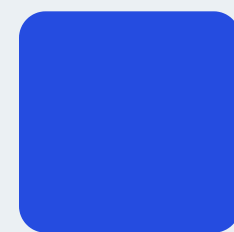


# Is your Customer Success team prepared to scale?

Level 4 - Trailblazer



# Level 4 - Trailblazer

## Description Overview:

**Trailblazer organizations** heavily leverage automation and have operationalized customer data in order to drive business growth, and enhance visibility for their customers and across teams.

## Suggested Areas for Improvement:

### Focus area 1:

Increase collaboration with key customers to achieve strategic outcomes.

### Focus area 2:

Develop a programmatic approach to reporting and analyses on customer data in order to best leverage customer insights when making org-wide business decisions.

### Focus area 3:

Fully integrate automation into every stage of the customer lifecycle journey to enable CSMs to increase focus on expansion and growth opportunities within the customer base.

### Focus area 4:

Leverage customer health scores to templatize customer communication around progress and achievements toward desired outcomes.

Customer Success is increasingly important for B2B companies as more businesses shift the focus of their Go-To-Market (GTM) strategy from traditional top-down sales to retention, expansion, and Customer Experience (CX). Accordingly, Customer Success departments are increasingly viewed as growth- and revenue-drivers by executives, board members, and investors.

This maturity assessment helps Customer Success leaders and executives understand where the market stands regarding operational maturity and benchmark against industry peers.

Gartner Peer Insights and Vitally surveyed 100 leaders who are deeply familiar with their organization's Customer Success (CS) workflows, processes, customer data, and the CS technology stack to understand the varying maturity levels of automation and standardization of CS and support teams across different companies.

#### Level 4 - Trailblazer:

heavily leverage automation and have operationalized customer data in order to drive business growth and enhance visibility for their customers and across teams.

#### Level 3 - Leader:

know the importance of clean customer data, CSM support is somewhat proactive, and CS is easily able to identify churn risks. Customer data is somewhat enriched, and CS processes are defined, documented, and repeatable.

#### Level 2 - Explorer:

working to scale CS efforts as their team and customer base continue to grow. Customer segments are continuing to develop.

#### Level 1 - Pilot:

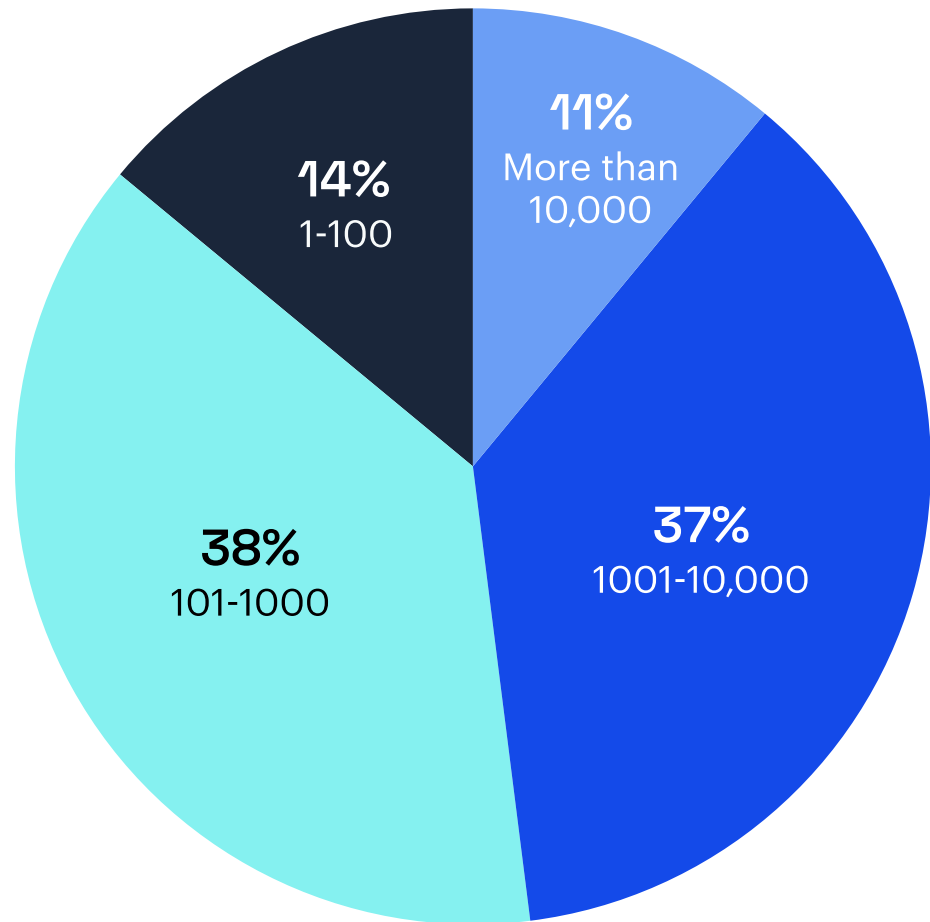
just getting started with building out their CS organization. Customer Success Manager (CSM) support is generally reactive, and CS processes are ad-hoc.

The overall average automation and standardization maturity of the companies surveyed is 2.34 out of 4.

