A VITALLY RESEARCH REPORT / SUMMER 2023

Vitally

THE STATE OF KNOWLEDGE SHARING

IN CUSTOMER SUCCESS ORGANIZATIONS

CONTENTS

Introduction 03

KEY FINDING 01 Project Management Tools vs. CSP Software 04

KEY FINDING 02 How Customers Communicate With CS Teams 06

KEY FINDING 03 Chat Workspaces Rule Internal Conversations 07

KEY FINDING 04 Is Context Being Lost in CS/Support Chats? 09

KEY FINDING 05 Knowledge Sharing With Marketing and Sales 10

KEY FINDING 06 CS and Product Are Closer at Bigger Companies 12

KEY FINDING 07 CRMs Still a Top Choice for Customer Data Surfacing 14

Additional Learnings / Summary / About the Participants 15

INTRODUCTION

In today's competitive B2B landscape, customer experience is a powerful differentiator — which makes your Customer Success department absolutely critical to the growth of your business.

Since Customer Success teams are on the frontlines of customer interactions, they need to be masters of communication. But it's not just about having the latest tech. Effective knowledge-sharing processes are equally essential. After all, great customer experiences don't happen in a vacuum.

In March 2023, Vitally surveyed 157 Customer Success professionals, executives, sales reps, and support specialists about their use of business communication tools, Customer Success Platforms (CSPs), and project management software. The results highlight the importance of knowledge-sharing practices and processes in B2B organizations. (**Skip to the end of this report** to learn more about our survey respondents.)

The main takeaway from our research? To provide outstanding customer experiences, B2B businesses have to be very proactive when it comes to internal knowledge-sharing. This creates a culture of collaboration and alignment towards shared goals, which helps drive meaningful results.

Here are seven things our data told us.

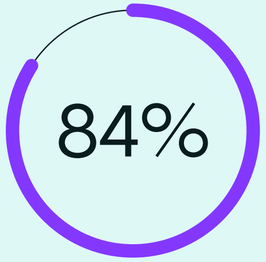
THE BOTTOM LINE...

To provide outstanding customer experiences, B2B businesses have to be very proactive when it comes to internal knowledge-sharing.

KEY FINDING 01

Project Management Tools Are the Norm, and CS Platforms Are Catching Up

Project Management software tools such as Asana, Jira, Notion, and Trello have grown incredibly popular among B2B organizations. **84% of respondents reported that their Customer Success organization uses a Project Management tool**, including a full 100% at companies with under 25 employees and over 500 employees.

