can have—how during an indoor drumline competition, I missed my cue to remove a letter velcroed to my black jumpsuit and played the entire show with the letter A on my chest, hanging helplessly above my tenors, after having made it a point before we rolled out the tarp to go down the drumline and remind everyone when exactly in the show to remove their letters—or how defeated I felt when, on the last run of the show, my wrist clipped the bottom of the A and made me drop a stick.

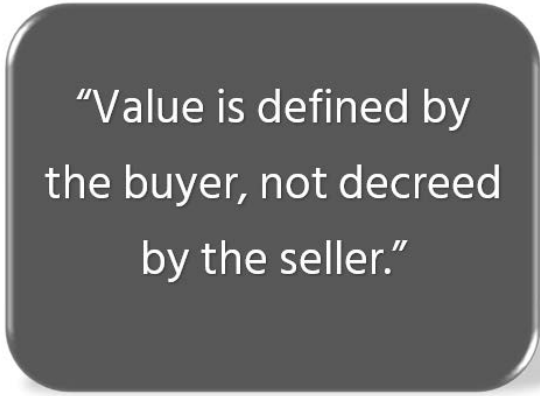Letters are important—that's all. Let's begin.

The Rant

Does your CS Ops team use a UAT approach to enable your CSMs with SOPs to view ARR, GRR, MRR, ACV, TCV, ARPU, CAC, CES, CSAT, CGR, CLV, DAU, TTFV, MAU, TTO, TTV, FCR, NPS, NRR, and PES within their customer's CSPs in your CSP to effectively deliver EBRs and meet OKRs that lead to an enhanced ICP?

Ridiculous, right? Let's all take a breath and chill on the acronyms for a minute—they're as contagious as they are catchy, leading to overuse, misuse, and in most cases calculations that are incorrect or incomplete. I'm not going to waste time trying to document how to correctly (mathematically) calculate all the three letter acronyms—but feel free to check out our Customer Success Definitions, Calculations, and Lingo...Oh My! if you need a little help there.

Instead, I want to do some level setting on some specific metrics and flaws I see in the industry.

TTV (Time to Value): The philosophy of first value is a binomial: the customer has either received their first point of value, or they haven't—value or no value. Think of first value like a goal being scored in hockey: the puck must completely cross the line for it to be considered a goal. Where the puck crosses the line, the distance between the puck and the goal line, up high or down low...none of it matters—all that matters is the puck is completely over the line. To accurately calculate time to value, we're looking for that first win in our customer's experience with our product that solves one of their business problems—the moment the puck has crosses the goal line. However, the 'how' of the puck getting over the line does make a difference in the call on the ice: it can't be hit in with a high stick, contact can't be made with the goalie, the player can't be offsides, etc. The 'how' makes the difference and is where we can make the most impact.

If you are calculating Time to Value today but can't *accurately* describe the moment in time at which customers receive value based on *their* business goals and objectives, you are not, in fact, calculating Time to Value. I hear it all the time: "value is when they log in X times" or "value is achieved when onboarding is complete." This. Is. Not. True. These are process boxes we are checking and patting ourselves on the back for, telling everyone internally our customers love our product or service. Value is defined by the buyer, not decreed by the seller.

> "Value is defined by the buyer, not decreed by the seller."

Imagine the results of a survey that asked customers when they received value from a product, compared to the lavish number we're recording. Are you confident in the alignment, and if so, can you readily provide the variables that are contributing to value delivery? My guess is most of us wouldn't be aligned with the timelines provided by our customers, and hardly any of us are running the continuous analysis to show variable contribution and impact. (Ex: Does successful completion of the Sales to CS handoff deliver earlier value? Or, how is value impacted by total number of users?) This whole process of defining value based on your customer's goals and use case is not simple, and if it is, I would suggest it's because you have a really great CS Analyst who is continuously monitoring the variables that are reducing Time to Value and, with the support of the CS Ops organization, has a process in place that captures the customer-specific criteria required to achieve that first value.

NPS (Net Promoter Score): There will be more to come in future rants on NPS, so for now I'm going to keep it simple—if you are collecting NPS but do not have a documented process to reach out to detractors for remediation, especially high touch, top tier, customers, or if you're collecting NPS by throwing the question in a clunky survey that includes room for open text response, and you don't have a methodology for analyzing and acting on qualitative data, or if you're not measuring operational metrics such as survey response rate, why are you collecting NPS?

CSP (Customer Success Platform, Plan, or Professional): Can we all decide right now which one of these terms gets to use this three letter acronym and stick with it? Cause it's downright confusing to figure out which 'P' someone is referring to in the moment; I think Plan called dibs, but I'm open to debate.

CES (Customer Effort Score): For a metric that has the potential to be a real-time feedback avenue for customers, why does the way we ask this question seem like a kid seeking praise from a parent after doing a summersault? It feels awkward to me, like we are desperate in our attempt for the customer to validate our process. I don't know what the ultimate solution is here, but I suspect there's a better way. (And please, let me know if you've got any ideas!)

DAU (Daily Active Users): If your SaaS offering doesn't require daily logins for value to be obtained, be cautious how you use this metric. Why heavily weight DAU in health or adoption scores if your product doesn't support the expectation? Also, keep the number of licenses purchased in mind when looking at this number: if Customer A only purchased one license, assuming your product supports the expectation of daily usage, and that one user logs in daily, that customer wouldn't be inferior to Customer B who purchased fifty licenses but has twenty daily users.

NRR (Net Revenue Retention): You're perfect—never change. Truly the king of CS metrics.

RYG (Red/Yellow/Green): If you are determining your customer's health based on a single variable—specifically CSM sentiment—please contact ESG promptly for assistance. I know how that sounds, but it's time to step it up! Like NPS, there will be a specific rant in the future that will dive into customer health, so let's just talk about the basics. Your health score should include multiple variables. If you do have a robust health scoring model, how do you know your customer's health score is an accurate reflection of their behaviors? (Hint: the answer is regression analysis.) If you can't mathematically prove why/how the variables in your health score are contributing, reread this section. If you can mathematically show the relationships between each variable's contribution to health score, then join me in a moment of giving ChurnZero's marketing team props for the name of their conference series, BIG RYG (pronounced big-rig). Brilliant.

ARPU (Average Revenue Per User): You're the reason our TV subscription services are always increasing. You know who you are!

ICP (Ideal Customer Profile): This one's for the executives: If you think your company has an ICP, but the individual contributors of your organization who interact with customers (Customer Success Managers, Sales Reps, Account Executives, Analysts, etc.) can't fully dictate the variables that make up your ICP, or at the very least have access to reference the documentation of those variables—it's time for a roadshow.

In all seriousness, there is a lot to choose from to focus on—especially if your CS organization is in the building phase; so where do we start?

The Resolution

With so many metrics to potentially focus on, it can be extremely tempting to see the list of three letter acronyms and impulsively act on determining the calculation without building the necessary foundation to enable action. (I remember the frenzy that CAC had on Customer Success.) To be clear, it's okay to measure anything and everything you can—especially if you have an Analyst who can run different scenario-based models on the data point; however, the real clarity and action comes when we take the time in the beginning to document and define what we are measuring, why it's important, the action it will drive, and the net impact it will have on the organization and your customers' business objectives.

Keep it simple. Include the following seven components as a foundation in your documentation for your metrics:

1. Metric –the metric that is being tracked
2. Data Source –where the data lives/where you are retrieving it from, including field names
3. Definition –the purpose of the metric: what is it?
4. Methodology –how the metric is collected, including process, systems/tools, and people

5. Calculation – the mathematical equation for the metric

6. CS Org Impact – the impact the metric will have on the actions the broader CS organization can drive

7. Customer Impact – the impact the metric will have on your customer; how is your customer going to benefit from the collection of this metric?

Below is a very basic example of what this could look like—format is somewhat irrelevant, as long as it is documented, strategized, and available to show, both internally within the CS organization and cross-functionally.

| CS Operations - Metric Documentation - NPS	
Metric	NPS - Net Promoter Score
Data Source	<Insert Data Source Here>
Definition	A customer loyalty and satisfaction measurement taken from asking customers how likely they are to recommend your product or service to others on a scale of 0-10 , with 0 being very unlikely and 10 being very likely. Customers who respond between 0 – 6 are considered Detractors, 7 or 8 are Passives, and 9 or 10 are Promoters.
Methodology	Surveys will be sent to customers out of the CSP. NPS surveys will be sent twice a year: once after onboarding and once after half the term of contract has past, and analyzed by the CS Ops team. Results reflected arrucately and live in CSP. Results published internally once a month.
Calculation	NPS = % Promoters - % Detractors
CS Org Impact	CS organization will be able to categorize potential advocates and target detractors for remediation. Target customers idenfiable for champions/advocates to pass to marketing.
Customer Impact	Embeded process to remediate, potential indicator of value received esg

To focus and magnify your documentation even further, you might consider adding the following: how the metric aligns with your organizational charter, any data stewards or data source dependencies that impact the automation or receiving of the metric, organizations outside CS that you rely on for the metric and their dependencies, where/when in the customer journey the metric is executed, and any future phase planning that may adapt, modify, or alter components of the metric.

Each metric that you choose to collect, and each data point that is collected from your customers, needs to have purpose, and the ability to positively impact your company and your customer's business. If through this process we discover that a metric we are set on collecting isn't leading to action that will positively impact the customer, we may need to reconsider if the time/effort/money required to collect the metric outweighs the lack of impact it has on the customer.

For anyone wondering why this is valuable, let me close with a few reasons to highlight the value of going through this process.

1. **The Calculation:** If nothing else, by documenting the equation you're using, especially if altered from the standard industry definitions, you can easily showcase the 'how' to other internal organizations who may be tracking a similar or identical but slightly differently calculated metric. The most common use case I come across here involves data sources not matching, which leads to the next point…

2. **Cross-Organizational Collaboration:** Imagine marketing asking how TTV is calculated because they want to launch a targeted value campaign, but you don't have anything documented. They have access to CRM data, of course, but aren't connected to your CS Platform. Now you have to spend an hour on a call explaining the differences between data, the calculation, and the dependencies you face. Now imagine if that call was five minutes to simply validate understandings of what's in your documentation and maybe answer a question or two.

3. **The Success Plan for Analysts: I**n my experience, most of the information I've outlined lives in one, maybe two, minds and because of workload and deliverables, those minds don't have time to document their process—new requests come in for more metrics, more data, more insight, and the work continues. All it takes is that one person to go on vacation or leave the company, and the entire team scrambles to try and recreate, learn, and action the process. By implementing this documentation process in the beginning—before any data is organized, connected, or collected—we can use it as a guide to implement, modify, and action the metrics we analyze. It becomes a living document for Analysts to run the numbers behind the business and deliver the results and insights the organization ultimately seeks.

Your business is unique—your customers have unique needs and objectives, and with that in mind none of what I've said today is intended to negate or contradict the metrics your organization chooses to prioritize. Our role as CS Analysts is to continuously run experiments to try and get the most accurate predictions and models possible to deliver insights to the CS organization; that means to some extent, we should be looking at all of these metrics, running comparison tests to see if there are additional variables impacting our health, NPS, retention and renewal rates...But before you dive into to the data, take a moment to document the why, make sure it aligns with the objectives you're looking to achieve, and then UAT test with the CSMs to develop SOPs and automate CTAs to bring a positive impact on ARR, GRR, MRR, ACV, TCV, ARPU, CAC, CES, CSAT, CGR, CLV, DAU, TTFV, MAU, TTO, TTV, FCR, NPS, NRR, and PES—had to get that last one out of my system.
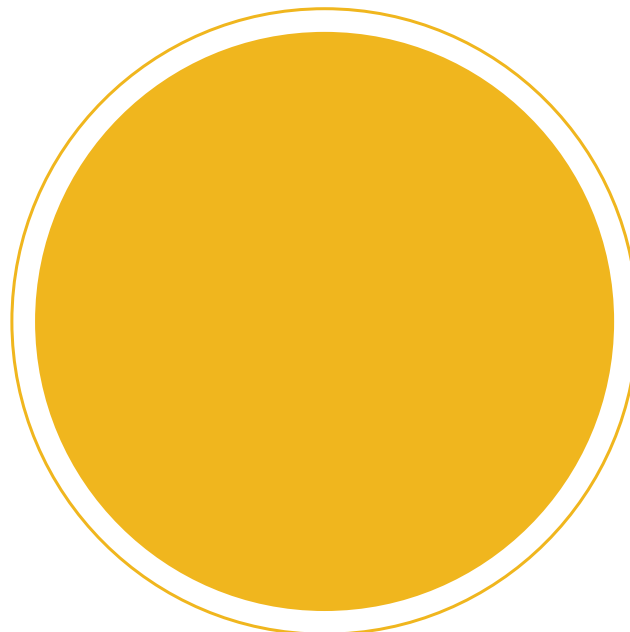
A Call in the Night — Empathy-Driven Action

The Reason

The year is 2008 and I just turned 18 a few months back; I'm still living at home with both my parents and my two brothers —I'm the middle child (if you hadn't guessed that already). It's only been about six months since I graduated high school, so I still have at least six months left in what I'm calling my 'buffer-year.' To be honest, I don't really know what I'm going to do with my life next. Freshman and sophomore years of high school were pretty good—I stayed focused on my grades and my GPA reflected it. But the summer before my junior year, I caught a bad case of (early) senioritis and my class rank plummeted as Fs and Ds occupied progress reports for the entirety of my junior year; senior year was still a struggle, but my mediocrity was enough to get the diploma. None of that matters now though—high school is done, and I'm left trying to figure out how to spend the next 60 to 80 years of my life. Thankfully my family is supportive.

I'm working part-time at one of those pony-keg drive thru places and practicing full-time with my band—I'm not sure if we'll go anywhere, but the process of creating something from nothing with some of my best friends keeps me optimistic. Other than that, not much is going on in my life right now: college seems like a distant and uncertain concept, and I don't have the money to go off and travel the world—so for now, this is my life, and I'm okay with it.

