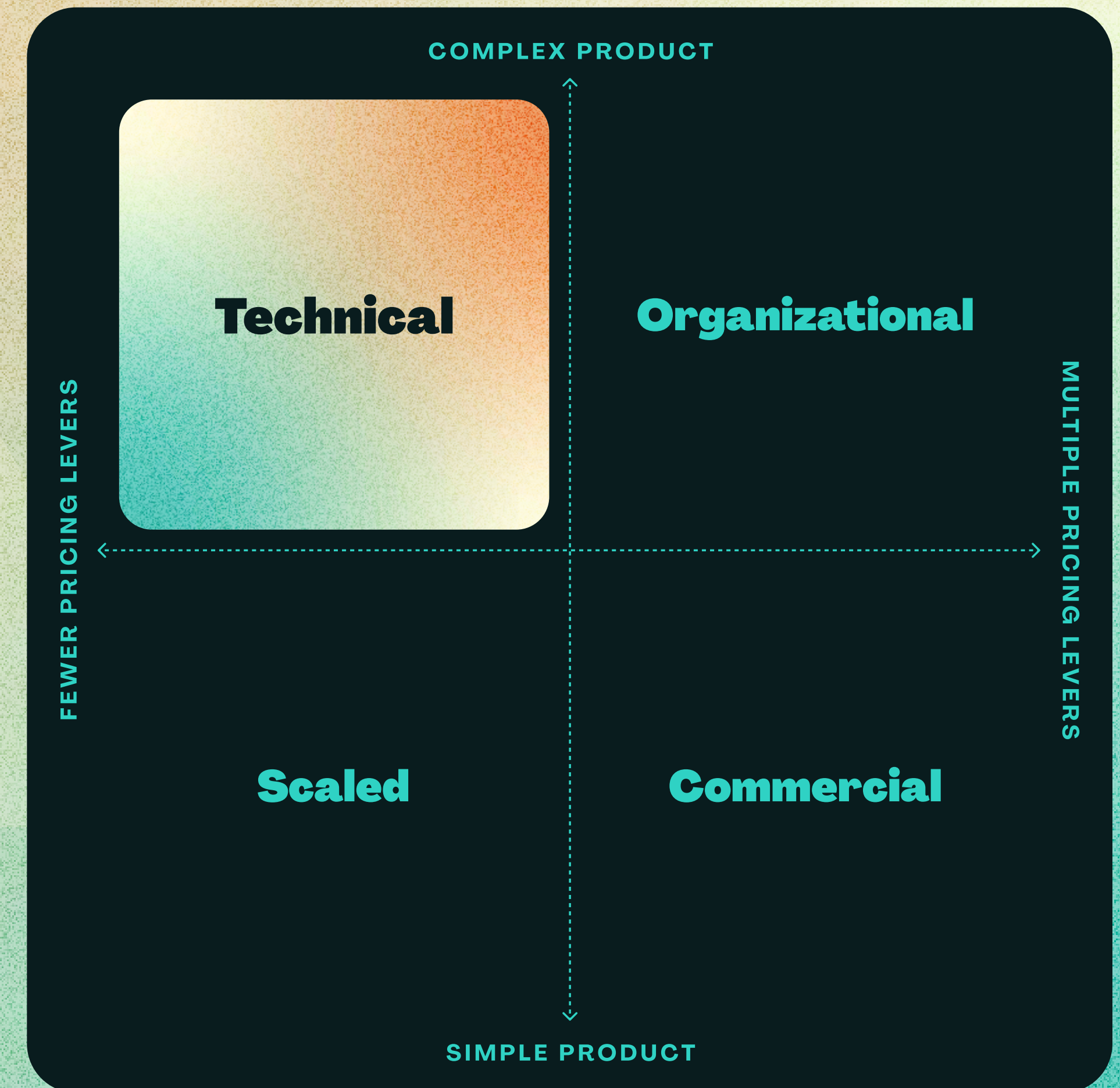


Your Ideal CS Team Structure: **TECHNICAL**

A complex product offering with a streamlined pricing model means that unlocking positive customer outcomes and business value will depend on driving product implementation, adoption, and management across your organization.

What You'll Need:

- Technical product experts
- Skilled educators
- Capable project and change managers



Areas of Specialization

The skill-sets required here are more technical, given your product's complexity. A lower rep-to-account ratio is likely needed to drive successful implementation and adoption while the transactional aspects of CS can be scaled.

Goals & Metrics

NRR and TTV are consistent goals for any CS organization regardless of structure, but tracking a layer beneath that will also be important.

For example:

- Number of technical touchpoints required for setup
- Team-wide use case adoption metrics
- Persona-based championing (as measured by % of accounts that have a key persona target and champion) to ensure that stakeholders are accurately targeted, consistently engaged, and successfully turned into champions

Ready to Launch Your New CS Process?

Schedule a personalized demo of Vitality today to see how our all-in-one Customer Success Platform can make your new CS process a reality.

[Request a Demo](#)

How CSMs Should Relate to Customers

Required Operating Rhythm

Your operating rhythm defines how, when, and why your CS team engages with customers. It can include everything from the specific roles of team members, how responsibilities are distributed, which activities the team needs to execute, and how goals are measured. For Technical CS, we recommend:

- **Onboarding:** Employ hands-on, technical onboarding that ensures admins and operational owners have properly integrated and configured the platform. Allow your onboarding team and technical product experts to take center stage.
- **Adoption:** Broaden the scope to end-user education and activation through use-case enablement. Your change managers should seek to get the entire intended audience capable and efficient in the tool, focusing on quality-of-life improvements. Consider operational syncs and power-user shadow sessions.
- **Growth:** Narrow the focus again and zero in on the buying team's decision-makers to ensure they have a detailed understanding of value, outcomes, and ROI received from the tool and a high-level understanding of the next level of success with the rich feature set they already have access to.