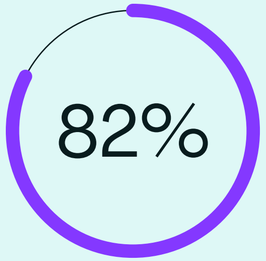


of respondents use a Project Management tool in their CS organization

Percent of respondents using a Project Management tool

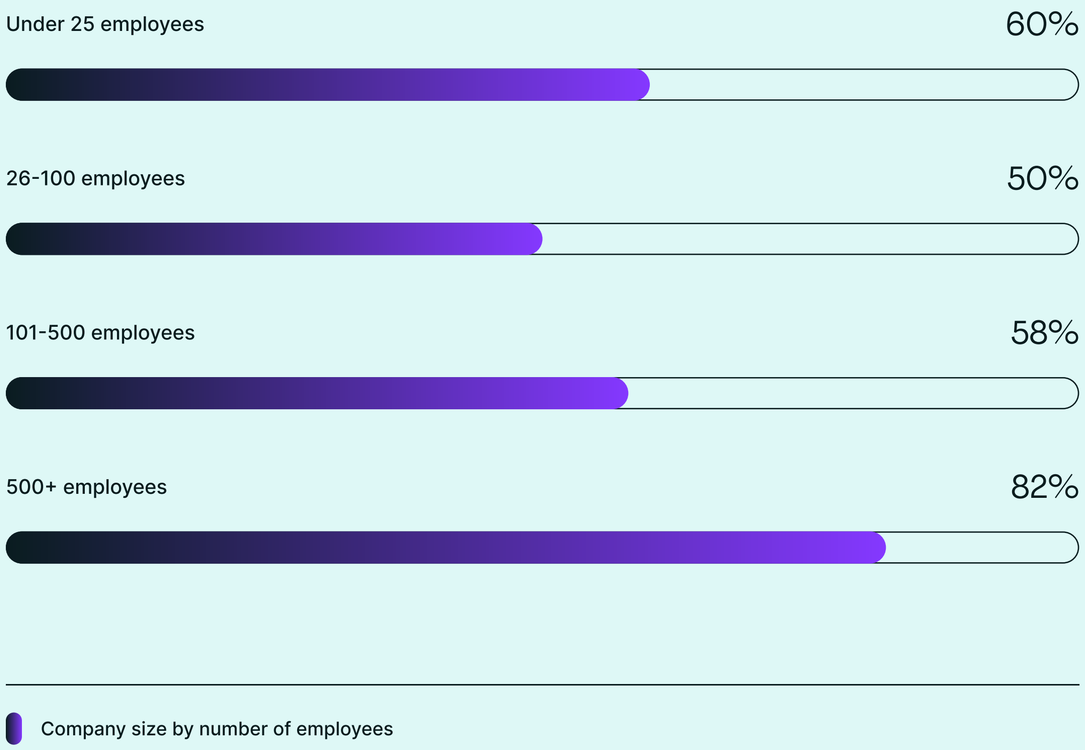
KEY FINDING 01

While Customer Success Platforms (CSPs) aren't quite as widespread in B2B tech stacks, **CSPs are used by a full 82% of companies with over 500 employees**. 50-60% of companies in smaller segments reported using CSPs.



of companies with over 500 employees use CSPs

Percent of respondents using a Customer Success Platform (CSP)



KEY FINDING 02

Customers Rely on Traditional Methods to Transfer Information to the CS Team

When customers transfer knowledge to the CS team, emails and meetings are the most common methods of communication, regardless of company size.

Across market tiers, customers rarely use project management software to communicate and collaborate with CS teams.

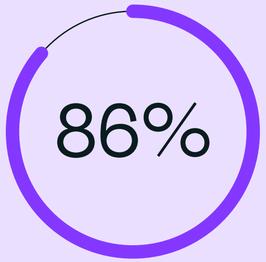
NOTE /
The ability for customers and CS teams to quickly collaborate is one of the inherent advantages of using Vitally Docs.

How often are the following resources or tools used when transferring knowledge to the Customer team?

KEY FINDING 03

Chat Workspaces Are the Dominant Force in Internal CS Communication

While email appears to be the dominant mode of communication from customer to the company, chat workspaces like Slack and Microsoft Teams are most preferred for internal communication. **86% of respondents said they use these tools "very frequently,"** edging out meetings (68%) and emails (52%).



of respondents use chat workspaces "very frequently"