## Our Respondents by the Numbers

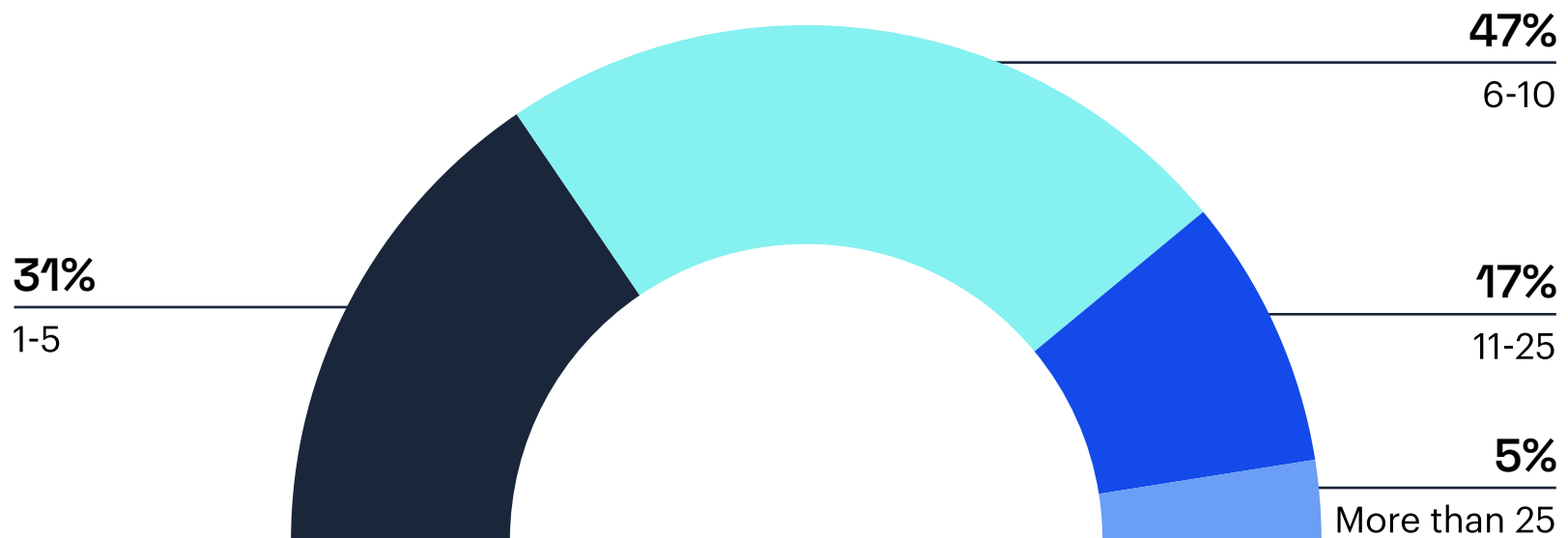
Three-quarters (75%) of respondents service between 101 and 10,000 active customer accounts.

How many active customer accounts do you have?

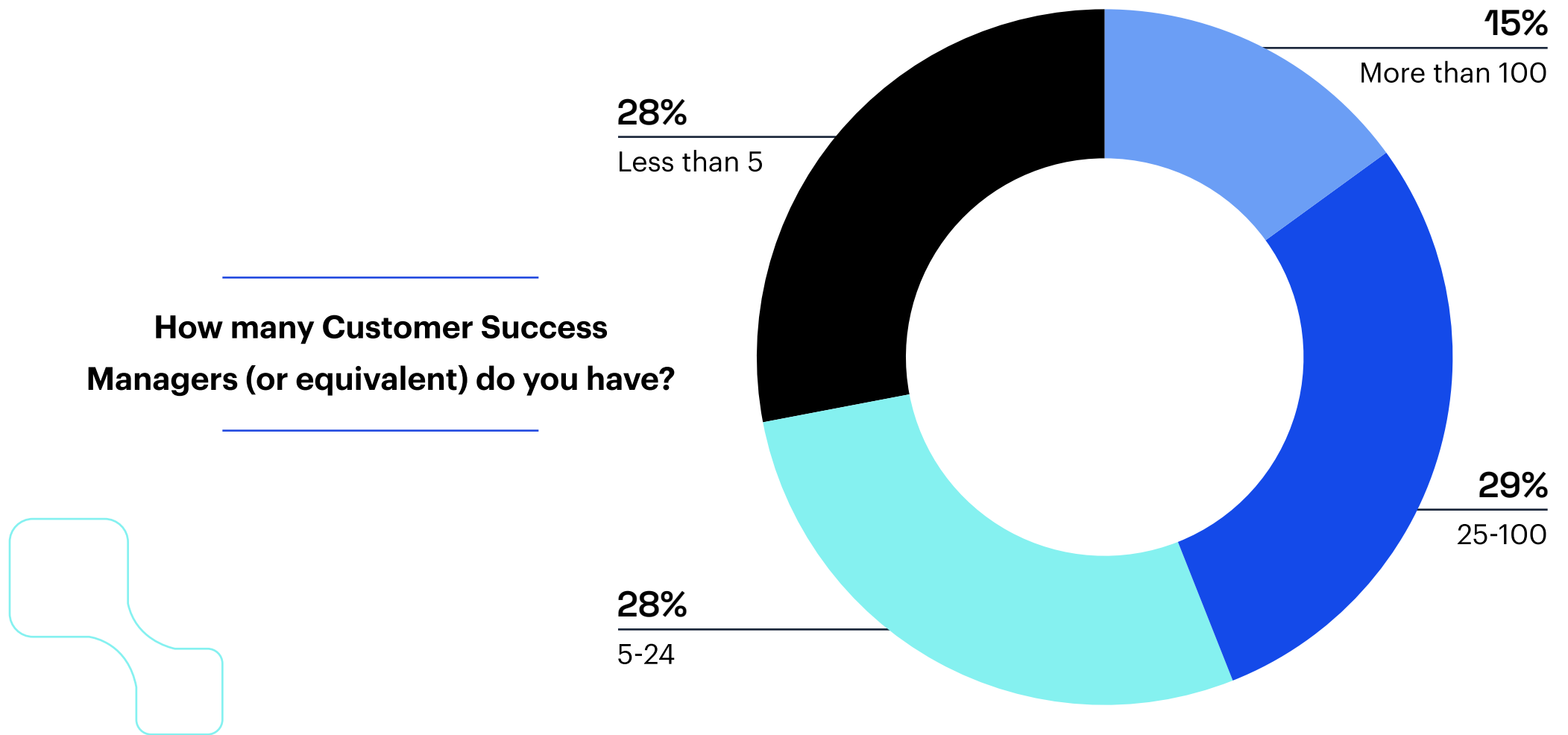


69% have more than 6 users per customer account.