Required Programming to Support Customers

Reps should primarily drive product education, use cases, and thought leadership, but the messaging should be consistent across reps and supplemented with content throughout each stage.

Typical Persona Hurdles to Be Aware Of:

- Technical personas that will challenge a team's technical chops.
- Large end-user teams that don't have the same vested interest in the success of the product as the vendor or the buying committee.
- Executives that will meticulously analyze ROI and seek to lower the overall price at renewal; this can be difficult with limited pricing levers.

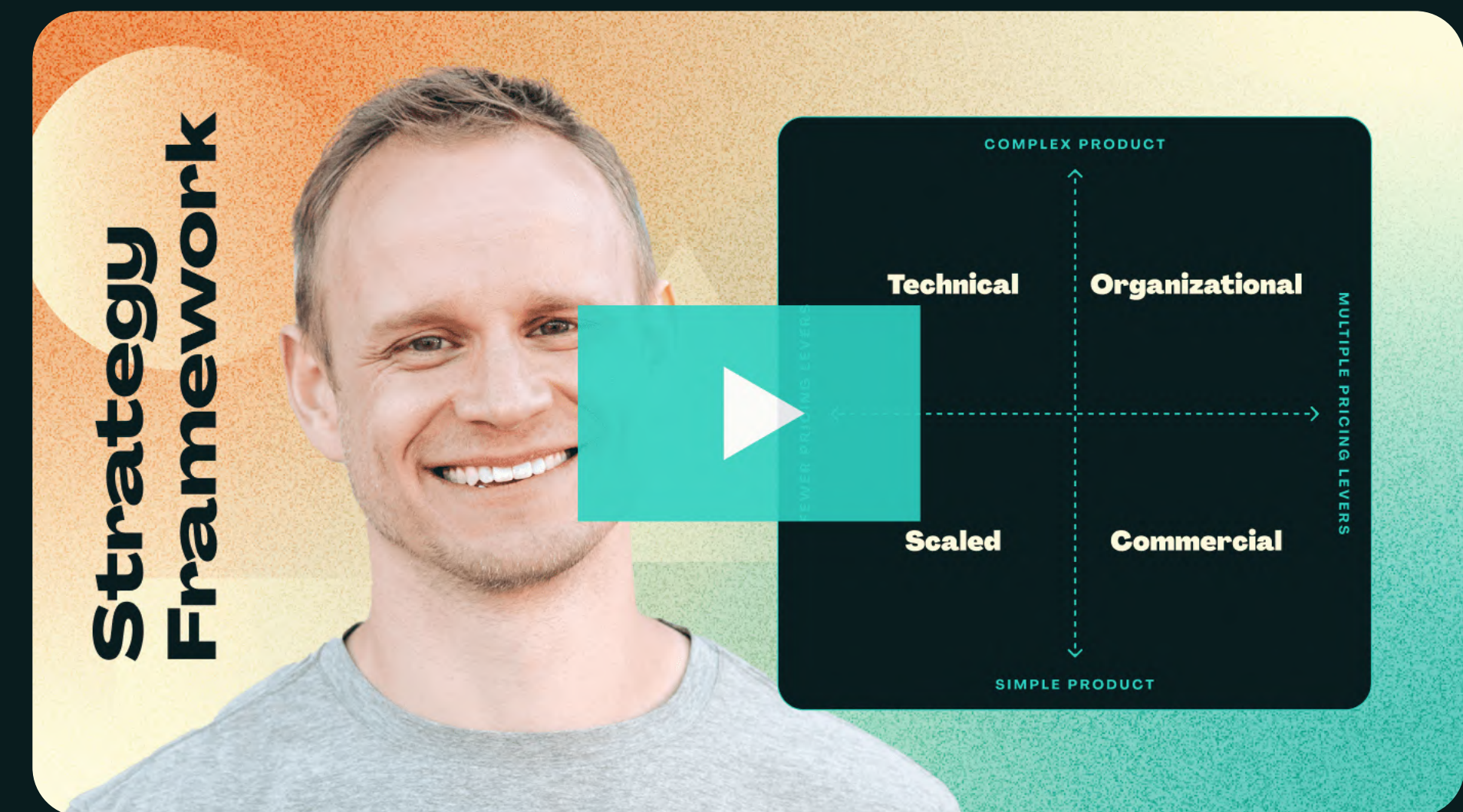
Guidance & Action Items

Technical CS Summary

- **Team Makeup:** Technical expertise, project management, and change management principles will be the primary skill sets of the team.
- **Customer Profile:** Multiple personas (some technical) to demonstrate and prove value to.
- **Engagement & Process:** High usage of human resources throughout implementation and adoption that can be scaled with content as the customer matures.

Next Steps

Based on the findings, we recommend conducting a resource audit to account for what skill sets you have on the team, where any gaps are, how time is being allocated, and how much bandwidth is available.



Once you have completed that, you can put pen to paper to begin fleshing out your CS process. To aid in this, please watch our [“CS Strategy Framework” video](#), which takes the core pillars of a sound CS process and guides you through documenting what your company’s strategy should look like.