



The Little Book of Success





**Sue
Farrance**
Head Womble
signable

Sue is Signable's Head of Customer Success. How much experience does Sue have in this area...?

"Experience - every role has customer service/success at its core from Nursing to retail through to SaaS so in all 25 years -(yes -I am old!)"

What's Sue's fav quote relating to Customer Success?

"Customer Service is everything and anything that touches a customer - directly or indirectly. Customer service means servicing customers and it's so much more than just solving problems or addressing complaints. Customer service is part of a holistic customer experience that is capable of providing a critical competitive advantage in today's increasingly cluttered and commoditized marketplace."

- Joseph Jaffe, Founder at Evol8tion

So, why the ebook?

That's simple. There's two basic thoughts here; if we all helped each other a bit more wouldn't that improve our days? And if we're helping one another, that means we're able to help our customers more. It's very much a pay it forward kinda thing.

There are so many great people out there who can, and do, write books on Success. However, I wanted to show how people that work in different industries and who have nothing to gain from each other, can help each other by working towards a common goal. As, in essence, everyone that works in Success already does this with their customers. So we should showcase this more!

The original idea for this book has stayed true. To have people and companies involved that mirrored the ethos that we have here at Signable. Where customers are not seen as just a number and how they are treated is kept at the core for each of the contributors. Customers are the absolute centric part to all of our futures. If this is ignored then the possibilities for growth in your company are going to be

“Customers are the absolute centric part to all of our futures. If this is ignored then the possibilities for growth in your company are going to be limited.”

limited. So take control, focus on a strategy and grow alongside your customers. Success should evolve as your customers and team evolve and never stay static.

For anyone reading that has a true passion for how customers are treated, I hope these articles will resonate. If you can take onboard some of the many ways that our contributors are showcasing how to be awesome at Success, then you are on your way to building a solid Customer Success Strategy. And if you find other areas that work for you then do share them! Others knowledge and the sharing of it is the best resource base we can all ask for.



“Whether or not a person is happy is everything to do with the person and little with your process”

Customer success doesn't mean customer happiness

"How do we keep all of our customers happy?" It's a question that many of us try to decode. I love this question because it comes with a surprising answer; you can't.

You can't make people happy... you make them successful. The side effect of a successful customer is a loyal one. Let your customers be in charge of their own "happy."

Customer Success is Quantitative

Customer Success is measurable. It's tracked through a variety of ways:

- Renewal rates (Retention rates)
- Up/cross sell metrics
- Onboarding metrics
- Survey responses

“Rather being sucked down the customer happiness rabbit hole, track loyalty.”

One of the best ways to understand if your customer is actively successful with your product is to understand your product(s) usage data. The two primary areas to focus on are:

- Log in frequency
- Key feature adoption

Growing log in and adoption rates are indicators that your customer is successfully using your product and may even be ready to buy more from you.

The beauty of usage data is that it's immediately actionable. Customer Success practitioners don't have to rely on end of the month/quarter retention reporting or escalation notices to detect early signs of struggling customers (or even successful customers who are ready to buy more!). Simple email campaigns offering up support, training, or other "how to" content can be a highly effective means to increase adoption.

Customer Happiness is Subjective

"Happy" is absolutely subjective and highly immeasurable. Why? Because happy is a mood and not a metric. To be frank, it's bad news to get in the business of making people happy. There are countless external variables that you can't possibly control.

For example, one of your customers is on track with their onboarding engagement but is enduring a divorce. They may feel negative about everything right now, understandably so. Whereas another customer who is behind in their onboarding engagement just returned from a 2 week Caribbean vacation and may feel positive about their experience with you.

Customer Loyalty Wins

Rather than being sucked down the customer happiness rabbit hole, track loyalty. It's a metric that you can act on and run your business by. By asking the Net Promoter Score question frequently (to all of your end users), you're in a position to track and influence the other elements of your Customer Success strategy:

- Early warning signals
- Detractor sentiment (dissatisfied and/or struggling end users)
- Areas of your product(s) that require improvement
- Customer advocates
- Up/Cross Sell

NPS® is also a metric that will help to get the entire company focused on Customer Success!