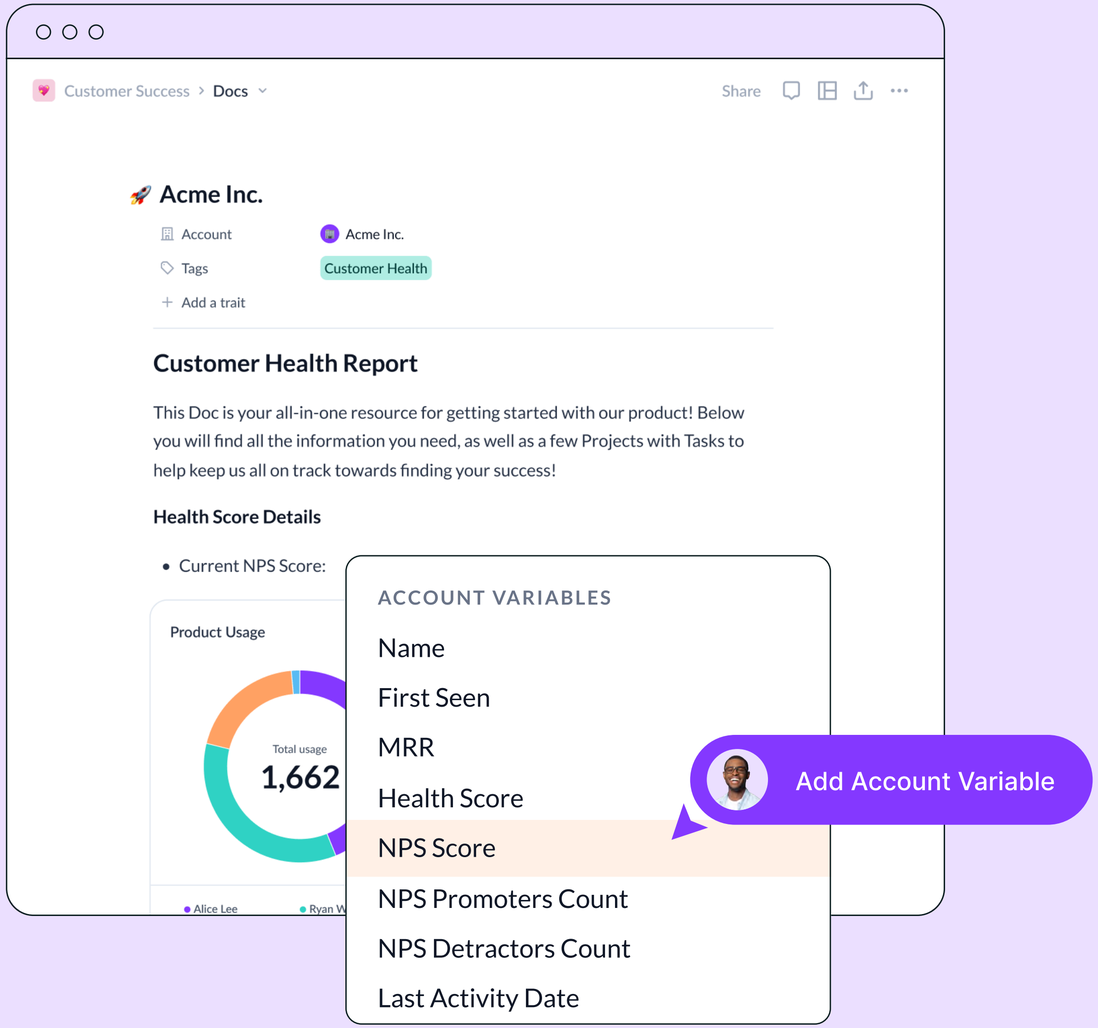
How often are the following used when transferring knowledge within your Customer Success organization?

KEY FINDING 03

For all intents and purposes, chat workspace tools have replaced email as the dominant mode of internal communication for many companies. These tools are more immediate, easier for conversation-threading, and offer more integrations and productivity features. However, chat workspaces also create new blind spots for companies, as they're less templatizeable, harder to search, and contain more noise.

The least common methods of internal CS communication are forms and surveys (frequently used by only 5% of our respondents) and knowledge base tools. Since larger companies are more likely to have both of these items in their communication stack, a CSP that includes these features might be appealing to enterprise businesses that are currently juggling too many software tools.

NOTE /
Vitally Team Docs allow documentation and customer data to live in the same workspace.



KEY FINDING 04

CS and Support Conversations Are Happening in Places Where Context Gets Lost

Overall, CS teams and Support teams communicate in fewer channels, preferring to share knowledge in chat workspace conversations (the most frequent communication channel) and email. Even traditional methods of business communication like CRM platforms and spreadsheets fall into “rarely” territory for CS/Support conversations.

The problem is that so much context and history can be lost with chat workspace and email conversations. Without these interactions logged in a central “source of truth” like CSP, CRM, or project management tools, it becomes very difficult to find important conversations and files, or where certain projects stand.

How often are the following used when Customer Success teams transfer knowledge the Support team?

KEY FINDING 05

...And the Same Is True for Knowledge Sharing Between CS and Marketing/Sales

Over **90% of Customer Success teams rely on chat workspaces and email** to share information with Marketing teams.

Although Marketing teams tend to live inside Word/Google Docs for planning and content creation, these tools are used only moderately for collaboration with Customer Success teams. Knowledge-sharing between Marketing and CS occurs even less frequently within project management software.

of CS teams rely on chat workspaces and email to share information with Marketing teams.

How often are the following used when Customer Success teams transfer knowledge the Marketing team?

KEY FINDING 05

Customer Success and Sales teams also do most of their communication in tools where it's hard to quickly locate important conversations and files. Across all company sizes, chat workspaces reign supreme when it comes to transferring knowledge between these two teams, with email and meetings close behind.