It's a fairly normal Sunday morning as I'm making my way to the kitchen to grab some breakfast—no one better have touched my yogurt, or I swear. My brothers and mom are in the living room as I make my way to the kitchen, leaning down first to give our little chihuahua some morning love pats on her little head. I hear a sniffle from my mom; It's a little late in the year for allergies, isn't it? I look over and my older brother is on his laptop with an intense focus in his eyes and suddenly, I can feel it now—something's off; the room feels heavy, a little tense, and overwhelmingly sad.

With hesitation, I ask, "what's wrong?"

"Your dad's mom passed away last night."

That's when I realize what my brother's doing—booking flights for my dad. See, my dad's a big rig driver; he has been ever since I can remember, and a pretty darn good one at that. I've seen him navigate up, in, and out of spaces and places with eighteen wheels that most people couldn't with four; how's he going to steer through this one? At this moment, he's in his truck and on his way back home from a long run out west—Wyoming, I think. I can't help but wonder how he is taking the news. He's alone, and driving. I hope he doesn't wreck. I wish I was with him. I've never seen my dad cry before—not that emotion wasn't tolerated in our household. It's actually quite the opposite; my dad, my mom, maternal grandparents, even my brothers are all comfortable with both displaying and sharing emotions. My dad just processes and displays emotion differently; he seems to spend more time pondering and then supporting with this unique type of gentleness that required few, but impactful words. But this felt like it was going to be different, and mom must have known that—and that is when it hits me.

"He doesn't know yet, does he?"

The answer is clear as we sit in silence.

In the space between sleep and awareness, a call had come in the night—a call that would change my life, but not for the reasons you may be thinking. I knew my dad's mom, my grandmother, but not very well. She had always lived in Utah, and I've only been out there once in my life. What changed my life was never being able to forget the feeling in my heart as my dad walked through the front door, with his work bags in hand, completely unsuspecting of the sorrow he would soon be forced to carry, or the weight of his bags hitting the floor as his shoulders and chest sank when my mom told him. It was that exact moment, standing in the kitchen of our house on Melrose Avenue, that I saw my dad cry for the first time in my life, and that I truly, deeply, and wholly recognized that I felt empathy.

The Rant

Life can be challenging; it can be messy, complicated, disorienting, and unjust.

Life can be exciting; it can be fun, surprising, joyful, and fair.

In the span of a week, think of all the emotions you experience based on your circumstance in life: the joy of holding your newborn baby you've waited a decade for, the nostalgia of smelling your leather baseball glove as you play catch with your daughter who just made the varsity team, or the catastrophe that follows the heart-wrenching decision of having to lay your family dog to rest—think of how often you have to dig deep within your consciousness to keep fighting and progressing with everything in your being. Your life is a matrix of winning, losing, learning, feeling, winning, and losing again; the good times are fantastic, and the bad times are almost unbearable. And yet, you still wake up, get ready for the day, and carry forward—performing your responsibilities in your profession and your relationships. This is you. This is most of us.

So why do we act like our customers aren't the same? Why do we romanticize our customers into these unexpressive beings whose sole purpose is to do what we want them to do with our products, with no thought into how they feel, what they are experiencing, or their circumstance in life?

In Customer Success, we love to say we hold the role of trusted advisor to our customers near and dear in our identity, with claims of making sure the customer gets the value *they* are looking for out of our products or services to meet *their* objectives. It's the 'trusted' part that makes me pause. What makes us trusted? Why would a customer—a person—choose to trust a random employee of a random vendor for a random product they use? The answer is...they probably don't. They probably don't trust you just because they received an email from you saying that you are the new go-to person for all things product related and that you are there to make sure they get answers to questions and receive the value they purchased, and that they can contact you any time.

You can be more sincere than that. Demonstrating empathy means you have to take an interest in your customers as people first, customers second.

I won't claim that ESG is perfect in all process, functionality, and philosophy—I'd argue no company is. However, our CEO, Michael Harnum has made it perfectly clear to employees and customers alike that ESG is an employee-first, people-first organization. It's a philosophy that means thinking about how people will benefit, struggle, thrive, or stumble based on their fluctuating circumstance of life. It means understanding that people will perform their best over time when they aren't expected to compartmentalize. It means that it's okay to be down, it's okay to struggle, and conversely, it's okay to be happy and share that light with others. It means creating an environment where empathy can organically thrive throughout the organization.

Not everyone gets this right all the time; there are two quotes that I've personally heard that stand out in my mind and I can't write a rant about empathy without mentioning them.

The first quote is — "It's just business."

I have always struggled with this philosophy. Business is not possible without people. People are the business, and those people—our customers, our prospects, our employees, are all subject to the trials and hardships of life. I understand that sometimes hard decisions must be made in the interest of either keeping the business alive or progressing the business forward—but we have all seen the flashy headlines of what happens when companies make these decisions without empathy. Let's think of a more empathetic way to phrase this that doesn't make people feel like they are disposable assets of the business.

The second quote is — "I just knew I couldn't count on you."

Anyone who throws this line around is spending too much time selfishly complaining about their own lives and responsibilities and not enough time internally reflecting on the why: why is that friend absent from events, why isn't this working, and then what action can be taken to enable both of us to succeed? Even in the most empathetic environments, we don't always know the battles being fought, the energy drained to do the basics, or the vitality some struggle to find every day. It's a continuous exercise in developing and displaying empathy that will lead to trust, openness, understanding, and compromise. (A little kindness goes a long way too.)

Anyone who throws this line around is spending too much time selfishly complaining about their own lives and responsibilities and not enough time internally reflecting on the why: why is that friend absent from events, why isn't this working, and then what action can be taken to enable both of us to succeed? Even in the most empathetic environments, we don't always know the battles being fought, the energy drained to do the basics, or the vitality some struggle to find every day. It's a continuous exercise in developing and displaying empathy that will lead to trust, openness, understanding, and compromise. (A little kindness goes a long way too.)

The Resolution

Empathy can be hard for some; we can't have a genuine conversation about empathy without acknowledging the amount of personal effort some folks have to put in to develop into an empathic person. Likewise, some organizations don't seem to be as focused on empathy as a foundational building block of culture as others. Let me conclude this section with some recommendations on how to increase your personal empathic behaviors. Keep in mind these recommendations are 100% useless if you are not being honest with yourself—think of each point below as a sliding scale increasing in complexity over time, not a box to check.

- **Assess your current state.** This is an important starting point. If feelings and emotions, in general, make you uncomfortable, or even if they don't, this will take a lot of honesty, introspection, and realism to complete. It can seem paradoxical to turn inward to assess a capability that involves turning outward, but this will be an important baseline to refer to in later steps. You can also keep this step very personal to begin with; think back to an interaction with a close family member or friend and assess the empathy you demonstrated in that moment: how much time did you spend in that interaction actively listening and relating, compared to reacting, deflecting, and turning the conversation towards your interests, problems, or opinions?
- **Validate with a trusted source.** This could be where it gets awkward real fast. If you have gone through the process of assessing how empathetic you are—your own honest and genuine conclusion based on evidential experiences—validate those findings by talking to someone you trust. Ask them to assess how you were perceived in a particular situation where you felt you were showing empathy. They will either validate and you can continue in your personal empathy development, or they might share some honest perceptions that can be unsettling and cause you to return to step one above.

- **Scenario-based internal practice.** This one is low stress, low pressure, and can be done anytime and anywhere. Watching your favorite movie or television show? Put yourself in the shoes of the protagonist—or even the antagonist—and turn inwards to see how you feel being in their mind. Think about the last customer you interacted with, and based on what you know about them, think about what they are experiencing: their frustrations with your product or service added to the potential pressure for them to meet targets that your product is supposed to enable. The good news with scenario-based internal practice is you are not yet putting yourself in vulnerable positions—similar to how professional athletes visualize their performance before their execution, this process gives you a chance to visualize how you think and react without the vulnerability that comes with external practice.

- **Scenario-based external practice.** This is where practice becomes execution. You will fail here, and that's okay to accept. Because this is also where some of the best human-to-human, person-to-person connections happen: where relationships are strengthened, where flaws become understood, where people can feel heard and understood, and where the value of our product or service becomes secondary to the unity and trust that we feel—unity and trust that most often lead to friendship and advocacy. This is where you show empathy.

- **Let the empathy you feel drive action.** People crave genuine interactions and the ability to be understood. We might not know what it's like to be a child of war, or have our homes destroyed by natural disasters, but we can turn our thoughts and emotions outward to experience a very small fraction of what it would be like through empathy, which leads to the most important outcome of empathy—action. I would strongly argue that the most impactful outcome empathy can have in our lives is the ability to drive action: we reach out to that customer who we know just lost a family member to let them know we are thinking about them, or we understand the pressure and workload our boss is under and do anything we can to support them. Empathy drives action and while the development of empathy can be very personal, the impact of empathy can influence and unite an entire organization by these small and simple actions.

At some point, we will all get that call in the night and experience the worst day of our life. There are people you are talking to today who may have just received the worst news imaginable: the loss of a child, a best friend who is struggling with mental health, a wayward sister battling addiction—and in those moments, your products don't matter anymore; they can't help the situation. Only you can help by letting empathy drive your actions.
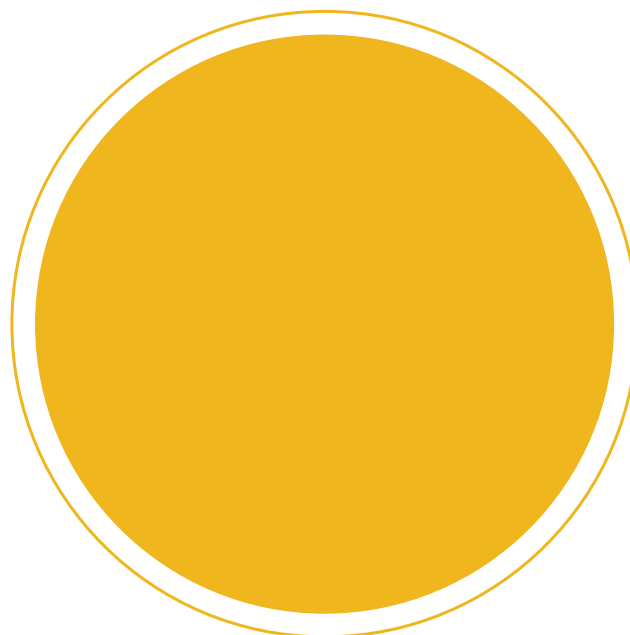
Scenario Based NPS — Metrics Part 2

The Reason

In middle school, I wasn't athletic by any rendition of the word: I averaged about a twenty-one-minute mile, couldn't lift my own body weight, and would have been lucky if I managed a handful of knee push-ups during physical fitness testing in gym class. Despite my lack of strength or stamina, I always loved the idea of dodgeball—it was the first time in gym class where I felt my mind could outperform my physical capabilities with strategy, tactic, and a little bit of whit.

The gymnasium felt more like a battle arena. Encircling the entire basketball court were thick steps of gray concrete, about three feet high and three feet deep. There were four or five of these massive steps that served as seats during official basketball games—from the top row you could touch the ceiling of the gym and look down into the pit the steps created. On the outside walls, only accessible from the top row of seats, were long windows that opened outwards. The only way into the arena was through a long, antiquated hallway that eventually opened directly onto the court.

The day started like any other—picked last by default and stuck wearing a red breathable sleeveless jersey that's two sizes too small. The rules are standard team dodgeball: struck players sit in order of being hit, caught balls allow for teammates to come back into the game, and for games that went on too long, the teacher could call "red line" allowing the teams to get closer before firing. As the whistle blows, in typical fashion, I stand on the baseline, right under the basketball hoop. I watch as my more ambitious teammates charge the front line—some instantly striking our opponent, others instantly being struck. I'm content here for now.

In what seems like the blink of an eye, I'm left alone as the only member of the red team. As I stare at three of the most athletic, agile kids in our class, my teammates cheer me on by yelling random bits of strategy. They still believe in me. Can I actually win? I'm sure the blue team left me for last because I would be the easiest to hit. Why does my team have so much confidence in me? They've seen me do push-ups. They lapped me four times during our warmup run. Now they believe in me?

Lost in my own thoughts, a big orange ball rolls right towards me—easy for blocking. Maybe I can at least delay the game…get them tired for the next round. I pick it up, and before I realize what I'm doing, I hurl it at their weakest player. It glazes his ankle. My teammates erupt on the bench. They do believe in me. I think I can do this. Two on one now.

I back up to the baseline again and find a small ball to defend myself—it's one of those rubbery, dense balls, not ideal for blocking, but the one I really need is twenty feet to my right. No chance I make it there. My opponents huddle up and whisper, plotting no doubt. What's taking them so long? They both have two balls in hand. Just throw them already. My ankle hurts… and I definitely shouldn't have had that pizza for lunch. Just as they start advancing, the teacher yells, "red line!" That felt planned. Surely my team now knows that I have no chance here. But then why are they getting louder?

My opponents advance and now have me backed into the corner. They look so determined. I gave it a good run—at least my GPA's still higher than theirs. In a moment of haste, one decides to strike—it's a ball coming straight for my chest. It's one of those soft, squishy balls—not a practical artillery choice for the winning strike. I try to block it but instead it lands directly into my arms. The bench erupts again and one of my teammates rushes back into the game. I toss her the ball that I just caught, and without hesitation, we rush the remaining player—I go low, she goes high. We both make contact, and in an instant, we are swarmed by our teammates.

Those of you who are connected with me on social may have heard this story before…but what you don't know is what happened during the subsequent games: struck easily, first, and hard, without the possibility of touching another ball for the rest of the block—back to normal.

Do you see the connection to Net Promoter Score (NPS) yet

Keep reading.