About our author!



Keri Keeling

Keri is Head of Global Customer Success Capability for [Oracle](#). Keri's a results-driven Customer Success leader with deep experience in helping SaaS vendors grow their Customer Success team's operations and strategies. With over 12 years of experience, she has built Success teams for companies that range in size from startup to publicly-traded.

Keri's favourite quote around success :

"Success is where preparation and opportunity meet."



- Bobby Unser.



Customer VS Support Customer Success

It should never be customer success vs customer support. Yet, somehow these departments have been separated. They've been separated to showcase customer success as being this proactive, product-driven, revenue generating machine, and left the support department sitting around feeling like a reactive cost center.

Maybe that's down to the leaders of success teams wanting to gather all the valuable pieces of the customer relationship as theirs?

The truth is, there will never be success with customers if you're intent on drawing a line in the sand. Support and Success departments work best in tandem. And understanding their roles, and how that fits into customer experience and delight. Andrew Spittle, Head of Support at Automattic, agrees:

“Great customer support is about being the customer’s advocate”

Customer Success is about ensuring customers get the most out of your product. You are there for onboarding, improving product utilization, and acting as an essential link between the sales and support process. Your goal is to help customers get the most out of the product you offer because this not only helps them succeed in their own goals, it makes them more loyal to you.

Customer support on the other hand is about helping customers understand how to use the product, cater to problems, and get things rolling smoothly again. Great customer support is about being the customer's advocate. You are always there for the customer and you are the expert whenever they need you at their side.

Do success and support complement each other?

The goal of success and support teams are essentially the same: reduce churn and help customers be successful.

The best way to see success and support departments work together is immediately after the purchase and post-onboarding period.

As [75% of all users will churn within 90 days](#), if success and support don't collaborate well in this period, both departments fail to meet business objectives of winning and keeping customers. To make this initial 90 days successful for the customer, success and



Andrew Spittle
@andrewspittle

I fail to comprehend the value in separating Customer Success/Service/Support departments. Our goal's to help people. End of story.

RETWEETS 12 LIKES 40

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The differences between success and support:

There are clear differences between success and support must have a smooth handover. If

this handover doesn't go well, it might seem like the Customer Success Manager has lost interest in the customer and has more important tasks to do.

Customer satisfaction is dependent on success and support working together...

Once the prospect becomes a customer, and during the onboarding period, a Customer Success Manager is heavily involved in getting them setup on their product. Here, the CSM is identifying what the customer needs and why.

The documentation of these customer needs is essential. While it can tempting for a Customer Success Manager to help the customer with everything, it's not their primary role to answer technical queries or help customers configure their software. That's where customer support comes in.

Support and Success should be collaborating at this period. While the CSM is identifying the needs of the customer, they should be assigning a support team member to proactively reach out and provide or offer them specialist help to continue to be a successful customer.

“ Businesses are nothing without their customers. ”

The customer service handover

After this period, the CSM should slowly opt out of contact, but not abruptly. This is where your marketing team and CSM can work together to automate an email campaign sharing best practices on using your product - and if they're sent in CSM's name, it will seem a little more natural.

This is a natural pause point for Customer Success to step back, and the support team takes over. Success has done its job. The customer is setup on the product, it's catering to their needs, and it's become an integral part of their day. They know how to get support from the team, and with the support team setup on the product, it makes for a consistent customer experience in the post-purchase journey.

It's not customer success vs customer support

Businesses are nothing without their customers. If they're truly customer-centric, they have to be obsessed with them, and that means forgoing claiming credit for the relationship they have with customers and think about the bigger picture.

If success and support teams really advocate for the customer, they'll find a better way of working together to help the customer be successful.

For real delight experiences, it's about better internal communication and collaboration. Your customer's experience and loyalty depends on it.

About our author!



