

# Customer Success Assessment

A Guide for Evaluating Customer Acquisition Strategy and Implementation



We Listen. We Craft. We Deliver.



# Customer Success Maturity Assessment

Relationships and customer service trump price and product in purchase decisions.

In today's business environment where innovation is easily copied and differentiation is often slight, the new battleground for competitive advantage lies in the customers' success and the relationships they have with vendors. Customer success over the lifetime of the relationship is the new currency. Success today means consistently meeting the buyer's evolving expectations in experience and value.

A recent CEI survey found that 86 percent of decision makers are willing to pay a premium for a better customer experience yet only 1 percent feel their expectations are consistently met by vendors. The reward for understanding and aligning your organization to the customer is high; studies show that vendors who excel in their customer success strategy see their annual revenues increase by 20 or more percent. For publicly-held companies, their stock prices can increase by 22 percent over a five year period.

The question often asked is not why embrace customer success methods but how and where to begin. This assessment is quick and easy way to determine where your organization is, what needs to be done, and how to get started in a way that delivers quick results.

You do not need to be a customer experience expert to use this 5 minute assessment. However, if you have any questions, feel free to contact any of the people listed on the back page.

# How Well Is Your Customer Understood?

Answering the following questions will help you assess how well your organization understands its customers and prospects as well as how robust your customer success strategy is. If your organization has multiple lines of business or a diversified product line, you may wish to consider these questions separately for each business unit and/or product family.

Put a check mark in a column next to each description. A check mark goes in the 'Yes' column if your organization has fully achieved the attribute described. Check the '?' column if you are not sure of, don't know the status or the activity is performed sometimes. Check the 'No' column, if the attribute is not being addressed. Also place an "A" in the column to note your aspirational goal for each dimension.

## Journey Understanding

<b>Your customer success strategy is based on:</b>	<b>Yes</b>	<b>?</b>	<b>No</b>
Qualitative research for each market segment on the detailed, specific actions that personas undertake in their journey			
Defined the Trigger Events, by persona and market segments, that kick-off a new or repeat purchase cycle			
Defined specific customer expectations, by persona, at each step in their journey			
Gap analysis of expected vs. actual customer experience including identifying disruption points			
Assessment of how trust is developed during the customer journey			
Markets segmented based on multiple attributes and implemented at the target account level			
Demand generation campaigns that mirror the customer journey and use integrated multi-channel techniques to effectively pull the persona along their purchase process			
<b>Score</b>			

Enter the total number of check marks for each column in the Score row.

<b>Assessment of Customer Understanding</b>	<b>We're OK</b>	<b>Needs Work</b>
Journey Understanding		
Trusted Content		
Buyer Enablement		
Competitive Advantage		

Use the space to the left to record your overall assessment of the dimensions listed.

## Trusted Content

<b>Your customer success strategy contains:</b>	<b>Yes</b>	<b>?</b>	<b>No</b>
Quantified annual cost savings from eliminating all content not sought or valued by personas			
Defined and prioritized each piece of content (current and planned) including personas' expected value and use case			
Aligned content to market segments, persona journey steps and channels			
A plan with accountable internal owners to achieve over 50% credibility rating of content by personas			
Content strategy that clearly identifies high value assets with gating rationale documented			
<b>Score</b>			

## Buyer Enablement

<b>You improve customer satisfaction by:</b>	<b>Yes</b>	<b>?</b>	<b>No</b>
Documented and understood target account internal processes, approval checkpoints, and purchase/vendor management protocols			
Aligned Calls-to-Action, tools, and content with tollgates that enable personas to more rapidly navigate internal approval processes			
Established a customer steward team to collaborate, partner, and help personas navigate their lifetime journeys and tollgates			
Engaged personas and partners in product roadmap, product development, and user experience planning			
Customer experience metrics measured at the persona, target account, market segment, channel, and internal group level			
Launched multi-channel personalized (company-based) nurturing programs early in the journey			
<b>Score</b>			

## Competitive Advantage

<b>Your customer success strategy is operationalized by:</b>	<b>Yes</b>	<b>?</b>	<b>No</b>
Basing your brand differentiation on the quality and consistency of your customer experience instead of features and functions			
Continually identifying and removing the root cause of customer pain points, low customer satisfaction/NPS scores, and complaints			
Incorporating VOC and feedback loop mechanisms at each touch point across all interaction channels.			
Actively sponsoring private/public customer social communities with employee involvement to collaborate, problem solve and network			
Brand messaging is outcome-oriented and communicated in language, tone and style tailored to each market segment and persona			
<b>Score</b>			

# High-Level Blueprint to Customer Success

<b>Content Strategy</b>	Status	
	Priority	

<b>Tollgate Maps</b>	Status	
	Priority	

<b>Journey Map</b>	Status	
	Priority	

<b>Lead2Close Maps</b>	Status	
	Priority	

<b>Metrics &amp; Dashboards</b>	Status	
	Priority	

<b>Experience Map</b>	Status	
	Priority	

<b>Business Process Maps</b>	Status	
	Priority	

<b>Technology Maps</b>	Status	
	Priority	

<b>Experience Training</b>	Status	
	Priority	

<b>Employee Engagement</b>	Status	
	Priority	

<b>Organizational Alignment</b>	Status	
	Priority	

<b>Leadership Coaching</b>	Status	
	Priority	

<b>Experience Innovation</b>	Status	
	Priority	

<b>Change Management</b>	Status	
	Priority	

<b>Focus Framework</b>	Status	
	Priority	

<b>Strategic Plan</b>	Status	
	Priority	

**Comments:**

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# What is the Business Impact?