The Rant

If you were to have asked my teammates at the very moment they stormed the court, with the adrenaline pumping, having just witnessed the greatest comeback in middle school dodgeball history, "how likely are you to recommend Justin to a friend or colleague?" it would have been a historic promoter fest—10s all around, the perfect NPS, and all champions and advocates for me. Compare that to the score if the same question was asked before, during, or after the last game of the day, with disappointing glares and gazes of disbelief—I'd have some remediating to do.

Think about the scenarios and timing when you choose to ask your customers this question. Think about what the expected versus actual customer experience is at the point in the journey when you're collecting NPS responses.

Let's dive into a few scenarios—

1. Collecting NPS as part of a support survey
I see it all the time in my personal subscriptions—I submit a ticket or contact support for a specific issue and once the issue is resolved, I get the email almost immediately asking how likely I am to recommend their product to a friend. The majority of the time, my response is going to be based on my satisfaction with the support team (Customer Satisfaction or CSAT), how easy the process was (Customer Effort Score or CES), how long I had to wait for someone to respond (First Response Time or FRT), and if my issue was actually resolved in that interaction (First Call Resolution Rate or FCRR). Read that last sentence again—how many times was the product mentioned? That's right, zero. This scenario collects NPS in moments where other CX metrics are the driving factors for the response—not a very telling reflection of advocacy. NPS is already the biggest lagging indicator many CS organizations choose to focus on, but by collecting it as part of a support survey, we are making it even more reactive—the lagging-est laggard of indicators.

2. Collecting NPS during onboarding
The key word here is "during." Why anyone would intentionally choose to ask a customer if they are willing to recommend their product, likely before any value is received, any data connected, or feet are metaphorically wet in the product, is beyond my comprehension. Are we doing this in hopes of the pomp and flash from the days of pre-sale and demos still being fresh in the customer's mind? That the promises of functionality and features we've made will be enough for the customer to report as a promoter? So that we can flash our ridiculously high NPS to the industry for a proverbial pat on the back? Again, think about your personal subscriptions here. You subscribe to a new service and within a day or two, before you've had time to fully dive into content or functionality, you get asked if you like the service enough to recommend it to someone else. How are you supposed to know? You only just subscribed. At best, you're giving your response based on first reaction and again...first reaction is not a good reflection of long-term advocacy. (For the record, I'm totally fine with collection of NPS post-onboarding. There are at least some rationalizations to make for that scenario and tracking that can be done to see how it changes over time, and how certain variables can impact NPS—a solid baseline NPS for a customer seems rational and that can only be truly and accurately captured after onboarding is complete.)

3. Collecting NPS at the time of churn
This one seems obvious...but believe it or not, it happens. I'm all for a post-churn survey to understand your customer's reasoning behind leaving your service or product offerings behind; collecting feedback from churned customers can help us better understand and identify churn risk factors and how they relate to other variables in our customer's experience— we need to understand why they're leaving and what led to that decision. With that information at our disposal, we can establish and iterate on thorough risk management plans to mitigate churn based on those leading indicators. I acknowledge that sometimes the reason for churn is summed up to money, a lack of control or budget, or even turnover among stakeholders—but none of those reasons are justification for using NPS in this scenario. Let's imagine for a moment that we diligently collect NPS at the time of churn, and the majority of customers report as detractors or passives. The action that would turn these detractors to promoters at the point of churn wouldn't come from your NPS motions to remediate—they would be part of your overall risk management plan. And even in the scenario where you identify promoters based on exit NPS, what are you going to do with that data? Do you want advocates and champions promoting your product or service who don't even use your product or service? It's not a very strong testimonial if it's coming from someone who found a reason to take their business elsewhere.

4. Collecting NPS intentionally at customer high points

If you have an automated NPS survey set up based on a customer meeting a specific positive milestone, like Time to First Value (TTFV or TTV), you are intentionally skewing your NPS scores; other than puffing up our numbers and serving our own bias, there is no value that your customer is receiving by collecting NPS in these scenarios. If the goal of NPS is to help identify advocates and champions of your brand (which it is), and you are only measuring NPS when the customer has a positive experience, you aren't collecting a score that adequately captures their complete view of your product or service. You are capturing their sentiment based on their current condition, which could be more likely to fade if it is only capturing the emotional response based on the specific positive milestone. Think about these two scenarios: "Sweet, I've got all my data connected. Yes, I recommend your product!" versus "Oh, I didn't realize it couldn't do that. How am I going to make this work?" You are essentially asking my teammates how likely they are to recommend me based on my one fantastic game of dodgeball—the first game of the day versus the last.

5. Collecting NPS for customer health scores

This one is going to be controversial but hear me out. Let's think about it logically for a second: we all agree that NPS is generally a lagging indicator—it's reported after an event or usage of our product or service, that then impacts the likeliness to recommend that product or service. We know NPS is a very reactive motion, from sending the survey to potentially actioning or remediating well after the event of causation. So, why would we want NPS scores in a customer health model that is intended to be proactive and identify risk factors that indicate customer's not receiving full value from your product before they become a churn risk? It's in our nature to look to the past to plan for the future, but very rarely do I see NPS planned and executed on to the point where it can act as a leading indicator, even a little bit—it just doesn't work. And if we assume scenarios one through four are happening every day in the industry (and they are), we know that we are already skewing our NPS anyway. Why should we compromise our forward-looking customer health scores and lessen the impact they can have on our CSMs' ability to help customers receive value from our products? Just because you have the data available doesn't mean it should be thrown into your health score. Run the model to see the impact and accuracy without NPS. You might be surprised.(If this section leaves you wanting more, don't worry. There will be a future rant specific to health score, but for now I recommend checking out this Customer Success Unlocked webinar from last month with David Sakamoto and Neal McCoy on the topic.)

The Resolution

This rant could go on for weeks if I attempted to thoroughly publish a prescription methodology for effective NPS.

Instead, I'll offer my simple, but effective recommendations that you can implement in your NPS model and methodology today to make it more effective and beneficial to your customers.

- **Stop thinking about NPS as a metric**
  The purpose of NPS is to help identify advocates of your brand—to target champions who receive value from your product or service to spread awareness, ideally in the form of testimonials, to companies who fit your ideal customer profile—becoming intentional and strategic in our implementation and execution of NPS. Viewing NPS as another CX metric to track muddies the potential impact it can have on your organization. View NPS as a means to identify advocates and champions of your brand—nothing more.

- **Remediate, Remediate, Remediate**
  While the purpose of NPS is to identify those advocates of the brand, you will have detractors—if you don't, you're doing it wrong. Keeping the philosophy of brand advocacy front and center, view those detractors as potential promoters. Establish a process to reach out and remediate immediately after the response is received. If you are allowing for comments to be submitted with NPS, read them! It shouldn't have to be said, but there is so much insight in our qualitative data that CS Analysts can analyze to highlight commonly overlooked gaps in process, product functionality, or service effectiveness. Remediate and track progress. Can your organization show the percentage of detractors turned promoters, and how that has impacted revenue generated from, and by, those critics turned advocates based on your remediation process? Probably not. (No scalability arguments are allowed here. There are ways to remediate using automation or tech-touch as a foundation.)

- **Timing, Bias, and Deployment**
  There is no universal answer here, but there are things we can all consider. Before establishing the process for which NPS will be collected—including the how, when, and why—evaluate what's going on in the customer's experience at the point in their journey when you plan to utilize NPS. Try to eliminate any bias that may be influencing the timing and results of your NPS results. Establish an NPS deployment methodology that makes sense for your business but isn't reliant on especially positive customer experiences or experiences where the customer has had to react to any positive or negative scenario. Eliminating all bias might not be possible, but setting criteria for NPS deployment time, like once a month or once a quarter (if the business model supports that timing) will help keep NPS relative to the customer journey. When you decide the timing and do your due diligence to mitigate bias, deploy the NPS survey with two questions maximum: one asking how likely they are to recommend your product or service to a friend or colleague, and an optional place for them to provide qualitative data to justify their response. Don't muddy up the NPS survey. Keep it simple, straightforward, and focused.

- **Advocates and Champions**
  Do you have a process to reach out to promoters to capitalize on their advocacy, as indicated by the NPS results? How many champions of your brand aren't being contacted? My guess is that you have customers today who would be willing to serve as references, provide written or video testimonials, or even serve on a Customer Advisory Board (CAB) because they believe in your products and accompanying services. So, why is no one asking them? You're collecting their feedback and recording their nines and tens, maybe even entering them in a variety of your systems, reporting their high advocacy…but no one is actually asking the questions that require them to take action on those sentiments to represent and promote your brand in the marketplace—close the loop, easy wins, ripe for the taking.

- **Utilize the Matrix**
  If you insist on looking at NPS to assess the health of your customers, at least look at multiple variables to highlight the customers that are truly at risk. The visual below is a very simple matrix to categorize your customers by three variables: Customer Satisfaction (CSAT), Customer Effort Score (CES), and Net Promoter Score (NPS). This can also help with scalability—instead of starting with remediating all detractors, start with poor CES, red CSAT, detractors. Likewise, using this methodology gives you a target set of customers (good CES, green CSAT, and promoters) who are ideal to target for advocacy motions—satisfied and all-around happy customers. The variables should make sense for your business. Just make sure it gives you a focused approach to remediation and holistically assesses your customers.

		CSAT Type				
		Red	Normal	Green	NA	Total
Good CES	Detractor	10	6	100	0	116
	Passive	8	5	200	0	213
	Promoter	500	60	640	0	1200
Poor CES	Detractor	465	45	50	0	560
	Passive	50	75	50	0	175
	Promoter	1	150	175	0	326
	Total	1034	341	1215	0	2590

My one great game of dodgeball in middle school didn't change the fact that I continued to be picked last—even in a college gym class, my reputation preceded me. I was a one-hit wonder, a sequence of luck and convenient timing, a two living a transient life of a ten, and when time passed and the circumstance of the scenario was realized—that the advocacy exhibited for me was misplaced, the time for remediation had passed, and my brand was fatigued, leaving me with a severe case of scenario based NPS. Don't be like me. Don't fool yourself or your brand by collecting NPS at times of high fives and applause. Those tens are actually twos.
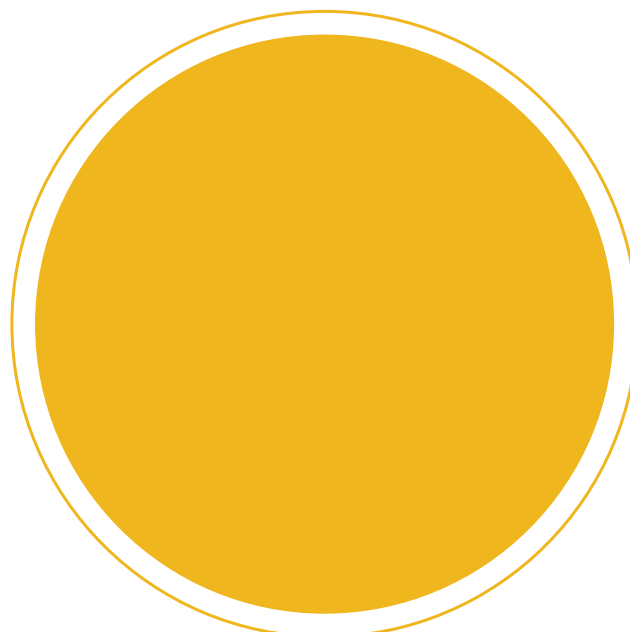
The Chase in Customer Success

The Reason

It's a normal day so far. Pre-pandemic when I went into an office every day. The commute this morning was long—typical combination of traffic and Cincinnati construction. I just got back from lunch with my friend and coworker Gary—double reward points day at our local sandwich shop somehow makes roast beef taste better. I open my laptop and start scanning through the five or six emails that have come in while I was gone; mostly spam—straight to trash. It's such a nice day out. I have a window seat and it can easily make the back half of the day seem endless; it's no aerial view, but at least it's green and we get the occasional deer that graze on by, so no complaints.

My phone rings. It's my mom. I can call her back after I respond to this email—it's a simple request from a coworker, so it shouldn't take long. I look back at my phone just in time to see a text followed by another immediate call from my mom; she only does this when something's wrong. I lock my laptop and go into a conference room to answer. Before I can say anything, I can tell that she has been crying.

"Justin…don't be mad. Your dad opened the door to get the mail and Sox ran outside and down the street. Your brother just went chasing after her."

Sox is the name of our little seventeen-pound Pekingese/Shih-Tzu mix. We didn't pick the name, but we also didn't bother changing it when we rescued her a few years back. My wife dropped her off over at my parents' place this morning for a little play date with their dogs—her friends Jazzy, Lily, and Aria. Sox likes being around them all. She was in the same animal rescue as Aria so she's familiar, Jazzy will snuggle up with anything that has a heartbeat, and Sox submitted to the truth that Lily's queen of the castle and was therefore accepted as part of the pack.

When I say that Sox is our world and our child, I don't say it ironically or metaphorically—Sox has the robust wardrobe, overflowing toy basket, and healthier food than the humans in the house to prove it. She unexpectedly came into our lives at a time when we needed her and filled a void we didn't even know we had. She is perfectly imperfect, with her fluffy tail, floppy and scrunchy ears, and crooked under bite. She will make you the big spoon against your will, steal your pillow in the middle of the night, and disregard any concept of personal space you think you're entitled to.

I hang up the phone and go into complete panic mode, feeling helpless and hopeless. It'll take at least 45 minutes to get to their place with traffic if I leave right now, and the backroads route could knock about five off that time. I power walk back to my desk and start disconnecting my laptop from my three monitors. This is taking too long. Just leave the laptop. I walk past the window of my boss's office and signal I'm leaving. He's on a call. No time to explain. No time to wait.