Adam Rogers

Adam is a Content Marketing Manager at [Kayako](#), the go-to customer service software to help build and sustain memorable customer experiences.

Adam has been helping support teams deliver effortless experiences to their customers for two years.

Adam's a sucker for an inspirational customer service quote. His favourite is:

"We've had three big ideas at Amazon that we've stuck with for 18 years, and they're the reason we're successful: Put the customer first. Invent. And be patient."

- Jeff Bezos, CEO of Amazon.

Customer delight is the new customer success

Supporting your existing customers in the best possible way to ensure satisfaction has always been and always will be a vital and a core part for any business to be successful and ultimately grow.

However, due to changes, largely in technology, the way we communicate with our customers is very different to how it was say ten or fifteen years ago. Alongside this the role of the person, or people responsible for supporting customer is rapidly evolving.



Many of you will be familiar with the term, **Customer Success**. Customer success individuals and teams are typically responsible for helping customers get real value from your product or service, going beyond the minimum level of support offered in years gone by, and helping them overcome business challenges and meet goals from using your business in some capacity.

“Customer delight means doing both of these but also surprising a customer by exceeding his or her expectations”

If you're thinking; 'brilliant, we already do that', let me introduce you to customer delight. A further evolution in the way you can support your customers.

So what is customer delight and should it matter?

'Customer delight' as the name suggests is a method, or role, within a business that goes beyond simply reacting to customer support queries. It even goes beyond helping customers get value from your product or service. Customer delight means doing both of these whilst also 'surprising a customer by exceeding his or her expectations and thus creating a positive emotional reaction.' ([Scott Gross](#)). It's important for businesses to do this because it's a very effective way to build meaningful relationships with customers, that in turn, will help to grow your business through increased customer LTV (lifetime value), revenue and churn.

A key component of effective customer delight is finding a method to measure your customers perception of your business. Your opinion and your customer's opinion on your approach to

customer delight may be very far apart. One way we do this at Signable is through a short, quarterly survey that's sent to every customer that has given money to Signable. This is known as surveying the Net Promoter Score (**NPS**).

What is NPS?

NPS (net promoter score) is a method of calculating customer satisfaction, loyalty and the relationship between a company and its customer.

How Does NPS Work?

The NPS score is calculated based on responses from one question typically around how likely a customer is to recommend your product or service to a friend or colleague. The scoring of which can be between 0 and 10.

The results: 0-6 - Detractors | 7-8 - Passives | 9-10 - Promoters



Benefits of NPS

NPS requires various business functions to be rigorously, consistently focused on the quality of customer and employee relationships first. Implementing an **NPS** needs a strategic commitment by company leadership, 'because it defines cultural values and core economics that affect every part of the business system' ([Bain & Company](#)).

So there we go...

Hopefully that's given you an idea about how **NPS** works, what customer delight is and how the two link together. Getting started with **NPS** to support customer delight is simple and above all, will provide you some invaluable insights about how to grow your business. All whilst improving customer relationships. It doesn't get better than that, does it?

About our author!



Rob Bluck *signable*

My role at [Signable](#) is to help grow the business, by winning new customers through digital marketing channels. Part of this includes improving processes around how we treat customers by adding value to the relationship we have in order to retain customers

Rob's fav quote relating to Customer Success:

"Authentic marketing is not the art of selling what you make but knowing what to make. It is the art of identifying and understanding customer needs and creating solutions that deliver satisfaction to the customers, profits to the producers and benefits for the stakeholders."

- Philip Kotler



Should success be essential to a business strategy?

As a Fintech firm operating in the stiff-upper-lip, traditional financial market, we were considered to be whizz kid innovators because we dared to allow busy people to sign up their workforce for a pension via their smartphone or tablet in less than half an hour.

“for every 10 per cent increase in customer satisfaction, revenues can increase by between two and three per cent”

While the pensions industry groaned and creaked under piles of legal paperwork and spreadsheets, we dared to think the unthinkable; that one day, workplace pensions could be as accessible as online banking with real-time technology enabling more and more people to engage and save for their retirement.