Customer success strategies fail not because the strategy is flawed but from siloed, short-term oriented implementations. As much attention must be devoted to aligning your people, processes and technology outward to customer behavior and expectation as to the strategy itself. The questions below help you to assess the how well your customer success strategy has been made operational to yield significant and sustainable revenue gains.

## Revenue Acceleration

<b>Your customer success strategy has resulted in:</b>	<b>Yes</b>	<b>?</b>	<b>No</b>
A 20% or greater increase in total revenue (net new and repeat business) annually			
Issues are resolved within 24 hours and issue escalation actions are coordinated cross-functionally			
Increase in sales pipeline velocity of 2X for net new customers and 3X for repeat purchases			
Inbound marketing spend is comparable to your industry's best-in-class peer organizations			
Customer experience is treated as business discipline with an executive management 'owner', business metrics and a dedicated centralized team			
Marketing has committed to delivering 50+% of the annual revenue objective			
Sales and Marketing collaborate on account plans by synchronizing customer experience and feedback activities with account timelines			
'At Risk' High Value customers are identified early and treated separately by a cross-functional team that identifies root cause and remediation			
<b>Score</b>			

Enter the total number of check marks for each column in the Score row.

<b>Assessment of Revenue Impact</b>	<b>We're OK</b>	<b>Needs Work</b>
Revenue Acceleration		
Experience Innovation		
Technology Ecosystem		
Customer-Centric Culture		

Use the space to the left to record your overall assessment of the dimensions listed.





## Experience Innovation

<b>Your customer success is sustainable:</b>	<b>Yes</b>	<b>?</b>	<b>No</b>
Customer experience and journey learnings are regular inputs into corporate business and strategic planning			
Customer experiences and interaction strategies are co-created with high-value customers and jointly reviewed/updated annually			
Customer success has a dedicated budget and is part of quarterly financial /business performance reporting packages			
Seamless, connected, target account centric buyer enablement and engagement models have been adopted and include all interaction channels			
Business processes have been re-engineered based on co-created experience maps to consistently deliver customer outcomes and value			
<b>Score</b>			

## Technology Ecosystem

<b>Your customer success strategy supported by:</b>	<b>Yes</b>	<b>?</b>	<b>No</b>
Supporting and enabling technology has been evaluated, gaps identified and closed			
Lead-to-Cash business processes re-engineered to streamline touch points, internal handoffs, and information flows			
Joint ownership by product marketing, line of business owners and digital marketing of all digital properties and content publishing			
Data strategy is aligned to the customer journey, standardized, scored and cleansed			
Predictive analytics are used to identify potential customer issues and to guide escalation and response			
<b>Score</b>			

## Customer-Centric Culture

<b>Your customer success strategy is made operational by:</b>	<b>Yes</b>	<b>?</b>	<b>No</b>
Employee training programs on how to deliver a meaningful and consistent quality customer experience across all touch points			
Demand generation and customer experience metrics are published to the entire organization on a weekly and monthly basis			
Employee compensation and performance programs are aligned to customer success culture values and metrics			
Employee satisfaction and engagement is as important and valued by management as customer success			
New organizational structures are routinely evaluated and implemented to tear down internal silos and align teams to customers			
<b>Score</b>			

# About the Customer Success Assessment

This assessment is based on New Business Strategies' proven Sellers' Compass™ methodology for building enabling, engaging and enduring, profitable relationships. The Sellers' Compass methodology and services offers organizations a step-by-step, proven path to customer success.

Aligning organizations to their customers' journey better equips marketing teams to expand their market. Content marketers will understand what information prospects value and where they go looking for it. Branding can create outcome-based messaging that resonates with buyers. Sales can close more deals faster by delivering the type of interaction prospects value most.

*For help with this assessment, please contact:*

## **New Business Strategies**

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## **About New Business Strategies**

New Business Strategies is a strategy and customer experience consulting firm based in Silicon Valley, CA, and Fort Lauderdale, FL. With a proven track record and methodology for successfully fostering enduring, and profitable customer relationships, we serve clients globally and have contributed to \$2.7B in client value for companies including Oracle, McKesson, Good Technology, DotNetNuke Corporation, and the Great Place To Work Institute. For more information, visit [www.newbizs.com](http://www.newbizs.com)

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