My parents live on a really busy street. I can't bear the thought of her getting hit by a car, but I can't get the idea out of my head. Even best case where she doesn't get hit while darting across traffic, what if we don't find her before the sun goes down? Where is she going to sleep? What is she going to eat? I'm almost to my car now. What am I going to even do when I get there? Drive around? How long before I should make posters? There is no way I am going to sleep tonight knowing she's still out here. She'll be so confused. I can hear her whimpers in my head. I can see her laying down in brush. That isn't the life she was supposed to have when we rescued her. We were supposed to keep her safe and make sure she always feels loved. I drop my keys as I fumble to unlock the door to my car. Calm down. I can't drive if I can't even see. A panic attack will not help find her. Calm down. Breathe. You're going to find her. She's going to be okay.

I start the car. Why didn't we get her a GPS collar? I've never felt so helpless in my life, knowing that Sox is out there with no understanding of how to come back to us, with no understanding of what went wrong. I want to blame someone. I want to be mad, but what good will that do? I just want to know she's safe. I want to know she is okay. I turn right out of the parking lot, and I get about fifty feet, just before the roundabout, when I see my mom's calling again. This is it. I know it. This is my worst fear. My heart's pounding, keeping time with the cadence of my thoughts. I answer.

"Okay—she's fine, but you're never going to believe this."

My mom's not crying anymore. I sense a relief in her tone but mixed with a bit of hysteria and…humor. She proceeds to tell me what happened—

My dad opened the front door to get the mail and Sox ran outside in the front yard and headed straight for the road. My brother Jeremy, who was shirtless, shoe-less, and had just been in a deep sleep, immediately ran out the door and started running after her, chasing her across the busy road, dodging traffic as his feet slapped the asphalt.

He followed closely for about a half mile down the hill, cutting through yards and hopping fences, watching Sox dart from left to right, right to left before completely losing sight of her. In an attempt to cover more ground, he ran back home to put on a shirt, his shoes, and then got in the car to search in a grid pattern, going street by street, block by block, stopping and scanning—the haze of a deep slumber replaced by the reality of the moment. At that point, my mom called my dad to let him know I was on my way over to help look for Sox and Jeremy continued to drive around. As my dad made his way around the house from the side yard, he stopped in disbelief, hearing a faint jingle in the distance. There, properly sitting on the front porch of their house, with a smile only a dog with a crooked underbite can smile, sat Sox. My dad opened the front door and watched Sox swagger right into the kitchen, tail wagging and eyes slightly squinted, where she sat and patiently waited for her treat, looking similarly adorable to these photos.

The amount of time that went by from the moment Sox began her adventure to the time she sat comfortably on the kitchen floor chomping on her bone?

Four minutes. In four minutes, we went from all-hands-on-deck to all-clear.

So, what would you do in those four minutes? What do you naturally do in the space between chaos and resolution, dissatisfaction and remediation, risk and reward? It's human nature to want to jump into action when something goes wrong—to do everything we can to solve the problem; but there is one truth about this scenario that is indisputable: as soon as the clock starts on those four minutes, the time to prepare has passed and you either execute based on your preparation, or run out the door chasing after a dog with bare feet and no shirt. (No offense, Jeremy.)

The Rant

I see a lot of chasing in Customer Success: chasing metrics that our data doesn't support, chasing insight, chasing answers to the reason customers churn, and chasing a haven of exemplary plays and processes to mitigate risk and drive value. We love chasing the idea of getting ahead of our customers' business problems, enabling them to receive value that helps accelerate their success, and establishing processes based on the customer journey to help prepare for churn risk, poor health, or behavior that would drive the customer away from the value they're looking for.

Before I get too much further into this rant, I do want to acknowledge that we are all on different paths to success with a wide range of maturity in our Customer Success motions...and that's okay—each of our businesses have their nuances that keep us chasing. But without knowing where the chase will take us, and regardless of your maturity level as a CS organization, there isn't time or money enough to be trapped in perpetuity.

So, let's talk about some things we should stop chasing.

1. Stop chasing metrics without documenting the business outcomes they are driving. We hear this a lot, so if you don't know what it means, let's talk.
2. Stop chasing a Customer Success platform that doesn't do what you need it to do. Don't lean on enhancement requests. Know your use case and find the one that meets it.

3. Stop chasing perfection in your data. It's never going to happen.
4. Stop chasing perfection in yourself. That's never going to happen either.
5. Stop chasing a 0% churn rate. You have customers today who probably never should have become customers.
6. Stop chasing validation in your abilities, worth, and expertise. Imposter syndrome is alive and well, but you've got this.
   (Skip to number 9 before reading 7 if this resonates.)
7. Stop chasing reports that don't provide actionable or prescriptive measures. Again, we hear this a lot, so if you're in this boat, let's talk.
8. Stop chasing your analysts and data scientists around with new projects. Get a program manager. I'm not sure where this expectation for data analysts to also manage the entirety of the program came from—same objective, but very different skill sets.
9. Stop chasing self-doubt. You're in your role for a reason. Embrace it. *(If you came here from 6, go back to 7 and read it again on the way back down.)*
10. Stop chasing customers who don't fit your Ideal Customer Profile (ICP). You're wasting your money. You're wasting their time.

11. Stop chasing your definition of value…unless it aligns with your customers'.
12. 12.Stop chasing customer surveys that aren't actioned. You know you have feedback and Voice of the Customer (VoC) metrics that you aren't fully categorizing, analyzing, and actioning to better your product or customer's experience. Read the responses your customers are taking the time to submit.
13. Stop chasing assumed expectations. Clarify with stakeholders—the deliverable, the timeline, the objective. Don't confuse your customer by presenting a deliverable they didn't know they requested.
14. Stop chasing variables in your data independently. Very rarely will it give you a holistic picture of your customer. Hypothesize outcomes and then analyze how variables impact each other in the data you collect based on your customers' behaviors. *(This is Research Methods & Stats 101.)*

15. Stop chasing scenario-based Net Promoter Scores (NPS)—not going to get into that again here, we already discussed that.
16. Stop chasing CSMs for a forecast. They aren't sales.
17. And finally…stop chasing the dog who bolts out the front door. Get a treat, get down to their level, use a calm voice.

The Resolution

There's something to be said for a good chase—a target set off in the distance and the strategic, fast, and sometimes stealthy approach needed to gain ground and finally end the chase to receive the reward. It can help keep us focused on specific programs, projects, or deliverables. But the closer we get to what we are chasing, the further away we are from the starting line.

You might be expecting me at this point to lay out what to chase—where to focus your efforts to make the catch worth the chase. With so many areas to stop chasing, where should we redirect our resources to get the most impactful results?

But the topics are too deep, too complicated, and too important to be a bullet list at the end of a rant. They deserve their own rant.

So, this section ends on a cliffhanger…worth the wait and worth the chase—
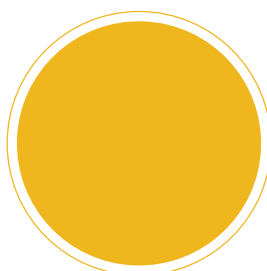
The Chase is On!

The Reason

I'm nine years old, sitting on the long bench in the back of the minivan my parents bought a year or two ago. My older and younger brothers are sitting in their own personal seats in the middle row, my mom in the front passenger seat, my dad's driving. Why do I always get the back seat? Everyone else gets their own little cubbies and cup holders. It's really dark back here—there are hardly any lights along the road. Also, I guess my legs don't need the space that both my brothers' legs need—middle child alert.

Whatever. At least I can lay down back here. But mom says I have to keep my seatbelt on if I do—kind of hurts my side, so I stay sitting up. Dad says we're about to start up some mountain and we're almost there; all I know is, we're on the way to Cherokee, North Carolina for our first family vacation that isn't to visit my great grandparents down in Bowling Green, Kentucky. Don't get me wrong…I love visiting them the few times a year we get to—there just isn't much to do in the middle of the country where they

Now I'm hungry. I shift through the cooler for a snack as I feel the van start to climb a hill; this must be the mountain Dad said we're passing through—or over, maybe? I don't think there's an actual tunnel. That would be cool though. It feels even darker now. I look behind me and it's like someone painted the rear window black. I can't see a thing out of the side windows either. It's actually kind of eerie. I don't like it. I ask my brothers if one of them will trade spots. I'll let you guess what they said. My mom and dad try to scare us with whispers of spooky noises, but I'm not falling for it—at least I can't let them know I'm falling for it.

I lean my back against the seat, finding some comfort in tightening my seatbelt around my waist and chest. I can't even see what, if anything, is on the side of the road. I'm guessing trees, maybe bushes, but we are on a mountain. It could just be a cliff going straight down. I don't want to think about that. The climb up the mountain somehow becomes steeper; I can feel my weight push back against the seat harder as I tighten my seatbelt a little more. There isn't a car in sight and the darkness seems to be darker now. How is that possible? Where is everyone? I'm not really hungry anymore.

Now, when it seems the darkest outside and my family seems the furthest away, I decide to stop looking out into the unknown and instead focus my sight forward. Directly in front of me, I have a straight view through the middle of the van and out the front windshield. In this moment, I can feel the image being burned into my mind—the brightness of the headlights chasing away the night, lighting the road ahead of us as we cut through the darkness. I loosen my seatbelt and lean forward a little bit to see the reach of the light in front of us. I can't believe how bright it is up there. The curves, the turns, the trees on the side of the road (yes, trees—not cliffs), it's all so clear. I feel a sense of relief and safety. I can actually enjoy the ride now.

Perhaps sensing my relief (and looking for a bit of comedic relief of their own knowing that their spooky whisper noises didn't *really* scare us), my parents throw a new possibility out there—

"It sure would be crazy if the headlights stopped working."

Wide eyed and silent, I lean back against the seat, tightening the seatbelt around my waist and chest.

New fear officially unlocked.

Today, over two decades later, I still think about this experience often: the silliness of my parents in trying to scare us, the darkness that seemed to wrap around the van, the reality that I always got stuck sitting in the back seat. I remember the clarity of the lines on the road as the light passed over them. I remember the sharpness of the dirt mounds and trees on the side of the road as we passed. I remember feeling comfort that my dad was driving—remember, he was a pro. But most of all, I remember the light. I remember the clarity, focus, direction, and safety I felt by the presence of the light; the imagery of the van chasing the light, and the light chasing the dark has never left me. However, while the light gave us the means to see through the night, it was still my dad's decision where to focus that light—and it's this analogous decision that I want to explore.

The Rant

In the previous section, I listed out some common ideas and practices that we should not spend a lot of time chasing, leaving unanswered questions about what is worth the chase in Customer Success. Now, I want to focus on the specific areas we can metaphorically "focus the light on" to make the catch worth the chase. With so many areas to stop chasing, where should we redirect our resources to get the most impactful results in the most efficient way?

Let's dive in—

Chase an assessment of your current state. This one is easy to say but not always fully executed upon. Whether you're a Customer Success leader who just came onboard with a new company or have been in the same leadership role for a few decades—do this exercise. There should be multiple layers to your assessment, but I want to specifically focus on three:

1. **Customer Success Maturity Assessments**

   You need a complete picture of your Customer Success organization's maturity. I hear it all the time—people want to baseline for the purpose of showing future progress, but don't want to or can't adequately measure the variables needed to baseline. ESG offers this service. I'm not here to sell it to you, and I won't go too much into methodology or the offering. But if you aren't thinking about your Customer Success organization with this level of detail, you may not be getting a complete picture of your current state. Even if you don't plan to purchase our assessment, feel free to use our framework as your guide.
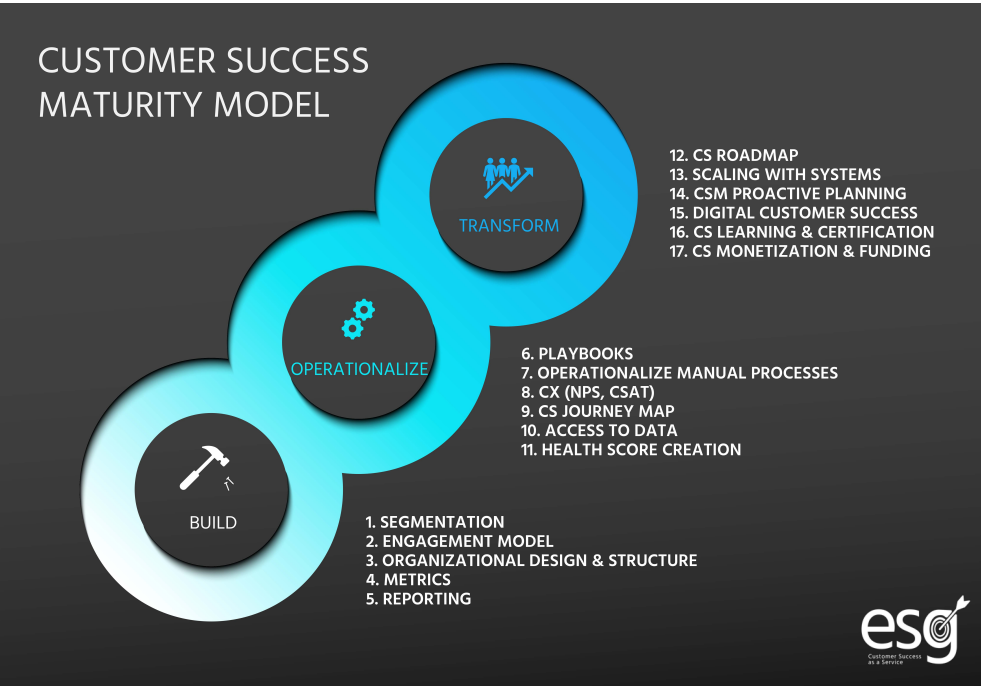
This type of assessment gives you specific areas to focus on—the headlights of the van, if you will—by scoring you in specific categories (based on data points you provide about your business) and providing you a robust report with suggested action items from low scoring categories to mature the business. It can be a little uncomfortable to be as honest and open about your business as an assessment like this requires, but without the vulnerability, you may be left chasing perceived business issues that appear to bigger threats than they actually are. Specific to Customer Success Operation's leaders, ESG offers a free CS Ops maturity assessment that focusses on the CS Ops organization specifically. (It's not salesy if it's free, right?) These types of assessments give you a baseline by specified topics that shine the light on where to focus your efforts based on the needs, resources, and budget of your Customer Success organization.