For us, the essence of good customer service is being agile and providing ease of accessibility and rapid reaction to – but also making the journey affordable and communication transparent.

According to an insight report called The Four Pillars of Distinctive Customer Journeys, commissioned by McKinsey's digital arm, convenience is the most important issue for busy company bosses – and these are our customers;

“Today’s harried customer values convenience. Cutting down the time it takes to complete an individual journey, such as applying for an account, by making it easier and simpler has a deep effect on customer satisfaction.”

The report suggests for every 10 per cent increase in customer satisfaction, revenues can increase by between two and three per cent. That’s important not only for our business but also the long-term health of the public purse.

The report also reveals that ‘transparency of price and fees, ease of communication with the bank, and the ability to track the status of the onboarding process accounted for 42 percent of overall satisfaction.’

Time is an issue for our customers, they are busy running their own companies. So it makes sense that the research revealed that customer satisfaction goes down by 30 per cent if setting up an account exceeds 45 minutes or the ‘satisfaction cliff’. Reduce the time to 15 minutes and customer satisfaction increases by 10 per cent. Bingo.

One of the biggest threats to auto enrolment is lack of engagement. It’s the key to its success. More workers need to save for their retirement because there’s a £28bn pensions black hole. If they don’t, it’s doubtful the state

will be in a position to support them when they can no longer work.

So it's vital we get it right.

“ good customer service is integral to success - and should never be ignored. ”

From our experience, employers want to sign up on a Friday afternoon and have a legally-compliant pension scheme up-and-running by Monday morning. It's entirely possible.

Reacting to that kind of feedback and ensuring our interactive technology can rise to the occasion and then plug in to payroll and accounting software from the word go is how to keep our customers served - and in turn that creates engagement and important industry-wide success.

Success to our customers means their pension scheme simply happens in the background and is simple and efficient to administer.

The endless trail of customer satisfaction polls are testimony to the fact that it matters. According to the semi-annual index from the Customer Service Institute, retail giant John Lewis, famed for its helpful and knowledgeable staff was pipped to the post by online retailer Amazon.com.

The report asks more than 10,000 British consumers to assess their experience of individual organisations they have dealt with in the previous three months, rating the

companies on factors such as professionalism, quality and efficiency, ease of doing business, timeliness, problem solving as well as the obvious complaint handling.

In this instance, online assistance and ease of doing business beat good old fashioned face-to-face discussion.

In a world where a satisfied customer will tell three friends and a dissatisfied one will tell 3,000 via social media, good customer service is integral to success - and should never be ignored.

About our author!



Will Wynne



[Smart Pension](#) was co-founded in 2014 by Andrew Evans, CEO, and Will Wynne, Managing Director, and launched in May 2015. Its platform was built specifically to help thousands of small British businesses sign up their employees to a workplace pension scheme, as required by law.

Will's fav quote relating to Success is:

"Strive not to be a success, but to be of value"

- Albert Einstein.

Smash your success with a content collab!

It's important to work together. From a young age we're encouraged to share and to learn how to work in teams. As adults it's something we insist we're capable of on our C.V's.

Working as a content marketer has meant I frequently work with teams outside of marketing. Creating resource to support all activities and campaigns across a company, leading to many fruitful projects. Illustrating, to me, the value that collaborating brings and that true collaboration means working in teams that extend further than your immediate department. However, this doesn't always transpire as an actuality in the office. Which means teams can start to silo off, preventing helpful information getting from where it needs to go.

First thing - what's siloing?

You've probably heard the term before, but, if you haven't; a silo mentality refers to when different departments don't feel it's necessary to share information across the company, or even to collaborate across teams. Which in turn can lead to misaligned priorities, projects taking longer than they need to from miscommunication and redundant steps in processes. It's basically rubbish. [Forbes backed me up](#) with a comment on the effects of tolerating siloing:

"This type of mentality will reduce efficiency in the overall operation, reduce morale, and may contribute to the demise of a productive company culture"

See.