Survey results show a correlation between the size of the company and how frequently the CS and Sales teams use shared documents to exchange knowledge, with larger companies relying on this method the most frequently.

Across all company sizes, Customer Success and Sales teams tend to avoid asynchronous videos and knowledge bases for info sharing.

How often are the following used when the Sales team transfers knowledge the Customer Success team?

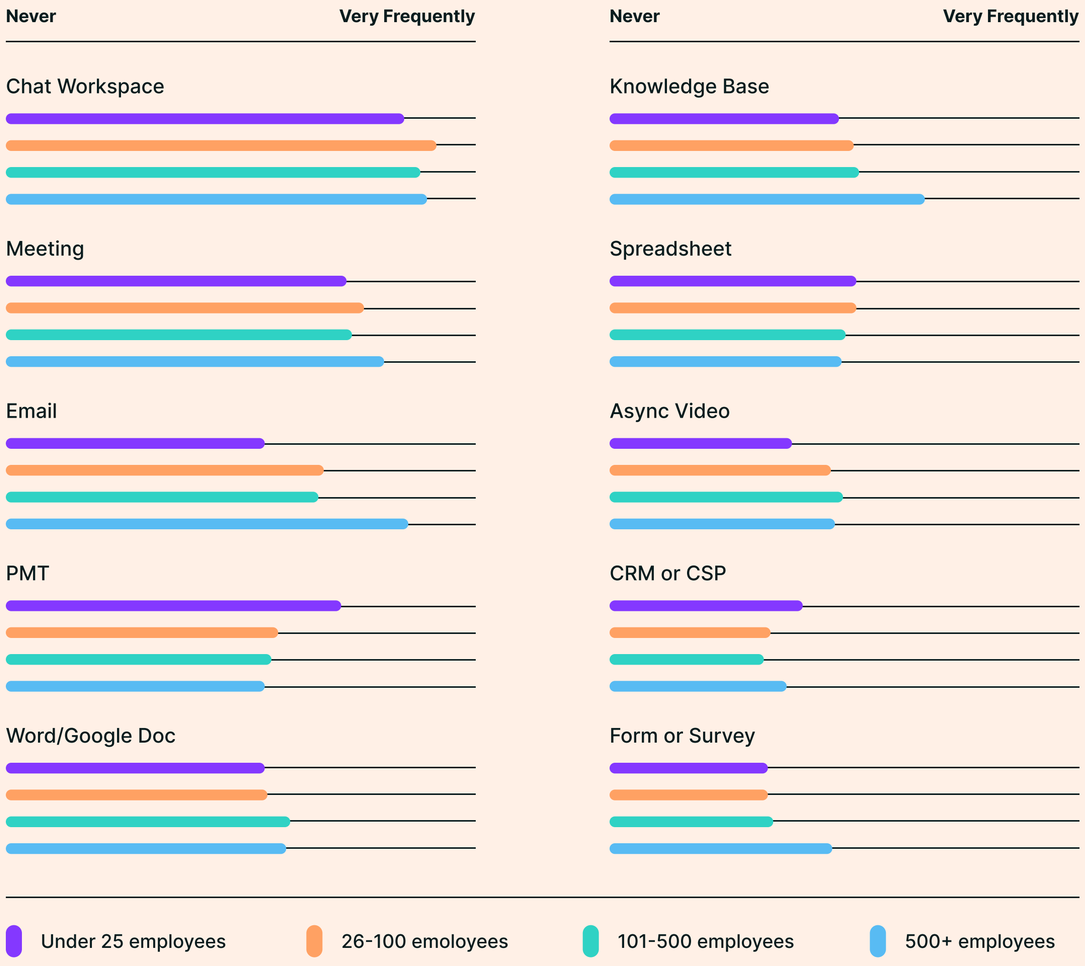
KEY FINDING 06

Communication Between CS and Product Teams Is More Consistent at Larger Companies

While a lot of these trends are similar for knowledge-sharing between Customer Success and Product teams, one thing jumps out: The relatively high usage of various communication tools among enterprise companies.

Respondents from companies with over 500 employees used email, forms and surveys, and knowledge base tools far more than their smaller-company counterparts. For example, **44% of enterprise companies frequently use email to transfer knowledge between CS and Product**, while only **16% of companies with fewer than 25 employees** do the same.