2. Customer Success Account Coverage Model

I rarely see this done in practice, but the premise is simple: you need a way to see, by geography and segment, the current coverage distribution of CSMs in relation to Annual Recurring Revenue (ARR). Below is a snapshot and link to download a very basic, semi-automated report built in Excel that gives you an overall picture of your current customer coverage, with the ability to filter by specific geographic regions.
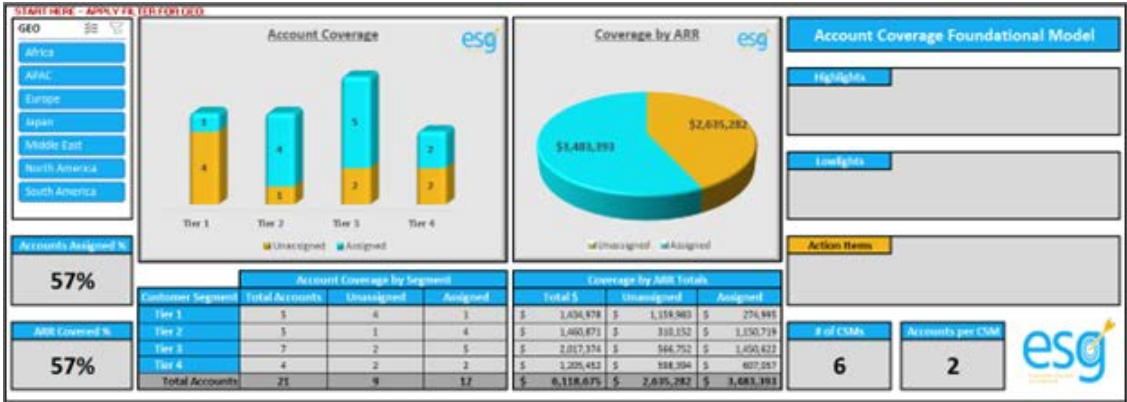
Click here to download the template.
Note: all company names and associated data were fabricated for this template

Using a model like the one above gives a quick view of your coverage and where you should review to potentially reassign CSMs if appropriate. For example, we can see in the example data above that there are four accounts in the Tier 1 segment that have not been assigned a CSM, totaling $1.1M in ARR, while there are two accounts in the Tier 4 segment that are assigned a CSM, totaling $607k in ARR. This is worth investigating. Maybe accounts aren't being segmented correctly. Maybe the assigned accounts in lower segments are big-name brands who could potentially expand quickly with your product or service. Or maybe no one has been paying attention to this basic level of detail and it's clear you need an analyst who can help monitor, report, and investigate abnormalities in the data.

Think about how easy or difficult it would be today for you to get this information. Is it available in your Customer Success tool? Is it in your CRM or your reporting tool? If not, why not, and what insight are you missing by not being presented a clear and concise view of your current coverage of CSMs? Side benefit: this model can serve as a foundation to feed into a future capacity plan or ROI model...actually, that should be the point of this model. Displaying your current state is step one. Making sure you've maximized your current headcount, identified any hiring gaps, and measured those actuals and predicted returns against the full cost of the business is step two. How can you adequately do that without knowing you've got the right accounts, with the right associated revenue, covered by the right CSMs?

3.The Metrics Matrix

A few sections back, I introduced the VoC Metrics Matrix. The concept involved selecting metrics that make sense to your business and plotting the distribution of customers within the matrix to easily identify which customers to target for immediate remediation and which to target for advocacy motions; I also mentioned that the metrics are interchangeable in the matrix to help you focus on an approach that holistically assesses your customer base. To prove that point, I want to show you how you can use the concept of a metrics matrix to assess your current state.

Customer Metrics Matrix

esg

		ARR	Red	Yellow	Green	Total
Top Segment	CSM Assigned	>$1M	6	4	25	35
		$500k-$999k	1	6	1	8
		<$499k	1	10	15	26
	No CSM	>$1M	4	11	12	27
		$500k-$999k	5	6	15	26
		<$499k	0	10	16	26
Middle Segment	CSM Assigned	>$1M	10	6	6	22
		$500k-$999k	0	6	1	7
		<$499k	15	10	15	40
	No CSM	>$1M	10	11	12	33
		$500k-$999k	5	9	15	29
		<$499k	26	10	16	52
Lower Segment	CSM Assigned	>$1M	5	4	9	18
		$500k-$999k	12	24	20	56
		<$499k	30	25	40	95
	No CSM	>$1M	2	4	5	11
		$500k-$999k	5	13	14	32
		<$499k	25	10	30	65
		Total	**162**	**179**	**267**	**608**

Note: all data is fabricated for the example.

The model above is a metrics matrix for your customer base that looks at four variables: segmentation, ARR, CSM coverage status, and customer health. Again, pick these metrics based on what makes sense to your business, but I'm going to stick with these four for the sake of this example. For each cohort of customers in this matrix, there are specific actions that can be taken. Here are a couple examples:

- The six customers in the Top Segment, assigned a CSM, with greater than $1 million ARR, and red customer health, could be low hanging fruit. Your CSM likely knows why the customer's health is red and should be taking action to remediate.

- The four customers in the Top Segment, not assigned a CSM, with a greater than $1 million ARR, and red customer health, however, could mean revenue is at risk for churn.

- The 25 customers in the Top Segment, assigned a CSM, with a greater than $1 million ARR, and green customer health, would be ideal for advocacy or champion motions depending on where the NPS falls—which could also be layered into the metrics matrix.

The purpose of this matrix is to give yourself another tool to visually assess where your customers are falling. Make it robust or keep it simple. Just make sure to look at the metrics that are important to your business objectives to get a true understanding of your current state. Best case scenario, you get an understanding of how your customers align based on selected demographics. Worst case scenario, you realize customers are being segmented incorrectly, CSMs aren't being assigned to the correct accounts, and your health score model is broken. Either way, it is your current state—chase it, catch it, document it.

Chase the ability to be empathy driven. This one's so important I had to say it twice. But unlike an assessment of your as-is state, you'll never fully catch this one—and if you think you have, it means you've actually lost it.

Chase your customer's definition of value. The SaaS and Customer Success industries love talking about value; sellers desire to deliver it and buyers desire to consume it. Both sides understand its importance and impact on performance, revenue, and time. But both sides also seem to define value very differently. If I threw a dart at a board filled with all your customers, would you be able to tell me the specific business problem you are solving for that customer and how your product enables their business? Would you be able to tell me what value you are providing them? More importantly, if I asked that customer what value they receive from your product or service, would your answer match theirs? I'm sure some would, but I'd love to see a metrics matrix that includes that binomial.

So, how can we ensure we are providing value that meets the demands of our customers? (Hint: the answer isn't hidden in your login or usage data alone.)

Here are some suggestions—

1. **Ask them.** I hate when the answer is this simple.
2. **Document it.** Living Customer Success Plans that are shared with the customer are ideal for documenting how the customer's use case aligns to the value that your product or service provides. It could change along the journey, or as they expand. Don't let the Customer Success Plan become outdated.
3. **Track it.** Think of value as a binomial: customers are either receiving value or they aren't. By tracking how and when they recognize value over the customer journey, you can run analysis and compare them to other customers with similar demographics.
4. **Ask them again.** You need their feedback. You need to know what features are providing them value. (Again, just looking at usage data isn't enough to definitively declare value.) Most importantly, this collective feedback from your customers should be the foundation for enhancements or alterations to your product or service.


"Ask.
Document.
Track.
Ask Again."

Chase improvement in yourself and in your product. Don't let impostor syndrome rule you, but also don't be subjective to mediocrity. The Customer Success community is strong and willing to collaborate. Chase after those resources to help you improve as a leader, as a professional, and overall, as a person. Apply that same principle to your service or product offerings. Don't get stuck in a legacy business model that puts the business over the customer, that focuses on dollars over value, and that doesn't chase after continuous improvement and progression. Your data might not be perfect today, but at least it's better today than it was yesterday because of the action you've taken. Your reports might not tell the full story today, but you've written the first few chapters with a roadmap to be executed on in order to finish the book. You might have some customers that aren't good fits, but every new customer that signed this year so far has met the criteria of your Ideal Customer Profile. You might not have a Customer Success tool today, but you have robust reporting built in Excel that is scaling for the time being—and will be easy to display your use case to any vendor you trial when that time comes. Focus on the chase and keep running.

The Resolution

The chase is on!

And while others may choose to chase their data quality issues into the unknown, sprint after a zero percent customer churn rate, or erroneously collect data points that aren't tied to business outcomes, we can keep the high beams on ahead of us by focusing on the small and simple strategies that lead to accelerated transformation and perennial growth.

Chase on, my friends.
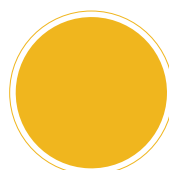
Crocheting Chains — Customer Health Scores

The Reason

While I've enjoyed ranting at you about what I'm most passionate about, this is a good time to pause and tell you a little more about myself. (And yes, I promise there's a Customer Success lesson in here, if you'll just stick with me.)

- My name is Justin Garlock and I'm from a small-ish town called Norwood in Ohio.

- I'm truly an analyst at heart. I over-analyze most things and need to see the data to support most of my decisions in life.

- I'm a drummer. I started playing saxophone in fifth grade, but in sixth grade, I threatened to quit band if I couldn't switch to percussion. It worked.

- My wife, Jenny, is my best friend.

- My dog, Sox, is our boss. We exist only to make her life as comfortable as possible. Also…she refuses to learn how to handshake—but she can spin on her back legs on command so… that's something.

- I graduated with a Bachelor of Arts in Psychology from the University of Cincinnati. I started my college career in the Diagnostic Cardiovascular Medical Sonography program. There was also a time where I thought for sure I'd be an English professor—I used to get to class early to stand in front of an empty classroom and pretend to teach…was only caught once.

- I'm a true crime enthusiast—it keeps me grounded in the reality of the unsettling things and people that can lurk in the corners of a world I choose to see through naïve eyes. Name a true crime podcast and it's very likely that I've binged it. Name a case and it's almost guaranteed I have a strong opinion about it.

- Tennis and hockey are my sports. I could watch/play/talk about tennis all day. (Fedal for life!) And hockey has always been a part of my life, despite not being able to play—I could never get the skating thing down, but at least my fantasy hockey game is strong. I'm also the guy who watches a game and points out everything the broadcasters miss or mess up. It's more fun than it sounds.

- My favorite movie franchise is Rocky. "Yo, Adrian…I did it!" It was the first time I ever saw Jenny cry…it was beautiful.

- I carried around hand sanitizer before it was cool, and a traditional briefcase after it was cool.

- I've always liked organization and order. As a young kid, I would fill notebooks with detailed diagrams of how I planned on reorganizing the furniture in my room. As a somewhat older kid, you could find me assembling and organizing my family's movie collection—first by genre, then alphabetically. Even my drumming style has been described as "too organized," but I stand by it—there is a place for every fill and every fill has its place.

- I never learned how to ride a bike. I know, I know! Stop looking at me like that.

- Writing has always been a passion, but I struggle with being completely satisfied with the content I produce. I had an English professor in college who refused to give 100% on papers because it implies perfection and perfection doesn't exist—he had also only given one 99% in his career. It took until the end of the semester, but I became his second.

- I miss the days when PalmPilots and pagers were cool.

Of all the things listed above, there is one thing that I wish I could confidently say is a hobby of mine today; a hobby that I spent a winter almost a decade ago trying to learn—investing in tutorial books, kits, and supplies—consulting with those who were experts in my eyes based on what they were able to produce. A hobby that is the ultimate way to pass time, especially when technology isn't available. A hobby that has a tangible, useful, and practical outcome. I'm, of course, talking about crocheting.

I can't express the level of excitement and optimism I felt after I learned my first stitch—the chain stitch for the foundation row. Hook, turn, pull. Hook, turn, pull. I've never known such grace and finesse...not even in tennis (and remember, I'm a Fedal guy). I remember watching my hands in admiration as they waltzed in fluency and precision to complete the chain—the ball of yarn noticeably dwindling as the chain grew inch by inch, foot by foot. I'd finish one chain and immediately start a new one: different color, weight, fiber, or type of yarn. But I wouldn't start a new one by starting a new row. I'd literally cut the yarn, tie it off, and start a brand-new foundation chain.

Despite my fascination with the craft, by the end of winter my fingers felt like they were never going to be able to straighten again, and I had quite the collection of chains. See, I was so focused on creating these long chains (and that I could finally say I knew how to crochet) that I never learned how to do the single crochet stitch—a crucial step that essentially begins the next row of the project. I never even tried to learn any other stitches or techniques; I found what I thought worked for me and never did anything differently. To make my situation worse, I learned the hard way (my mother telling me) that it isn't ideal, easy, or smart, to try and sew or crochet chains together using the methodology I used—it's best to execute the single chain stitch and continue the piece of work as a whole. With as many strands of chain stitched yarn as I had, I could have had a nice, albeit small, blanket—at the very least a functional scarf. But instead, I had done nothing and rationalized by telling myself I'd never have to buy shoelaces again.

The Rant

When it comes to customer health scores, we expect a blanket. We expect a customer health model that identifies risk and allows our CSMs to act, triggered by prescriptive data. But in reality, we don't even have our data in a place to collect the metrics needed to create a health score—most of the time all we have is a ball of yarn we're trying to untangle to form the foundation chain needed for the blanket.