On average, how many individual users are there per customer account?

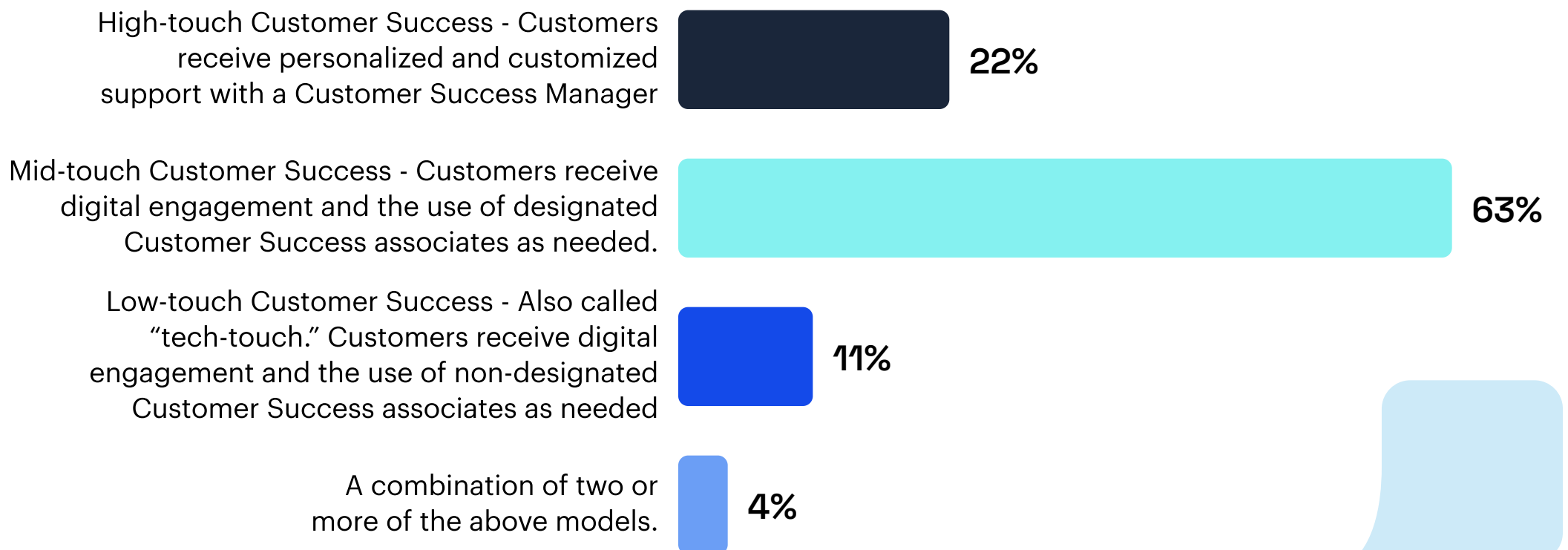


The majority (56%) have less than 25 CSMs at their company.



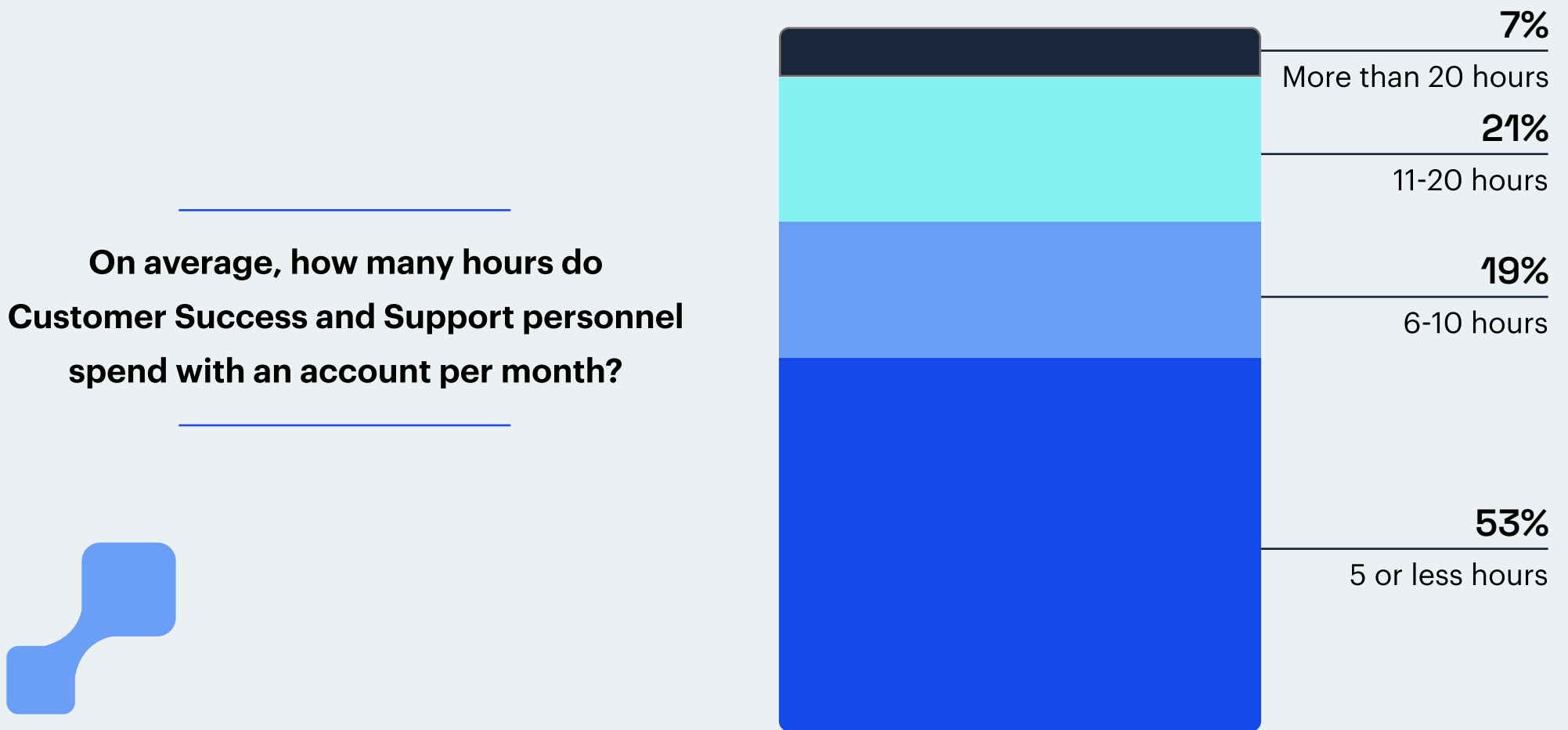
Almost two-thirds (63%) of respondents use a mid-touch CS model where they provide both digital engagement and designated CS associates as needed to their customers.