How often are the following used when the Product team transfers knowledge the Customer Success team?



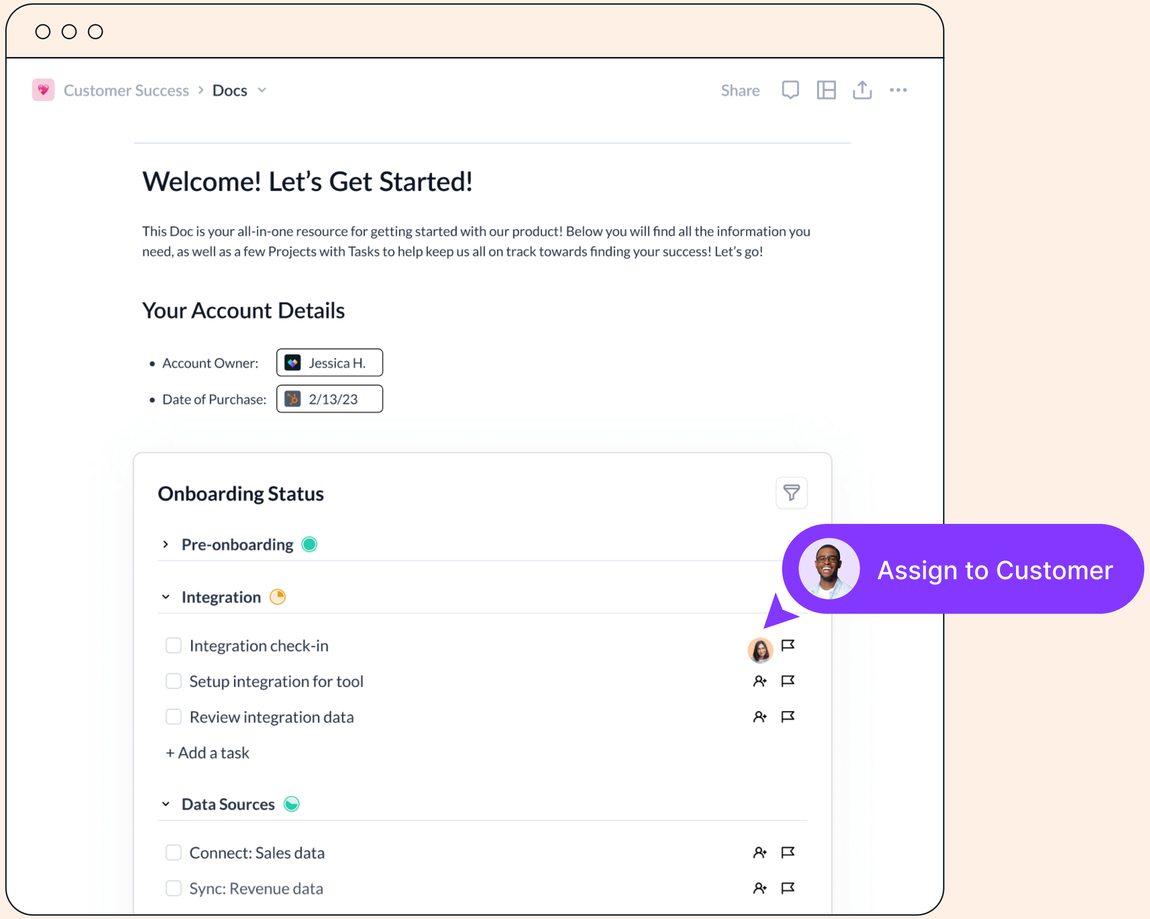
KEY FINDING 06

Enterprise companies sometimes get criticized for being behind the times with technology adoption, but the fact that they are more consistent with knowledge base and form tools bodes well for their CS efforts.

Enterprise companies understand that retention and expansion is key to growth. These companies might be slow-moving at times, but they got to where they are by doing some things right, and other market segments might benefit from taking a page out of their book.

OUR TAKE /

If you can combine the documentation and communication rigor of enterprises with the agility of smaller companies, that's a recipe for success. Vitally Docs let you do that.



KEY FINDING 07

CRMs Are Just Behind Chat Workspaces When It Comes to Surfacing Customer Data

When asked about the methods their companies use to make customer data accessible to relevant teams, chat workspaces once again led the pack with **67% of respondents relying on them frequently**, but were closely followed by CRMs, **which are used frequently by 57% of respondents**. This makes sense, as CRMs have been the traditional method for centralizing customer data and making it accessible throughout an organization.