To be clear, there is nothing wrong with that: there is nothing wrong with untangling the data and getting it in a place to start forming the metrics needed for an increased percentage of accuracy in your customer health scores. It's where you *should* start. But, you can't crochet a blanket with incomplete or missing rows; it's better to build a foundation chain, then yarn over and hook to start building the second row instead of trying to rig a collection of foundation chains into something practical.

Show of hands...how many of you are letting a tool dictate your customer health scores?

Of those hands in the air...how many of you are confident that *you*, not the tool vendor, have defined what a healthy customer is for you, and have implemented that model into the tool?

Of the remaining hands in the air...how many of you are confident that your data is accurate and that you are using the correct metrics to calculate your customer health scores because your CS Operations team continuously analyzes the contributing variables and adjusts the model accordingly, perfectly eliminating the chance a customer will churn surprisingly and mitigating the possibility for your health model to incorrectly categorize customers?

If your hand is still in the air—nice try but put your hand down. Much like my college English professor's 100% philosophy, perfection in your customer health model doesn't exist.

Much like everything else we do in CS Operations, your customer health score is a process, not a destination. It's overwhelming, especially if you're starting from scratch, and if you have a Customer Success Platform, it can be tempting to go with default settings or recommendations based on industry that may or may not align with your business model. Let's talk about a different approach.

The Resolution

Invest in the needle and yarn. This seems basic, but I want to cover it quickly for the sake of being thorough. You have to take an invested interest in what defines a healthy customer in your organization, regardless of your role. This guiding post will help you as you add, remove, alter, or refine data points that make up your customer health scores. You need someone who will continuously ask and monitor if the variables being considered meet the definition of what your organization defines as a healthy customer. It's never going to be concrete. Someone like a Customer Success Analyst can own keeping a pulse on if the variables in the current health model meet the definition of a healthy customer, on top of addressing data issues and defining metrics. Make that investment.

Crochet the foundation chain. You have to start somewhere. Starting with the foundation doesn't mean your data issues are resolved. It doesn't mean your metrics are all calculating accurately and completely in your Customer Success tool. It means that you've identified the data point that you want to serve as the foundation of your customer health model—a data point that you know impacts your business. It can be as easy as CSM Sentiment or more complex like Customer Lifetime Value (CLTV or LTV)—but only if those data points are readily accessible and accurate. You don't want your foundation to be built on a faulty variable.

And for the record…I hear a lot of debate in the Customer Success community on whether or not customer sentiment should be incorporated in health score calculations. My stance: it's not right and it's not wrong. It's not right if your CSMs don't have a good pulse on their accounts because your Customer Success organization is early in its maturity or if they have a tendency to paint an overly optimistic picture. It's not wrong if your CSMs know their customers well and your organization is more mature. My point is, no matter what data points your foundation is built on, make sure it makes sense for your business model, organizational maturity, and operational capabilities.

Learn the single crochet stitch. The imagery is fantastic: do you want your blanket to be warm, soft, cozy, and maybe a little fuzzy? Or do you want your blanket to be a collection of fuzzy strands of makeshift shoelaces taped together? Don't get overwhelmed or tempted by all strands of metrics you see laying around the organization. Once you have your foundation built, it becomes much easier to add and test variables one at a time than to throw every metric into the equation simply because it exists. Unfortunately, I see this happen more often than I care to admit—metrics exist, and leaders want them utilized. So, without testing, analysis, or reconciling it with their definition of a healthy customer, they throw it in their health score—making it harder for the analyst who'll have to unstitch that quilt.

Integrate advanced techniques and stitches. The number of stitches, patterns, and techniques involved in crocheting that pop up on a Google search is overwhelming—but those advanced variables serve as a perfect example for building on customer health scores. As we layer on additional variables into our models, we need not think linearly. Marketing metrics, community engagement, utilization metrics, support metrics, along with CS and CX metrics can all contribute to a robust customer health score. To any crocheting novice, it may come as a surprise to you that you can combine stitches and techniques all within the same project, creating a more robust, complete, and appealing outcome. Need I say more?

The final stitch. All good things must come to an end. I've never seen anyone at the airport crocheting a forty-foot blanket. You don't need a blanket that big. Likewise, you don't need a customer health score that accumulates forty variables or metrics to give you an output; less and direct with purpose is better than more and ambiguous with irrelevance. Remember, iteration in variables and weighting is ongoing and key as the analysis reveals gaps or insignificant variables in the model.

Alright…time to dust off the old hooks and go get some yarn.
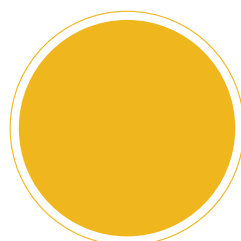
Impossible Shot—Forecasting in Customer Success

The Reason

Last year, I was in a very intense game of Topgolf with two of my friends and colleagues, Sheik Ayube and Peter Armaly (VPs of Business Development and Customer Success, respectively, here at ESG). I want to be completely honest here at the beginning; no extended metaphors or analogies to get this point across. I am *terrible* at golf. I've watched YouTube tutorials, consulted with friends on my grip, and even started watching golf to see if I could pick up any tips or tricks. No impact...still *terrible.*

So, you can understand my surprise and slight uncertainty when I realize I'm holding my own; we're about midway through the game and the scores are relatively close. I only have one strategy—get points every ball, and since the larger targets off in the distance aren't a possibility for me, I am left to focus on the small red, slightly further yellow, or reaching green targets (25, 50, and 90 yards out respectively). Perhaps being somewhat prideful, I don't want to focus too much on the red target, so I try to find a groove with the outer rings of the green target—most of the time trying to hit the ball in the general direction and hard enough for it to roll in the outermost ring. Three points.

Just as I get comfortable in my mediocrity, Peter grabs the hybrid club and decides he is going to win, pulling away from Sheik and I quickly and without remorse. (For the record, Peter said he wasn't a golfer going into the night. Results indicate deceit.) The battle for second place begins.

Sheik shanks a ball or two...then so do I. The final round begins. Two balls per person, except for me. I only have one shot left because I went three in a row in an earlier round—I still think that was a technical issue.

Peter hit the white target almost 200 yards away. Ridiculous. Sheik gets a few points from his first ball, but none from the second.

I grab the hybrid club and look up at the scoreboard. Peter is securely in first. Sheik is in second...but only by five points. As I swipe my club to retrieve the ball, Sheik also notices the score and starts the heckling. One ball. One shot. Six points needed.

Knowing that it was unlikely I'd get six points with one ball, I decide to live or die by what I do next—something that you only see happen in movies or on TV. I place the ball on the tee and position my fingers around the club the only way I know how. I look down at the ball and then glance over my right shoulder to catch Sheik's eye. Without breaking eye contact, I swing my club and make contact with the ball. I'm still glaring at Sheik as he looks past me to see where the ball lands. No blinking. No speaking. His mouth drops as the ball lands in the inner middle ring of the green target. Six points.

I break eye contact only as I drop the club back in its slot and sit down, pretending that is exactly what I meant to do.

We all know the truth here. I got *very* lucky—and if you don't believe that, reference the score from the next game; I couldn't even hit the red targets as I watched Peter and Sheik slug it out for the win. But as I reflect on this experience, I can't help but think about forecasting. (*Stay with me!*)

The Rant

The logic here is very similar to what I shared in the [scenario-based NPS rant](#); just like my one epic game of dodgeball didn't predict advocacy, my one epic golf shot shouldn't be used to evaluate my ability or forecast my next round. They only stand out because these experiences triggered an emotional response that has been sensationalized...by me mostly. From the moment that ball left the tee, I had no idea what was going to happen; the way my body was turned (staring into Sheik's soul), it wouldn't have surprised me if the ball had hooked left and hit the side netting. But by nothing more than chance, the connection was good, the direction was accurate, and I hit my target.

If you've ever been in Sales or been in a position to observe Sales Reps...let's chat for a second.

How many times do you think Sales Reps have closed a big deal, whether it be a big Fortune 100 logo, or a financially significant account, and then instantly had that dreaded pit in their stomach because they know the expectation and forecast for their next quarter was just raised by that historical data point? We love sensationalizing our outliers. We love using the big deals as examples of what should be expected, instead of what they are—anomalies.

Or even better, how many times have those same Sales Reps been asked to review their pipeline and report their sales forecast to management? They likely review the opportunities in the CRM and then scan through their mind for the opportunities they haven't entered in the CRM (*we all know it happens*), and report back a relatively conservative number that is close to their target for the quarter to avoid the dreaded "gap plan."

I don't want any of the above to come across as accusatory. Sales Reps are genuinely trying to do the best with the information they have; the problem is, that information isn't enough. I've yet to speak with a Sales Rep who has, at their fingertips, all the data (historical or otherwise) needed to present an accurate forecast in a structured, complete, mathematical way. Most processes involving forecasting are scrappy, manual, and in desperate need of the two big buzz words: operationalize and automate. As Sales Reps, they're often left with no insight, unremarkable telemetry, and aspirational luck.

So, if Sales Reps aren't adequately equipped to forecast their business, why would we expect Customer Success Managers (CSMs) to be any better equipped, prepared, and enabled to forecast?

I think the answer is simple, but unfortunate: Customer Success is supposed to be proactive in nature, so it's easy to assume better insight into financial gains from customers by those who spend most of their time trying to stay ahead of their customers' obstacles. But the moment we start mandating forecasts from CSMs (rather than measuring, say, Customer Success Qualified Leads (CSQLs), they aren't CSMs anymore—their ability to drive adoption and value becomes dichotomous as they're obligated, and sometimes compensated, to shift focus to selling more.
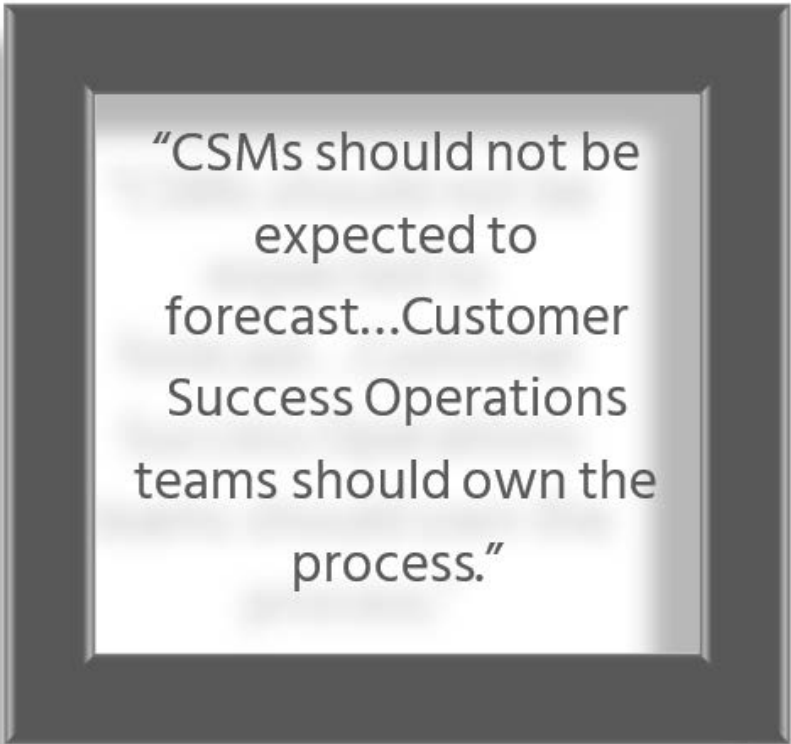
The Resolution

There is no exact science to this forecasting thing—if there was, you'd know about it because of its demand and importance, especially in Customer Success. I've observed and implemented a variety of forecasting techniques in my career—most of them involved looking to the past at historics, assessing the present pipeline, and factoring in some sort of predictive measure of growth. I'm not going to tell you I know which way is right. I'm a firm believer that forecasting is iterative, ever-changing, and never going to be a concrete model that you can implement once and repeat as needed. It will change over time, as new products or services are introduced, and as the company matures.

When it comes to Customer Success and forecasting, there are three big picture principles that we must get right.

1. Customer Success Operations led

This is a good place to start. While forecasting can be challenging for both Sales and Customer Success, the need to provide it has not, and likely will not, go away anytime soon—leaders will always need to know what to expect and when to expect it. So, the question instead becomes: "who owns forecasting?" If my personal stance isn't obvious to you yet, let me provide further clarity here: *CSMs should not be expected to forecast*. Instead, Customer Success Operations teams should own the processes of constructing the methodology of renewal/expansion forecasts, executing the steps necessary to come to a forecast, and reporting it to management accordingly. In yet another shameless plug for the importance of CS Analysts on your CS Operations team…this is what we do: we analyze the data and provide insight, I.e. forecast. This doesn't mean CSMs are completely absolved from the forecasting process. They still have a role to play that I'll get into more detail on in a moment. But CS Ops, and specifically a CS Analyst, should take accountability and responsibility over forecasting for the Customer Success organization. I'd argue no one in the entire organization is in a better place to do so.

> "CSMs should not be expected to forecast…Customer Success Operations teams should own the process."

2. Cross-functional collaboration

I know we've all seen that phrase a lot over the last few years but hear me out. The most successful forecasting methodologies happen when there is complete alignment between teams and stakeholders...specifically Customer Success, Sales, and Finance. I've seen firsthand the metaphorical magic that happens when these teams collaborate during the defining, executing, and reporting of the forecasting process. I've also seen firsthand what happens when they don't—the former much smoother and with fewer enraged emails than the latter. This methodology of coming together to forecast ensures the entire organization is synchronized in a way that everyone's input is heard and considered in the calculation. Regardless of who in your organization officially owns the forecasting process, strive towards this type of alignment, if not in the execution of calculating the forecast, then at least in the spirit of fostering openness and collaboration. In my personal opinion, all organizations (but specifically Sales, CS, and Finance) should have a basic level of understanding of how the forecast is calculated, even if that's contained to management level.