**What is your organization's primary Customer Success model?**



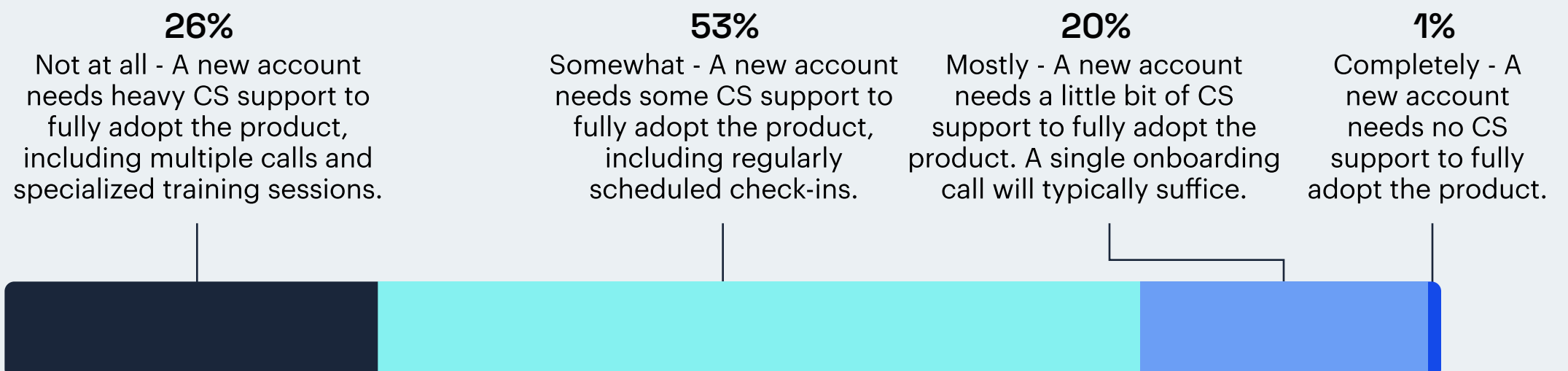
## The majority of the customer lifecycle is only somewhat automated

Worryingly, 28% of leaders reported their CS and Support teams are spending more than 10 hours on an account per month.



More than half (53%) of leaders feel their CS interactions are somewhat automated during the onboarding stage of the customer lifecycle and the accounts need regularly scheduled check-ins. Meanwhile, only 1% reported that CS support is unnecessary for a new account to fully adopt the product.

### How automated are Customer Success (CS) interactions during the ONBOARDING or equivalent stage of the customer lifecycle?