But it's easy to avoid these turf wars between your departments. All you need is to start fostering an environment where teams are encouraged to share feedback and ideas with each other. Stop the "my department" way of thinking and introduce an "our company" mentality. When this is reinforced by a strong culture and an understanding of what the bigger picture is, employees will feel united by sharing a larger, common goal and reassured by a transparent culture.

“Stop the “my department” way of thinking and introduce an “our company” mentality.”

“Once educated and informed, your users will see the value in what you are doing for themselves. Which means you instill trust.”

So, back to how content and customer success can work together...

Out of all the teams, collaboration should be essential to how Customer Success operates. The Success team have a sound understanding of what clients are looking for. Having to regularly deal with client's problems and recognising what's needed for their solutions. This type feedback is invaluable. Especially when it comes to improving the product or service you provide. And as Content is the resource that educates, both potential and existing, customers on what you do and how you do it - it's quite easy to see how the two teams already share a common goal.

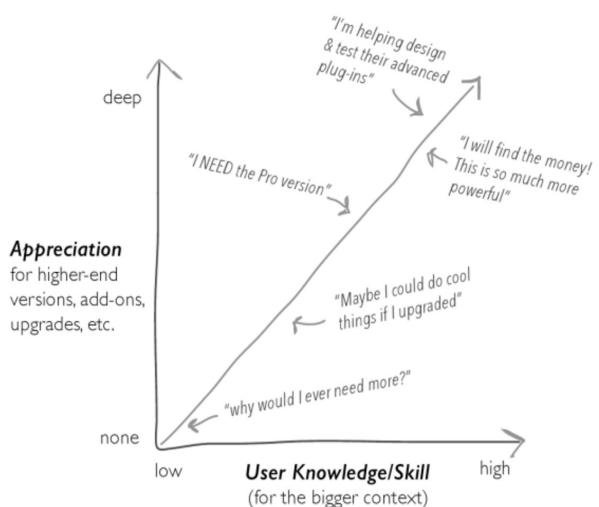
An article from Helpscout titled "[Content Is Customer Success](#)" highlights the importance of educating customers through content as:

"Customers won't see the need for investment in a product if they don't have the experience. Education helps them achieve this expertise"

Which looks a bit like this:

Higher resolution means higher-end products

The better you get at [x], the more *distinctions* you perceive in [x]. Enhanced perception means the ability to appreciate the value of higher-end and/or more advanced versions of products. An audiophile, for example, might perceive a substantial difference between two speaker systems, while a non-audiophile swears the speakers are identical.



The gist of what they're getting at? Your customers won't find the value in what you do

unless you explain the gain; what's in it for them? Why should they trust you?

Once you're working alongside Content you can easily share this info your clients are looking for in a useful format. Need social proof? Success will know the details of a customer who's happy to give a case study. Want a brief to show industry specific benefits? Success can let Content know what each sector is looking for and their individual pain points.

Once educated and informed your users will see the value in what you're doing for themselves. Which means you instill trust. And earning that trust is more important than ever, as today people won't buy from just any business. They buy from real people who listen to what their needs are, who know how to solve their problems and who they can put their confidence in. And as Helpscout put it:

"Don't just show customers what to do, remind them why they should bother."

About our author!



signable

Jessie Davies

At [Signable](#) we help businesses get their documents finalised faster with our electronic signatures. As Content Queen I ensure that our customer's resource for support, educational content and industry updates are always available and clear. I also make sure gifs are plentiful in our [Twitter](#) feed.

Jessie's fav quote about Customer Success:

"The biggest barrier to customer success is CEOs not making it an important part of the culture. It is just as important as new business."

- Nick Mehta, CEO at Gainsight

The Benefits of Investing in Brand Advocates

There are some priceless things in life that money can't buy. Brand advocates are one of them. A brand advocate is a person who talks favorably about a brand or product, and then passes on positive word-of-mouth about the brand to other people. They basically do the best marketing you can imagine for your brand.