CSP tools appeared lower on this list, with **just 26% of respondents** regularly using them to make customer data available to relevant teams. From our own experience, CS tools are more likely to be used within specific customer-facing departments than throughout an entire organization.

What method of knowledge sharing does your organization use to make customer data accessible to relevant teams?

ADDITIONAL LEARNINGS

How the CS Team Transfers Knowledge to the Implementation Team

60%

of startups very frequently use a chat workspace for knowledge-sharing between CS and Implementation teams

Meetings and emails were the runners-up here, with larger companies using these methods more frequently than their small counterparts.

How Customers Transfer Knowledge to the Sales Team

36%

of startups very frequently use a chat workspace for customer to communicate with Sales

14%

of mid-market companies never use a shared document to transfer knowledge from the customer to Sales.

How Customers Transfer Knowledge to the Support Team

79%

of companies use ticketing systems very frequently for CS/Support communication

59%

of companies use email frequently for CS/Support communication

3%

of companies use project management software for CS/Support communication

SUMMARY

The results of our report suggest widespread usage of tools like chat workspaces, emails, and live meetings, but reveal opportunities for companies to consolidate and share information more transparently.

On average, knowledge-sharing processes still tend to live within too — chat workspaces and email — where customer data and information is disconnected, easily lost, and not easily searchable.

There are missed growth opportunities by not using a Customer Success Platform (CSP) as the primary tool for collaboration and knowledge transfer.

Implementing a CSP establishes a single source of truth that is easily accessible throughout an organization. This leads to enhanced knowledge transfer and collaboration, as team members can work together in real-time and make informed decisions based on accurate and up-to-date information.

IIn most cases, we found no statistical significance between company sizes in terms of how knowledge was shared between departments. More research needs to be done in this area before we can draw any hard conclusions.

Without a CSP, there's no centralized location for customer data and processes, which can lead to a lack of cohesion and efficiency within the team.

ABOUT THE PARTICIPANTS

For more information on this report, contact: **hello@vitally.io**

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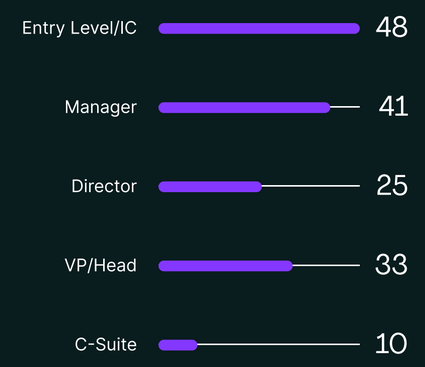
Survey Respondents

20

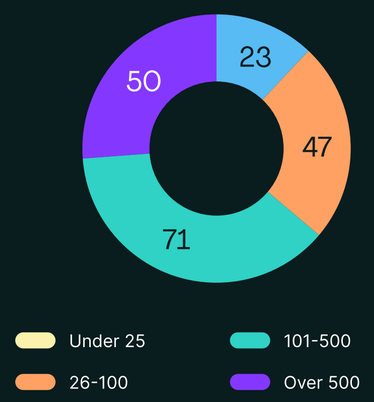
Questions

Seniority Level of Participants



Participant Distribution by Job Function

Number of Employees at Participant Companies



LARGEST SEGMENT

45.2%

of respondents work at companies with 101-500 employees

2ND LARGEST SEGMENT

31.8%

of respondents work at companies with 501+ employees

30.6%

of respondents entry-level or IC roles

43.3%

of respondents Director title and above

58.6%

of respondents report a role on a CS Team

Vitally

Now that we've explored the state of knowledge-sharing in the Customer Success industry, you might be interested in improving your own organization's practices. If so, Vitally can help, providing seamless communication and collaboration within your Customer Success organization and beyond. Our all-in-one platform serves as the single source of truth for both Customer Success teams and their customers.

Vitally is on a mission to help B2B companies foster productivity, visibility, and collaboration across teams and with customers.

Schedule a demo to learn how Vitally can increase knowledge sharing across your team and customers.

VITALLY.IO/DEMO-REQUEST