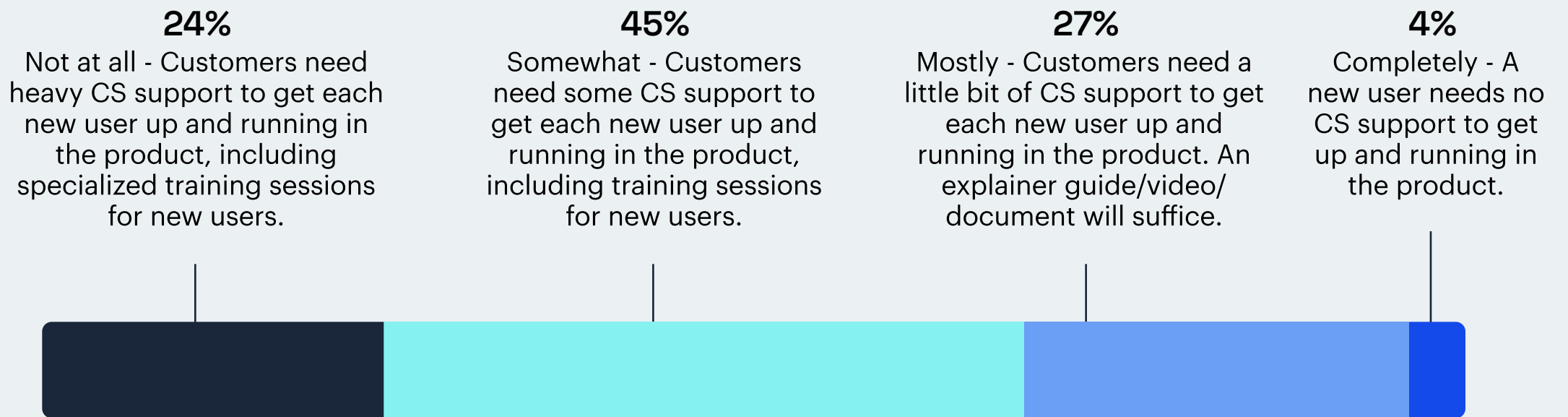


45% of respondents reported that their customers need some CS support and training sessions to get each new user up and running in their product.

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**How automated are Customer Success (CS) interactions during the ADOPTION or equivalent stage of the customer lifecycle?**

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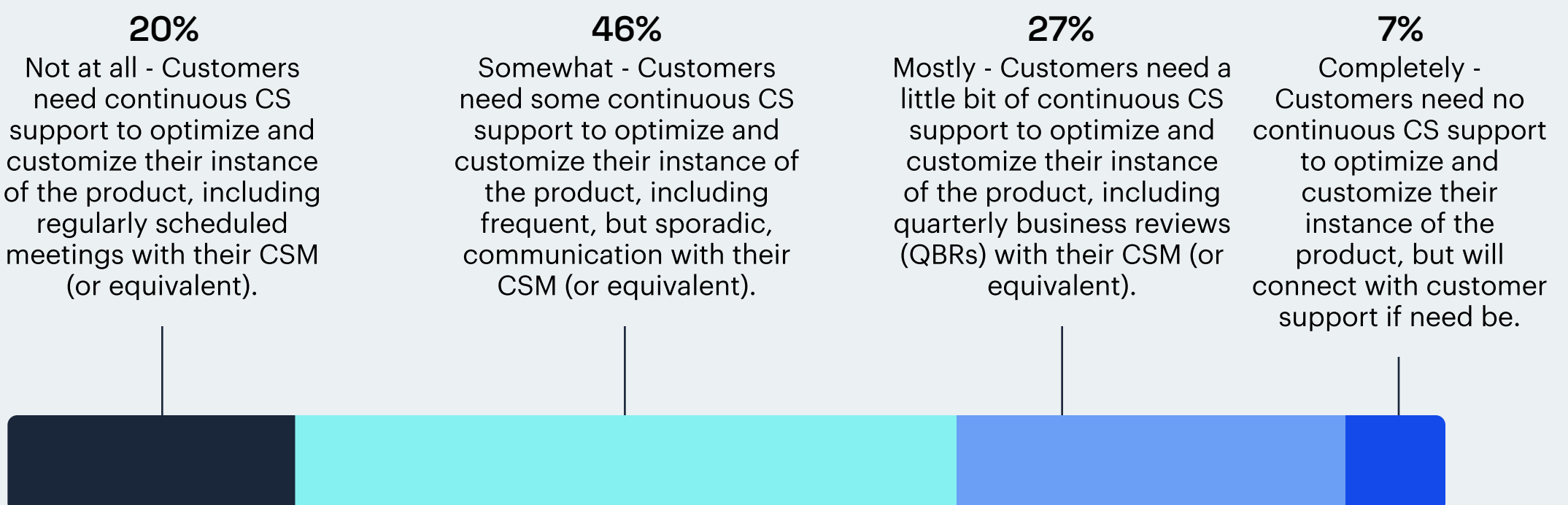
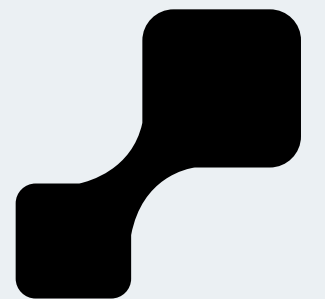


Similarly, 46% are somewhat automated in the maturity stage of the customer lifecycle; Customers need continuous CS support, including frequent communication with their CSM. Only 7% of respondents say their customers are fully autonomous while optimizing and customizing their instance of the product.

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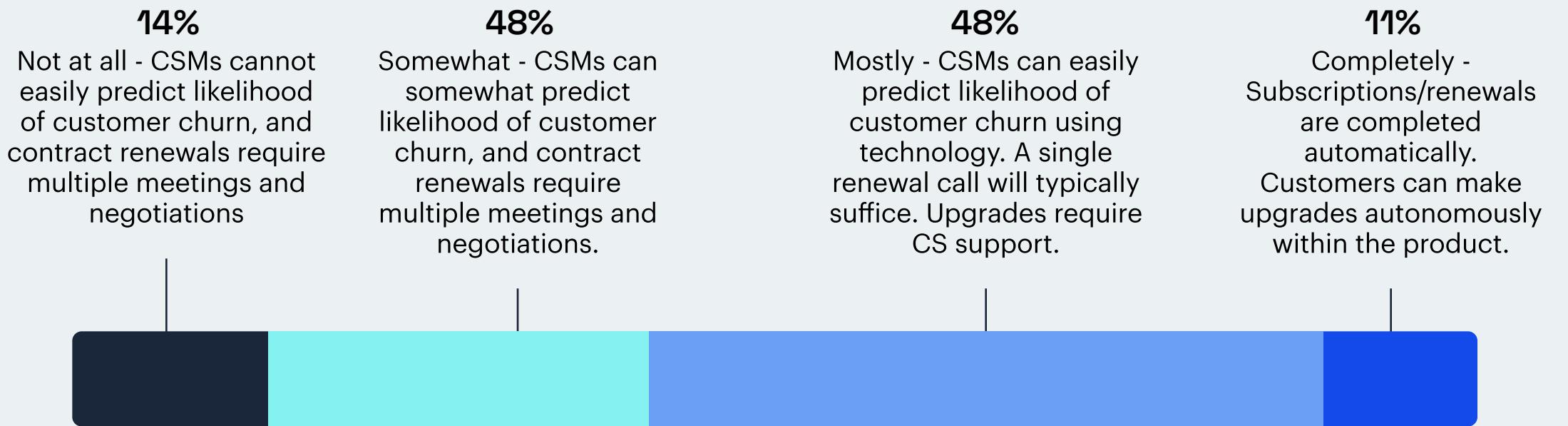
**How automated are Customer Success (CS) interactions during the MATURITY or equivalent stage of the customer lifecycle?**

