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Mastering customer success

## 6 key strategies for driving sustainable business growth

In today's services-led economy, customers are increasingly looking for business partners that they can trust—companies that can be relied upon to deliver with certainty, with whom lasting relationships can be built.

Amidst this changing, competitive landscape, the customer success function has recently emerged as both a significant contributor to customer experience and a critical driver of sustainable growth and profitability. By aligning business strategies and resources with customer needs and expectations, organizations can create a framework that not only enhances customer satisfaction and nurtures long-term relationships, but also converts customer success from a cost center into a profit powerhouse.

Here are six essential strategies that services organizations must implement to elevate customer success and drive sustainable business growth:

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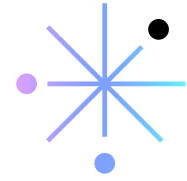
Build a customer success culture

To truly excel in customer success, the executive team must champion a customer-centric culture that permeates every part of the organization. While the customer success function may lead the ongoing relationship with the customer, every employee must recognize their role in driving customer outcomes. Think of it as a shared mindset. A strong customer success culture cultivates collaboration and a shared commitment to client satisfaction, empowering the entire organization to work together to achieve business objectives more effectively.

Digital transformation plays a key role here. By equipping employees with the right tools and information, businesses can bridge gaps between departments, facilitate collaboration, and engage the right resources across the organization to transform customer success into a true team effort.

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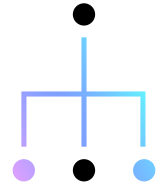
Engage as one team

Customer success is not a one-size-fits-all concept, as it can mean different things to different companies. Indeed, many organizations actually differentiate themselves through the delivery of tailored services. However, for all services organizations, there are some consistent elements that contribute to success, such as working together as one cohesive team.

It starts with the sales team involving their colleagues in customer success early in the engagement and setting the right expectations from the outset. Similarly, involving the delivery teams as part of this process will ensure a seamless transition from sales engagement to ongoing relationship management.

By actively working with customers to collaboratively define what success means for them, clear, quantifiable targets can be established that both parties agree upon. With a structured engagement plan in place, the customer success function can guide customers throughout their entire customer lifecycle—from initial expectations to measurable outcomes. By working together as one team, organizations can optimize resource allocation, improve process efficiency, rapidly resolve problems, and deliver exceptional value to their customers.

3

Leverage the right technology

Having the right IT software and tools enables businesses to eliminate manual processes and disparate data while reducing internal silos. As a customer moves from sales to services to success and support, having one shared system that connects these functions across the entire customer lifecycle facilitates better interdepartmental collaboration.

To achieve this, upgrading from spreadsheets is a must. Organizations should implement an automated system that unifies customer success teams with data from their customer relationship management (CRM) platform. Ideally, this would include easy-to-use digital dashboards that codify each customer's journey—allowing customer success teams to build success plans, develop event-triggered customer playbooks, monitor customer activities and engagement, and evaluate customer health scores more effectively. It should also be able to identify customer risks early, fostering immediate stakeholder responses that avoid the need for "heroic acts of account management".

4

Achieve a 360-degree customer view

Having a 360-degree view of customer activity is crucial for services companies to deliver with certainty. Imagine everyone—from sales and finance to services delivery, customer success, and support—having a complete, consolidated view of the entire customer lifecycle in real time. With end-to-end visibility into customer activity, every piece of customer intelligence can be made available to all interested stakeholders. Without it, different internal functions, pursuing their own tactical objectives, can potentially be in conflict. Imagine a situation where the sales team is attempting to close an upsell opportunity, whilst unaware of the fact that the finance function is simultaneously about to put the customer on a credit stop due to unpaid invoices!

A single source of truth speeds up decision-making and response times. The best way to achieve this is by connecting front and back office functions together to create a unified master customer record. This provides organizations with comprehensive customer insights, including but not limited to multiple revenue streams, resource demand and capacity, potential future work, costs to deliver, and ultimately, total customer lifetime value. Additionally, this 360-degree view empowers customer success stakeholders to manage and scale customer success initiatives more effectively throughout the organization.

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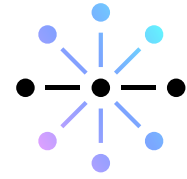
Transform customer success into a profit powerhouse

Modern digital services businesses recognize that the era of 'growth at all costs' is at an end, and that successful companies are increasing their focus on profitability. While catering to customers who renew and expand can be incredibly lucrative, many organizations manage this process using disjointed and manual methods that are inherently inefficient. For forward-thinking services organizations, the key lies in getting visibility into customer activities, optimizing the deployment of the right resources to meet customer needs, and maintaining connectivity throughout the customer lifecycle.

The ultimate goal is to maintain the optimal balance between delivering the best experience for customers, whilst still ensuring effective management of the levers of profitability. One element of this is to transform the customer success function from a cost center into a profit center that acts as a valued contributor to the business.

To achieve this, having the right customer success solution matters. This means adopting a system that eliminates silos and helps to operationalize customer success best practices across all stages of the customer journey. Customer success teams should be able to create outcomes-based success plans, develop best practice dynamic playbooks, and automate success triggers based on customer health scores. Additionally, they should be able to assign resources based on customer needs and transform insights into action, all the while truly understanding the actual cost to service customers.

By focusing on customer centricity, services organizations will not only accelerate time to value, improve customer satisfaction scores (CSAT), and improve net revenue retention (NRR), but also drive increased customer lifetime value (CLV).

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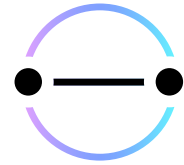
Foster a partnership mentality

A customer-centric organization approaches business engagement as a longer term partnership rather than a mere, transactional vendor-customer relationship. This requires a collaborative mindset that encourages open, honest conversations with customers, allowing success teams to provide constructive feedback and suggest improvements. While these discussions can be challenging, they are vital for adding value and ensuring that customers are on the right path to achieving their goals.

Remember, even though the customer may "always be right", that does not mean that you should be acting as a yes-man! Sometimes, customer success means guiding customers away from ineffective practices toward better solutions. Services companies have a broad range of experiences that they can offer to their customers, including both industry best practices and knowledge from working with other organizations. In addition, they can facilitate networking and information sharing between customers for mutual advantage.

The sign of a mature customer success function is when it is perceived by all parties as a proactive, insightful partnership that delivers value and is worth the investment of time and resources.

Go from organization-centric to customer-centric

In today's subscription-driven economy, becoming customer-centric is essential for success. By prioritizing customer needs and expectations, organizations can transform their approach to customer success—turning interactions into meaningful, mutually beneficial long-term partnerships that boost customer satisfaction and drive sustainable, profitable growth.

Ready to elevate your customer success strategy? Contact us to learn more.

What are you waiting for?

Certinia elevates business growth through a complete Services-as-a-Business solution spanning services delivery, finance, and customer success. Native to the leading cloud platform, Salesforce, Certinia enables organizations to run a connected business, deliver with intelligence, and achieve scalable agility.

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