There are many benefits of investing in brand advocates. Let's take a closer look at the most important ones for your business.

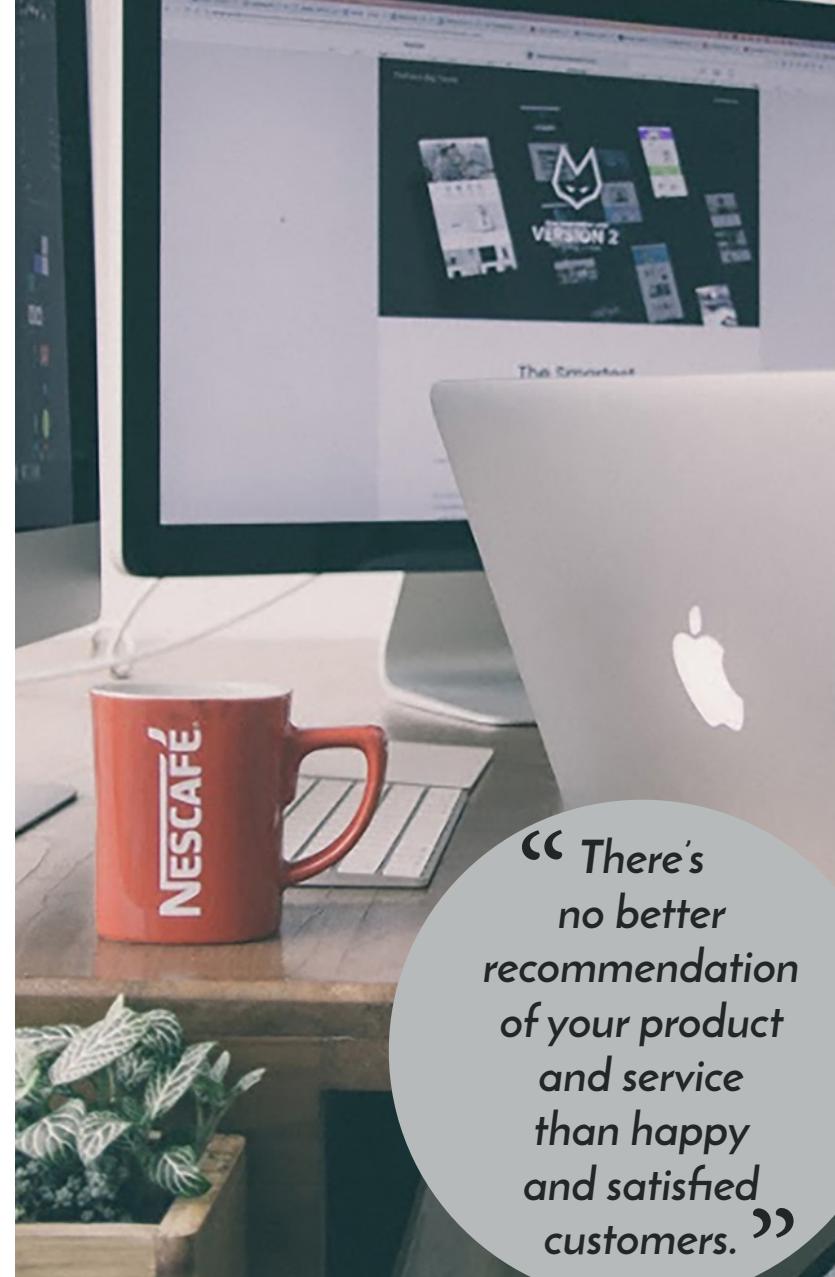
1. Brand advocates generate good word of mouth

Brand advocates like to talk about the products that are useful for them. They recommend the products to their family and friends. There is nothing better than advertisement by people who really love your product. Imagine how passionate and convincing they are when recommending your product and don't forget that their loved ones trust them, that's a totally different level of marketing.

Besides that, there are also a few rules that makes people share word of mouth. Brand advocates are likely to talk about the products they love without any incentive, but I guess you can always increase the activity of your advocates. There are some principles that makes people share content and word of mouth about the products or services.