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As for the renewal stage of the customer lifecycle, almost half (48%) say their CSMs can easily predict the likelihood of customer churn and only need one renewal call.

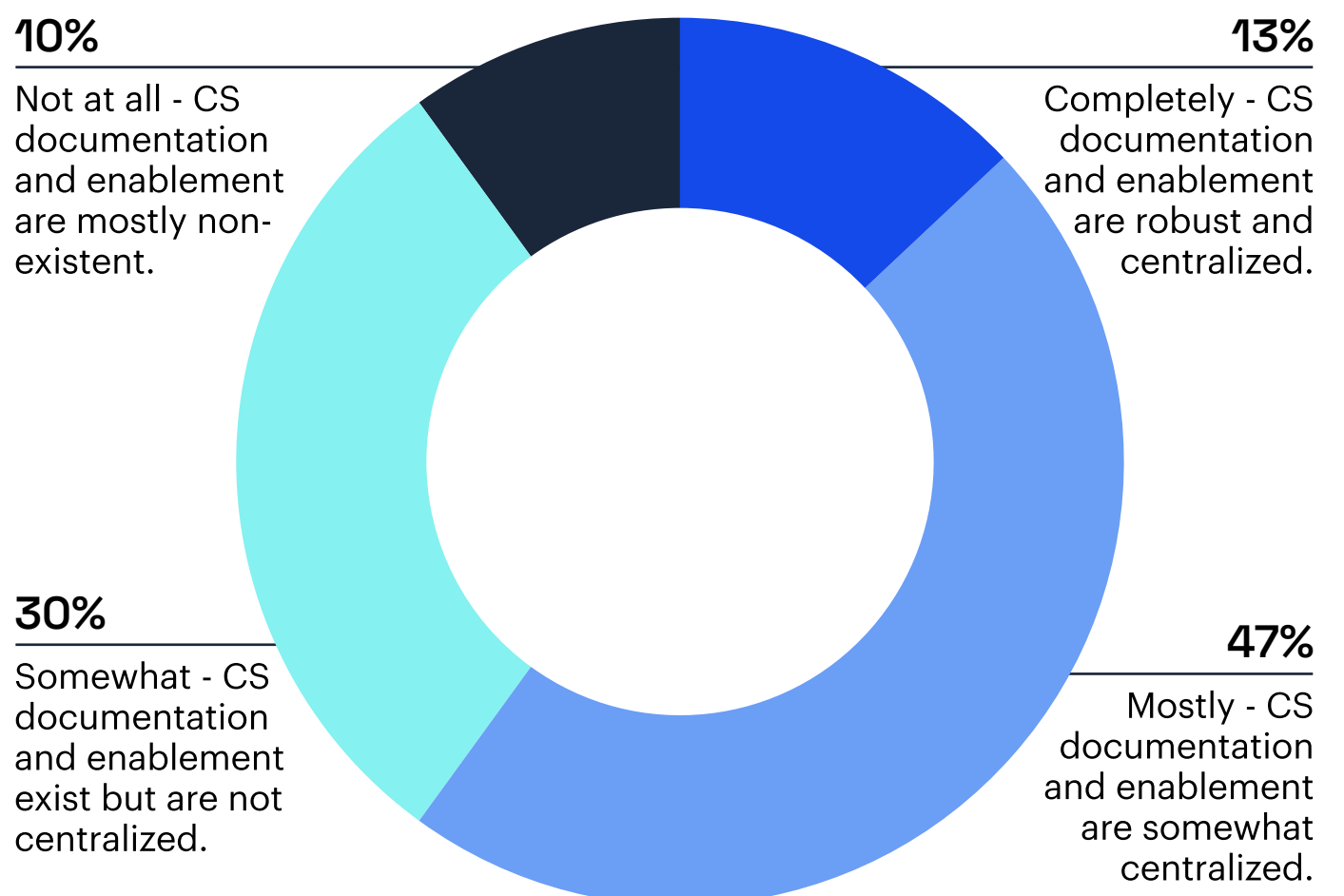
**How automated are Customer Success (CS) interactions during the RENEWAL or equivalent stage of the customer lifecycle?**



**A lack of institutional knowledge: CS processes and documentation are not centralized or uniform**

Most organizations (87%) do not have completely robust and centralized CS documentation and enablement for CS team training and education.