3. Multi-factor approach

When it's time to forecast the next fiscal quarter or year, if you are only looking at how the equivalent variable (territory, Sales Rep, etc.) performed during that same time period the previous fiscal quarter or year to determine the forecast, there is room for improvement. It's a good foundation, but it's certainly not the most complete or accurate way to forecast. We've already reviewed how anomalies and outliers in our financial data can occur, so we need more than historics here. We need a methodology that looks at a variety of factors and variables to reach a forecast. For example, we could run a historical analysis of the data, including growth rates and expansions through upsell or cross-sell, identify impacting variables like employee turnover and new hire ramp up periods, and review the current pipeline. Then run a more qualitative analysis. This is where CSM input and even Sales counterparts can be consulted for additional insight to consider. By running an arsenal of statistical tests and analyzing multiple methods of forecasting, we can very easily get validation in our hypothesis, or quickly realize something's not aligned and should be classified as risk to our forecast or reevaluated for consideration to be included in our forecasting process.

It's nearly impossible to give a complete, prescriptive, and universal methodology to forecasting in Customer Success. Not only is it going to be different in every company, but it's going to change over time in your own business as your data becomes more robust, connected, and accessible across your organization. Your data directly impacts your ability to provide a more accurate and resilient forecast, leaving you less likely to have to stare down the VP of Business Development while swinging away for an impossible shot.
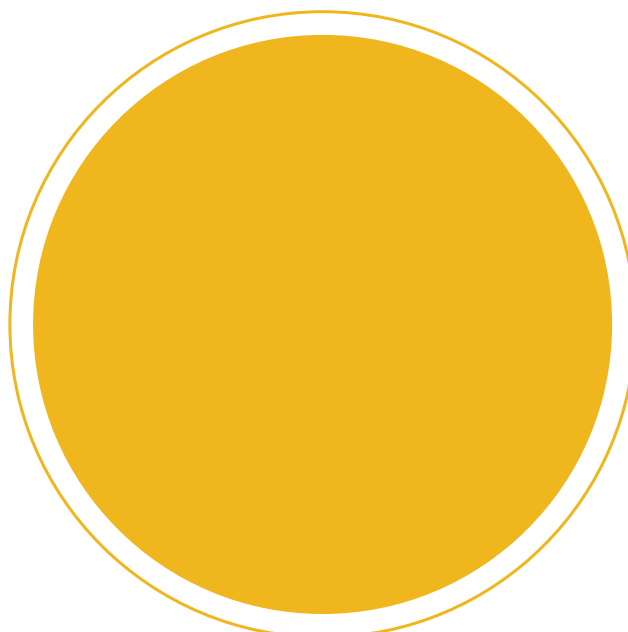
Data-Driven Decisions & Decisions to Drive Data

The Reason

Confession time- I like collecting hardcover books… but not just for the obvious reason of reading them. Don't misunderstand me, I have read a good number of the books on my bookshelves, and of course I have favorites that I'll read once or twice a year. But I also have books in my home that I have not read, some recently purchased, others I've had for years. The reason they're on my bookshelf? It might sound vain, but they look nice; they're the right size, the right thickness, they're hardback, and the right color (jackets removed, of course) to compliment the surrounding decor and make the space feel cozy and aesthetically pleasant. Sure, I'm displaying some books I've never read—but without them, the space wouldn't feel as complete.

I'm also sure that out of those books I haven't read, if I were to read some of them, I might not end up keeping them; despite their perfection in all other ways, they could very well be terrible books with spongy plots, historical inaccuracies, or overzealous antagonists. So, I have to ask myself the question—would I knowingly keep a book like that on display for the sake of appearance?

Of course, I would.

The Rant

How many reports in your inbox or dashboards in your reporting tool look like one of those books? You know the data is a mess, or uses faulty methodology to collect the data, and poor maintenance to update the data. You know how many times you've had to go back to source data to attempt to get clarity on the location of the field. You know those Net Promoter Scores (NPS) are only informed by a portion of your customer base and that you aren't *really* calculating Monthly Recurring Revenue (MRR) correctly. Yet, you keep the book on the shelf—opening it up only to confirm the antagonist is still overzealous and the plot is still porous in later chapters.

Why don't you take it off the shelf?

It looks nice.

I'll never fully understand why we choose to display inaccurate or incomplete data in our dashboards and reports. It's okay to incorporate the data and through that process discover it's inaccurate or incomplete…that's preferred because it means you've actually read the book. What's not okay is not knowing and making data-driven decisions based on unvalidated data that isn't t reflective of the true story.

Data-driven decisions—with how many times we've all heard this phrase over the last few years, how many people actually know what it means? No trick questions here…it literally means making decisions based on supporting data. So why then, for something that's so simply defined and direct, does it feel like we conceptualize it as philosophy rather than a practical, executable approach to maturing the business? Again…the answer is in the phrase. Data.

> "We long for the ability to make data-driven decisions but lack the vision and restraint to make decisions to drive data."

We long for the ability to make data-driven decisions but lack the vision and restraint to make decisions to drive data; we move too fast and overlook basic foundational building blocks in our data, that if we were to slow down to correct, would enable us to be accurately led by our data. Why? Unfortunately, the answer to that question isn't as simple as pomp and circumstance. We have initiatives to drive, objectives to exceed, deadlines to meet, backlogs to prioritize, timelines to accelerate, and value to demonstrate internally to stakeholders and externally to customers.

The Resolution

So, we have two questions to answer—1. How do we make decisions to drive data? 2. How do we practically apply clean, accurate data to make truly data-driven decisions?

Let's start with the former—How do we make decisions to drive data?

1. **Low hanging fruit**
   In a moment, you're going to see some flashy dashboards and data points that may be aspirational compared to your current data structure and capability. That's okay. Start where you are, not where others are telling you to start. For example, if you know your NPS data is solid and complete, build a custom report or dashboard for it. You can (and should) layer in other variables as your business matures. Eat the low hanging fruit while it's ripe instead of stretching beyond your reach to pick the not yet matured apples at the top of the tree.

2. **Decisions to drive data.** The decision to drive towards quality in your data isn't owned by a single person or organization—it's a company-wide initiative. I fully acknowledge that it can be hard to flag data issues. Maybe you don't know who to report them to. Maybe the data stewardship isn't clearly defined. Maybe you only have your direct manager to notify. Regardless of internal politics, start the conversations and move towards action. Data is often viewed as an intangible—you can't touch it so why should you have to fix it? Stop this mentality and work towards resolution, halting the reporting and usage of that specific data point until resolved. CSMs should be flagging and reporting inaccurate or incomplete data. And CS Operations can do even more. We can drive the cross-functional conversations necessary to enable or add fields, define company-wide metrics, and collaborate to establish governance policies where they don't exist before. As CS Operations, we have to decide that we are going to own the initiative and execute, fully recognizing it's an iterative process and perfection is the enemy of good.

3. **External reporting tool.** This one is kind of a sidebar, but a concept that I fully endorse and have seen work well when executed properly. Regardless of what your technology stack looks like, I highly recommend an external business intelligence and visualization tool. I don't care which one. It's likely your company already has access to one of the big three: Power BI, Domo, or Tableau. Leverage it! There are a variety of automation and connection possibilities to operationalize the data ingestion; there is a reason these tools are designed this way. Keeping sales dashboards in your CRM and Customer Success dashboards in your Customer Success platform is fine—I'm not suggesting we stop utilizing the reporting and dashboard capabilities that exist within those platforms. But think about the purpose of CRMs and CS platforms for a minute. The CRM is designed to track and monitor opportunities through the sales cycle. (Of course, there are other features and customization you can create in a CRM, but the main use case still centers around tracking potential spend.) Now think about the use case for Customer Success tools. Regardless of which vendor you choose, the design is to enable insight into the customer to be able to proactively drive value. (That may be a bold understatement, but again...keeping it big picture.) In short, the CRM is the tool for a Sales Rep's day-to-day activity and the CSP is the tool for a CSM's day-to-day activity. So, why are we expecting either of those tools to be adequate to report the metrics we need to the executive level, or even have the data needed to conveniently do so? They can certainly get you part of the way there, but you'll give yourself much more autonomy by turning to the robust features that a BI tool can provide.

Now let's dive into the latter—How do we practically apply clean, accurate data to make data-driven decisions?
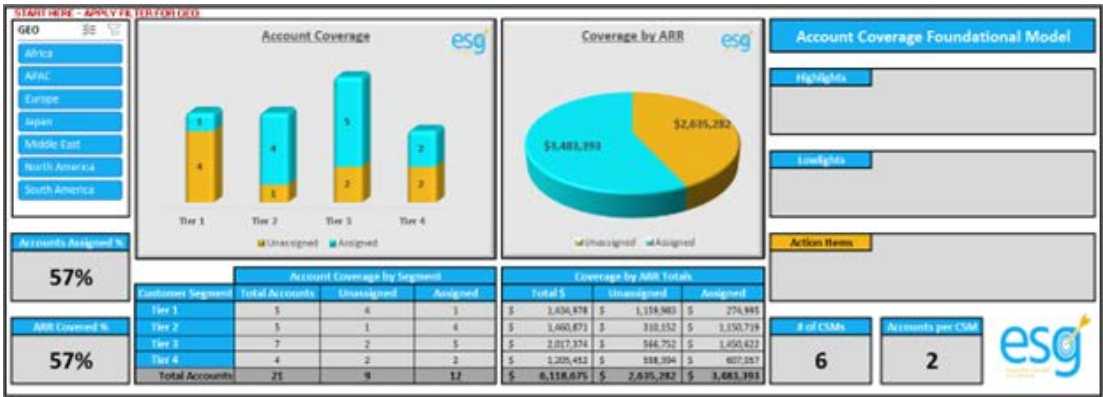
I'm only going to go over some basics here. If you're really looking for a thorough, comprehensive deep-dive into the actual 'how' and 'why' behind the methodology, and the knowledge to execute, I recommend checking out Ed Powers' course on Udemy.

But let's look at some practical application of what it means to make decisions based on data. If this feels foundational to you, that's because it is, but I think we could all use a refresher. It's also best to assume that for the example below, the data has been vetted, validated, and confirmed to be accurate. Take the time to thoroughly digest what you're seeing. The hardest part of this entire exercise is taking the time to read the data. It can be presented in the most clear, crisp format, but you still have to read it before it can inform your decisions.

If you've read these sections in order, these examples should look familiar.

(NOTE: all data displayed in the following dashboards has been fabricated for the purpose of example.)

EXAMPLE 1:

EXAMPLE 2:

VoC – Metrics Matrix					
		CSAT Type			
		Red	Normal	Green	NA	Total
Good CES	Detractor	10	6	100	0	116
Good CES	Passive	8	5	200	0	213
Good CES	Promoter	500	60	640	0	1200
Poor CES	Detractor	465	45	50	0	560
Poor CES	Passive	50	75	50	0	175
Poor CES	Promoter	1	150	175	0	326
Total		1034	341	1215	0	2590

EXAMPLE 3:

Customer Metrics Matrix					
		Customer Health			
	ARR	Red	Yellow	Green	Total
Top Segment — CSM Assigned	>$1M	6	4	25	35
Top Segment — CSM Assigned	$500k-$999k	1	6	1	8
Top Segment — CSM Assigned	<$499k	1	10	15	26
Top Segment — No CSM	>$1M	4	11	12	27
Top Segment — No CSM	$500k-$999k	5	6	15	26
Top Segment — No CSM	<$499k	0	10	16	26
Middle Segment — CSM Assigned	>$1M	10	6	6	22
Middle Segment — CSM Assigned	$500k-$999k	0	6	1	7
Middle Segment — CSM Assigned	<$499k	15	10	15	40
Middle Segment — No CSM	>$1M	10	11	12	33
Middle Segment — No CSM	$500k-$999k	5	9	15	29
Middle Segment — No CSM	<$499k	26	10	16	52
Lower Segment — CSM Assigned	>$1M	5	4	9	18
Lower Segment — CSM Assigned	$500k-$999k	12	24	20	56
Lower Segment — CSM Assigned	<$499k	30	25	40	95
Lower Segment — No CSM	>$1M	2	4	5	11
Lower Segment — No CSM	$500k-$999k	5	13	14	32
Lower Segment — No CSM	<$499k	25	10	30	65
Total		162	179	267	608

Using the individual examples above, think about the following questions for each—
- What stands out to you most?
- Is there anything that doesn't look accurate to you in the data?
- What do you see as the biggest action item from the data presented?
- Are there any data points that contradict your expectations?
- What decisions would you make that are directly influenced by the data?

The tricky part is each one of you reading this potentially answered those questions differently. We all come in with our individual cognitive biases based on our own experiences and prioritized initiatives we are currently working through. Someone focusing on NPS implementation right now may have read example two and completely focused on the amount of work needed to remediate all those detractors. Maybe someone else who is focused on driving advocacy programs for their organization read the same example and was drawn towards the high number of potentially ideal champions based on their overall customer experience. Neither person would be wrong. But neither person would be entirely correct either.

We must look at our data in a more holistic and complete way. We can't pick and choose what we want to pay attention to and what we want to ignore, especially if we know it's quality data. In order to make data-driven decisions, we have to learn how to read the data—and as CS analysts, it's our job to tell that story in a way that mitigates the influence of bias. And although we'll write the story, you need to be the one to read it.
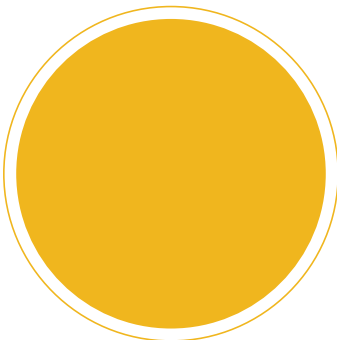
Bungee Jumping and the Adoption Leap

The Reason

The bridge looks old.