According to Jonah Berger's book: "Contagious: Why things catch on" there are 6 principles that drive people to share all sorts of things.

Here are 5 of those principles that can trigger



“There's no better recommendation of your product and service than happy and satisfied customers.”

brand advocates to do more word of mouth:

- A product needs to make people look good for using it (social currency);
- People need to be frequently reminded of it;
- It needs to evoke emotions - excitement, amusement or even anger;
- It needs to have a practical value - people share ideas and solutions that proved to be useful;
- It needs to tell a story - If there's an interesting story behind your product, it's likely people will talk about it. They also won't be able to tell a story without mentioning your product.

2. Brand advocates engage in conversations on social media

Brand advocates are the ones who love to be a part of your social media community and share the love for your product.

They use Facebook, Twitter or Instagram to recommend your product whenever such chance

appears. And where can you find a wider reach than on social media these days?

Besides engaging in conversations you create, brand advocates tend to write good reviews. It's priceless for you because most buyers check the reviews online before they decide to buy a product. The more reviews with pictures from real people you have (not bloggers who are paid for advertisements), the better.

It's easy to invest in community marketing, and pay people to write good reviews online, but customers can recognize them. That's why real reviews, not paid ones, are priceless and reliable.

There's no better recommendation of your product and service than happy and satisfied customers.

3. Brand advocates provide valuable feedback

Your best advocates can provide you with great feedback that will help you keep improving your product and service. [The Net Promoter Score](#) is a great tool for gathering customer feedback. It also allows you to reach out to them directly.

People who are happy with your product can objectively tell you what they are missing in it. They want to have an impact on your product development so they're likely to share their ideas and opinion. I'm not saying you should implement everything they want, but their feedback can be an eye opener in some cases, which can help you to make the right choices when it comes to developing new features or products.

4. Brand advocates are loyal to your brand

One of the key success points in business is customer retention. Statistically speaking, the cost of acquiring a new customer costs [five to ten times more than retaining an existing one](#).

Luckily, brand advocates are not going anywhere, at least for now.

You still need to work on your relationship and maybe think of some benefits for your advocates to keep them engaged with your brand.

You can think of managing loyalty programs

and tailor communication special for them. You can mention them on social media - it's a nice recognition. You can also send them gifts, like T-shirts with your company's logo.

At LiveChat, we send hero capes along with handwritten notes to appreciate the great work support heroes do on chat.

Customers are surprised when they get it, they feel recognized and often share their images in capes with us. [Read more about customer appreciation ideas](#).

It's worth recognizing brand advocates

Having brand advocates helps to build credibility, earn trust and gain new customers.

It's worth to nurture relationships with them and show that you appreciate their business. After all, they make a big part of your sales. Repeat customers spend, on average, 67% more than new ones. Keep that in mind and drive engagement and relationships with your brand advocates.

About our author!



Olga Kolodynska

Olga Kolodynska is a Content Writer for [LiveChat](#). She's responsible for preparing articles and monthly newsletters. If she's not working on her newest post, she's probably hiking

somewhere in the Polish mountains. You can read more of Olga's articles [here](#).

Olga's fav quote about Customer Success:

"A customer is the most important visitor, on our premises. He is not dependent on us. We are dependent on him. He is not an interruption on work. He is the purpose of it. He is not an outsider to our business. He is part of it. We are not doing him a favor by serving him... He is doing us a favor by giving us the opportunity to do it."

- Mohandas Gandhi

That's all folks...

That brings our book to a close. Thanks for reading!

Hopefully you've found what we had to say useful and have ideas on how you can incorporate a Customer Success strategy into your business. Or how to make updates to what you're already doing.

Mostly, we hope we've illustrated how a Customer Success strategy shouldn't be overlooked, the opportunities that present themselves when this is included in your overall business strategy and how Success can positively impact not just your customers, but spread into other areas of the business, too.

'Till next time...





L.B.S.