**How standardized is Customer Success (CS) Team Training and Education?**



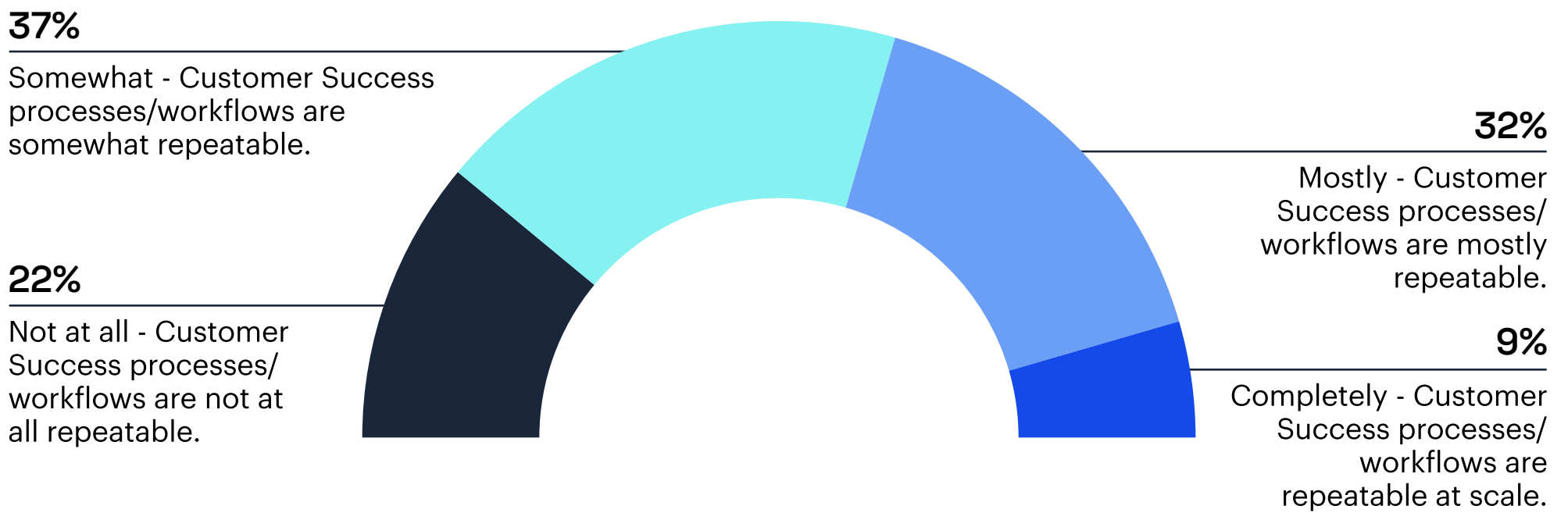


Likewise, only 9% of leaders reported that their CS processes/workflows are repeatable at scale.

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**To what degree do Customer Success team members leverage standardized processes and workflows in their day-to-day operations?**

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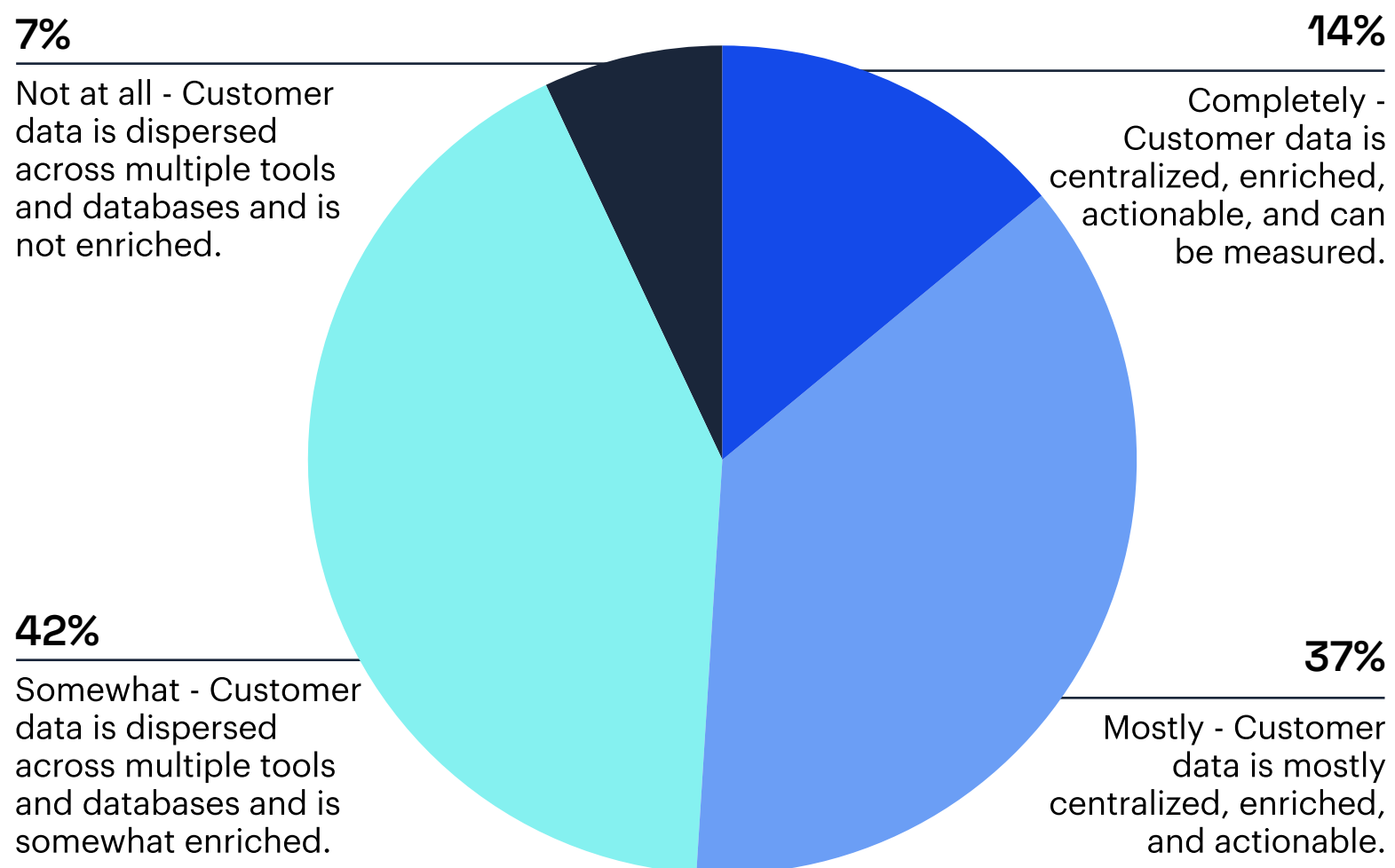