It looks to have once been an operating railroad bridge, now reinforced and refurbished to serve its current purpose. My wife, Jenny, and I take our first step onto the bridge and start the trek to the middle; I can see off in the distance where they've set up canopies at what appears to be the bungee jump site. We get about 200 feet onto the bridge before Jenny lets go of my hand—apparently, I'm too clammy, but more importantly... why isn't she? My heart feels like it's going to break my ribcage open and I'm leaving a trail of sweat drops on the wooden boards behind us. But I've never seen her so calm.

They say we're about 300 feet above the water. I don't buy it. I'm convinced I've never stood on any structure this high. At least there are iron gated railings along the sides—and the bridge is a good six to eight feet wide so I should be okay if I hang out in the middle. My feet are sweating so much I can hear my shoes squeaking with each step I take. Hopefully no one else can hear that.
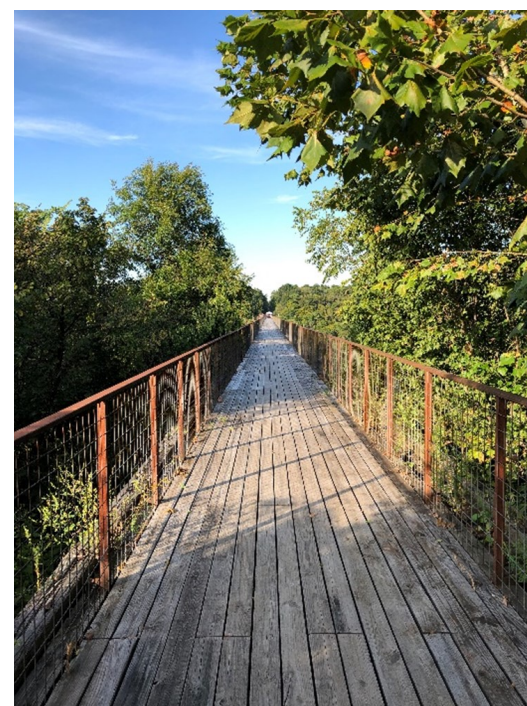
As we reach the jump site, I look back to where we entered the bridge and then over to the opposite side; at least five football fields in length, easy. We were told in our safety briefing that the jump window for this session was about two hours, but it would also depend on when your number was called: there's an order that was predetermined. We could be standing here for ten minutes, or we could be standing here for two hours...and of course, it's the latter. I try to find solace and beauty looking out into the distance, where the hills of green tuck and peak around the curves of the river. It is a nice day.

We watch as person by person takes their turn—Jenny anxiously waiting her turn...me, just anxious. About an hour into waiting and watching, I pay special attention to a larger, taller man taking his turn to jump. I watch as he plunges forward and shrinks as he gets closer to the water. Wait...did he just? No way: my eyes must be playing tricks on me. In about five minutes,he is lifted back up from his jump and what I thought I saw is confirmed.... he's soaked from head to toe. His clothes are drenched. I overhear him tell his family he was completely submerged under water before recoiling. No one mentioned that was a possibility. I look over at Jenny who seems more excited than ever. Did she not hear that? Submerged. Underwater. Completely.

"I bet that would feel good." She is unphased.

This is probably an appropriate time to tell you I'm not the one actually bungee jumping today—Jenny is. It's her 25th birthday and she wanted to do something brave, adventurous, and adrenaline pumping. My personal adventure begins and ends at gathering the courage to stand exactly where I am right now: two feet on the ground...sort of.

We continue to watch and wait. I take note of the diverse preparation, methodology, and execution of the jumpers: some do exactly as the guides are suggesting by looking out at the horizon and jumping forward as soon as the countdown ends. Others are extremely hesitant, and it takes more encouragement from guides and friends for them to jump. A handful need no encouragement and are jumping off backwards. And then some just straight refused to take the leap, despite having already paid. I can't imagine committing that much and coming this far, only to not follow through and take the leap.

It's finally Jenny's turn. She gets hooked up to the cables and is given a quick reminder of how to ensure safety and maximize enjoyment. She looks back at me one last time, smiles, and then turns and looks straight out at the horizon.

3....2....1...

Fearless. Focused. Flawless.

The Rant

As I reflect on this experience, there are two things that I tend to remember more vividly than others—That was the loudest scream I've ever heard come out of Jenny (watch the quick video clip to the right for proof).

The Rant

As I reflect on this experience, there are two things that I tend to remember more vividly than others—

1. That was the loudest scream I've ever heard come out of Jenny. Watch the quick video clip for proof
2. The hesitation of many folks who were committed to take the leap..

How many times have you come across a prospect who is extremely excited about your product or the services you are offering, only to be ghosted? How many times have you watched customers churn early because they (or you discover your product or service doesn't actually solve for their business case? How many times have you seen customers stall or hesitate to adopt and you don't understand why?

For a little bit of clarity, let's dive into this bungee jumping analogy for a moment. There was a lot of preparation (what to expect, what to bring, information collecting (height, weight, medical history, communication (times, dates, locations, and safety briefings (waivers, equipment, jumping methodology that happened before the jump could take place. The relationship between guide and jumper was reciprocal: there was both a duty of teaching and instruction on the part of the guides, and a responsibility to understand and learn on behalf of the jumper. But despite all the preparation that happened up until the moment of the jump, the individual jumper still had to make the decision to leap to get the full value out of the money they spent.

Which brings me to: adoption is more than usage. It's more than ROI. It's more than signing on the dotted line and initiating cash flow. It's more than showing up and logging in once a day. It's more than a high Net Promoter Score (NPS). It's more than enabling customers to use your product. It's more than aligning your product or service to the business objectives of your customer. It's more than just embedding your product or service into a critical role of your customer's operational processes. It's more than bringing awareness to new features or functionalities of your product. It's even more than ensuring your customers fit your Ideal Customer Profile (ICP. Adoption is a totality of all the above that ensures your customers are in the best position to take the leap and adopt your product.

Of all the variables listed above, we as an industry tend to speak of adoption primarily in terms of either usage or value. And of those two variables, value rarely tends to be defined in a measurable way, leaving most organizations to fall back on usage data (which is often partially accurate and siloed at best. Instead of basing adoption on log in data, I would love to see a push in the industry to a more customer behavior-based approach to adoption. What behaviors do we expect customers to demonstrate with our products or services, and how can we measure those behaviors? Sometimes the answer still is found by looking at usage data, but the mindset of focusing on customer behavior as a guide can help get us out of our boxed in approach to adoption.

And remember that adoption doesn't equal value—they're often linked but aren't synonymous. You can receive value out of the money you spent to go bungee jumping but leave determined never do it again, or that you can do it bigger and better next time through another service or location. You may have received a valuable experience but haven't adopted that specific experience, location, or service to be your provider of all things bungee. In the same way, I could receive value out of your product or service for a specific business issue, but that doesn't necessarily mean I'm choosing to adopt your product. I would agree that long-term, sustainable value can contribute to adoption of the product or service. But again, these two are linked, not synonymous.

The Resolution

So, what stops customers from taking the adoption leap? Let me suggest a few reasons:

1.You haven't defined adoption
This one might seem obvious, but you have to define, document, and measure adoption variables in order to know if a customer is adopting or has adopted your product or service. Take the time to define what it means for your customers to adopt your product. Think about the experience from their perspective (this part is key), and what behaviors you'd expect customers to demonstrate in your product.

2.Customers learn of new risks from peers
I wasn't signed up or planning to bungee jump with Jenny that day. But if I was, I can assure you that the moment I saw that man submerged underwater and come back up soaked from head to toe...I'd be out. Your customers are going to talk. And unfortunately (or fortunately, depending on which side you're on), it's mostly the less-than-awesome things about your product or service that will spread like wildfire. Be upfront with your prospects about risks to their use case. They will learn eventually. It's better to be humble now and let them make the best choice for their business, than to force your product or service on a customer you know will likely fail to adopt and end up churning.

3.The money spent isn't worth the experience

I think about those bungee jumpers who were so certain they wanted this experience, paid good money for it, sat through the safety briefing, and went as far as to get hooked up to the bungee cables, with their feet extending off the ledge, only to hesitate and end up walking away without the value and experience they paid for. Take note of the customers that came to your mind as you read that. Maybe they heard your product is clunky and unintuitive. Maybe they realized they could get additional value elsewhere. Once they decide not to leap, don't let them walk off the bridge without finding out why.

4.Their use case doesn't align with your product

I would hope that this would be discovered long before your customer gets on the metaphorical bridge, but the reality often is that a customer's use case is really understood for the first time during implementation and onboarding. These are the 'uh-oh' moments when you realize expectations of what your product or service can do versus reality are not aligned from the customer's point of view. This one is all too common for something we can discover easily before the point of sale.

5.A nice-to-have, not a necessity

I think this where the bungee metaphor ends for me, mostly because I'm totally content living in a world where going bungee jumping is never going to be a necessity for me. But people like me are also not the target audience of bungee jumping tour companies, nor do I fit their ICP. And herein lies the ultimate question to drive adoption: how can your product go from a nice-to-have to entirely necessary for the operational process of your customer's organization? The answer to that question will back you into the variables that are most critical to track to ensure your prospects-turned-customers fully adopt your product or service.

The adoption leap can be scary for customers: the commitment to your product or service, the agreement to be fully engaged in learning and understanding, while still balancing their existing heavy workload, the internal navigations to get approvals and buy-in. They want efficiency. They want ROI. They want a product or service that can accelerate their transformation and help them meet objectives. They don't care about checking a box to say they've "officially" adopted your product. They expect your product or service to meet them where they are and accelerate with them. For your products and services, that means adoption is never truly and completely achieved. It's a continuous process that is driven by the idea that at any stage of the customer journey, and regardless of your customer's organizational maturity, they are continuously ready to take the leap, with you standing by with the video recorder capturing every moment along the way.
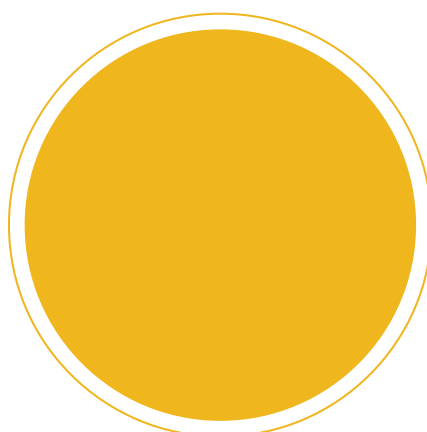
That's a Wrap

Welcome to the end.

We've covered a lot up to this point—

1. The role of Customer Success Analysts and the impact we can have, not only on the Customer Success organization, but the entire company, in bringing cross-functional collaboration and alignment.

2. How to start small with your data integrity issues and the role Customer Success Operations can play in refining data and operational processes.

3. The importance of taking the time to level-set and define the three letter acronyms and metrics that are critical to meeting your business objectives.

4. The role that empathy can play in helping deliver value to our customers.

5. The dangers and risks of using NPS as a scenario-based metric rather than using it to identify champions and advocates of your brand.

6. Some of the unattainable attributes and measures we waste time chasing in Customer Success.

7. Some of the variables and philosophies we should spend time chasing in Customer Success, like an assessment of your current business and maturity state, your customer's definition of value, and the ability to operate and execute with empathy.

8. The importance of a measurable, accurate, and iterative approach to how you calculate the health of your customer base.

9. The relationship and accountability of forecasting in the Customer Success organization.

10. How to make decisions that can drive your data to enable you to make accurate data-driven decisions.

11. The importance of helping your customers adopt your product or service and steps you can take to enable them to recognize long-term, sustainable value.

So, what are you supposed to do with all this information? I've been ranting and throwing practical and tactical approaches at you with some philosophy sprinkled throughout. In today's world, where it's so easy to be bombarded with ideas, information, best-practices, and theory, it can become nearly unbearable to identify what we can actually influence in our Customer Success organizations. Customers want value. We want to deliver value, but also be looking for future opportunity. Customers need reliability. We want to be reliable, but also must make sure we are hitting our goals and objectives. If you're feeling overwhelmed and uncertain about your role in the Customer Success space, not knowing where to start, let me offer you some reassurance—

You are not alone

Despite how 'together' and knowledgeable folks may seem in the industry, I assure you there are struggles and uncertainties happening behind a wall of vulnerability.

Why not you?

If there is one certain thing this blog series has proved, it's that anyone can do this. Anyone can choose to start learning, reading, observing, acting, applying, iterating, and doing. Imposter syndrome is certainly alive and well but each voice in this Customer Success community has something to offer. Use your voice and share. Why *not* you?

Step by step

You aren't going to solve everything overnight. Solve what you can today. Document what needs to be solved tomorrow. Plan. Act. Repeat.

Identify mentors

In an industry where knowledge is so freely shared and is sometimes contradicting, it's hard to know who to emulate. Find mentors who have actually done what you are trying to do: a leader who has built a Customer Success organization from the ground up, a Customer Success Manager who has built loyalty and advocacy in once faulty or churning customers, a Customer Success Analyst who has built customer health models that deliver accuracy to the organization, or a Customer Success Operations Manager who has effectively integrated systems together and established an operational process that drives insight to the organization.

This part is bittersweet for me. If you haven't guessed already, two of my biggest passions in life are analytics and writing. This platform has given me the opportunity to apply both of those passions in a way that I hope has provided insight and encouragement. To that end, I want to close by recognizing the leaders at ESG who have positively influenced me, mentored me, inspired me, and have given me opportunities to expand my knowledge and ability by taking their time and energy, investing it in me as a person first, and allowing me the opportunity to use the things I've learned to make a positive impact in the business.

So to the following leaders. . .

Michael Harnum	Peter Armaly
Ted Hyle	Marley Wagner
Sheik Ayube	Ed Powers

Thank you!

Until next time—rant away, my friends.