14% of respondents say their customer data is centralized, enriched, actionable, and measurable, whereas 79% say their customer data is somewhat or mostly enriched and centralized.

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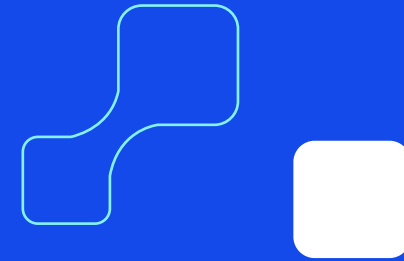
**How unified is your Customer data?**

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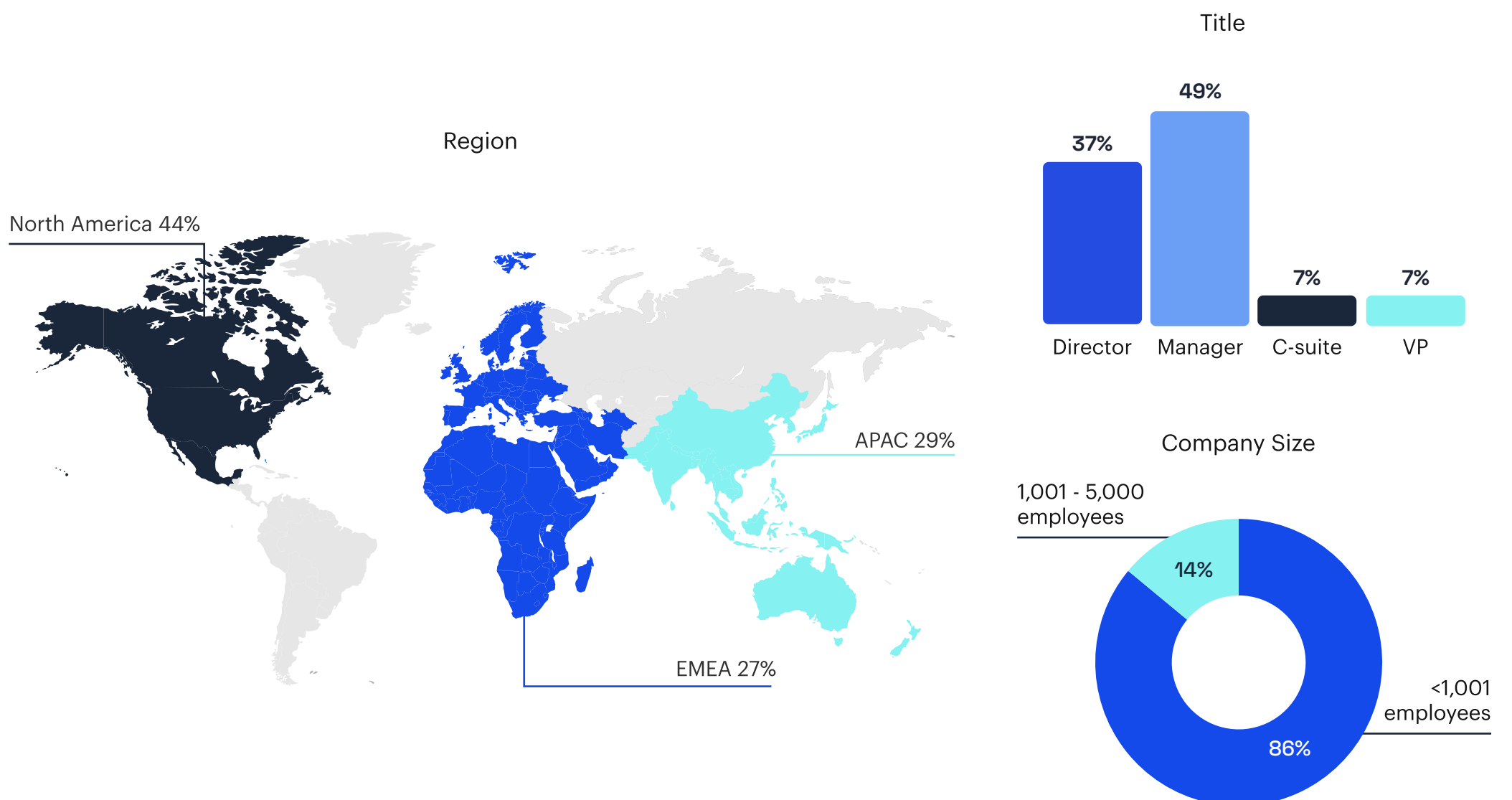


Now that you know where your organization falls when it comes to Customer Success maturity, learn how leading Customer Success teams at Productboard, Customer.io, Segment, Zapier, and more, leveled-up their CS automation, project management, reporting, and health scores with Vitally.

Request a Demo today.



## Respondent Breakdown



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Source: Gartner Peer Insights, How prepared is your Customer Success team to scale? survey

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