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Customer Success

Account Development

Summary

Software and technology companies continue to grow at a fast pace! To enable the growth the CS organisations needs to enhance it's approach to build on its excellent product knowledge and ensure it has a more commercial focus when driving areas such as:

- Contract Renewals (negotiation)
- Customer Retention
- Expanding the solution, across the organisation.

These changes will require the CS team to enhance their capability, skills and behaviour to ensure that they can maximise their client engagement, influence customers throughout conversations and identify new upsell opportunities (increase spend) and cross sell opportunities - expanding into other areas of the wider organisation.

This programme is designed to provide structure and rapid development of the CS team. It provides a fast track to embed commercial skills and behaviours into the team and ramp up client engagement, focused on better renewal conversations, increased upsell and cross sell focused on driving MRR, ARR and lifetime value.

It creates 'The Way of Customer Success', and provides a Strategy, Blueprint and Playbook to proactively develop accounts and build sustainable growth within CS.

It provides the company a shorter time to new hire effectiveness, improved conversion rate, increased revenues and enables the company to continue to scale up.

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What is the programme?

Customer Success has many roles to play including implementation, driving user adoption and then negotiating contract renewals. This programme is designed to support the customer success team in building skills and behaviours to engage customers in a more influential way that will enable them to explore upsell and cross sell opportunities.

They will learn when to have more focused quarterly business reviews with clients and how to trigger conversations that uncover unmet needs. They will learn how to explore potential solutions, either within the existing product mix (making the product more sticky) or by enhancing the solution with other products and/or services.

Building "The Way of CS" is broken down into several key phases to ensure we can build new starters rapidly and develop our existing team to deliver an excellent customer experience and cross sell our services. The key development steps are as follows

- **Customer Success Journey, Sales Process and Methodology**
- **Knowledge, Skills and Behaviours**
- **Training and Development Rollout (DEVELOP)**
- **Embedding Behaviours**
- **Review and Evaluation**

As part of the training, empirical research and behavioural science and psychology is used to reinforce the learning points and provide insight in to what separates great CS people from the average performer. They will learn real applicable skills and behaviours that they can apply instantly to engage the customer and drive conversion.

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CS Team
Development
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Customer Journey & Experience

The first part of building an effective CS Way is to review the customer journey and understand what the customer is thinking, feeling and doing throughout the contract lifecycle. We can then ensure that at each touchpoint they have a great experience and drives an emotional connection with you and the solutions.

Mapping the Customer Success Journey

This may have already been completed but it is worth revisiting the customer success journey and map out the various stages of the journey and what part of the contract cycle each aspect takes place. Having done this we can then define both CS and customer objectives at each stage.

- Handover from Sales
- Implementation of products and services
- Gathering success and ROI metrics
- QBR & Driving User Adoption
- New business conversations
- Renewal conversations

Mapping Knowledge, Skills and Behaviours

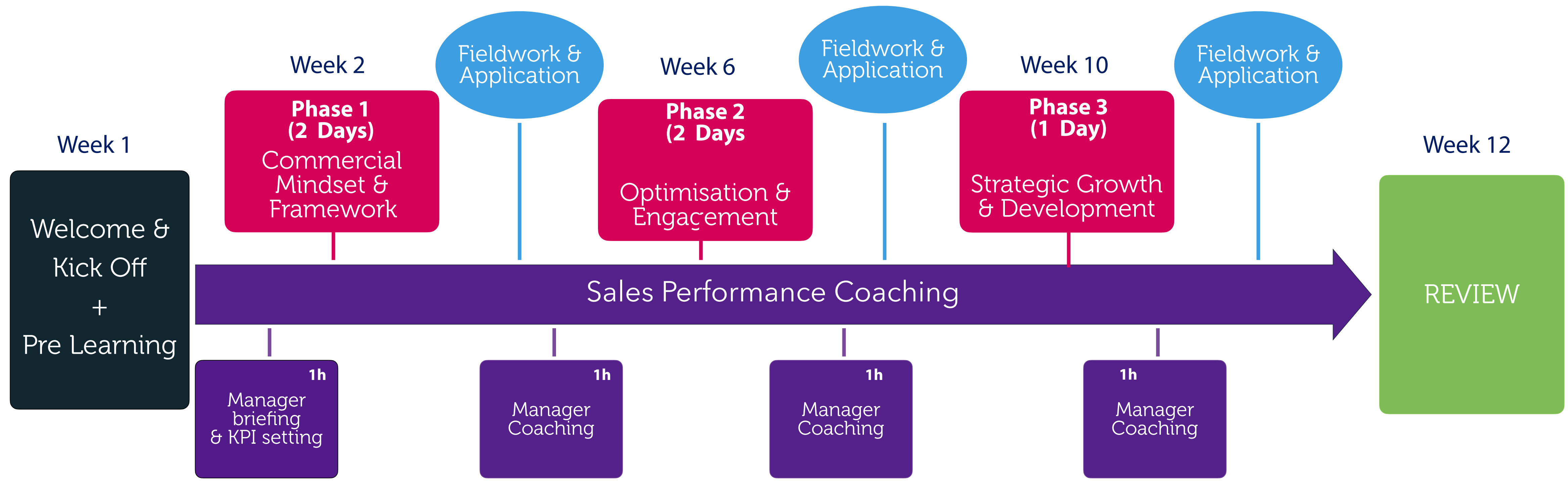
Having defined the customer steps we will align the knowledge skill and behaviour the CS person requires at each step to support and influence the customer.

We will align:

- Our Objective at each stage
- Knowledge Required
- Skills and Behaviours
- Tools we have (collateral)
- Points of differentiation

This is crucial if we are to help the CS team understand how to manage the interaction at the different stages of their journey, the emotions associated with each, how how to influence the customer in the right way. We will also build assessment tools to observe CS team behaviour and effectiveness.

Learner Journey - 12 Week programme example



The learner journey ensures that each delegate not only learn the skills and methodologies for each part of the process, but more importantly **they are successfully applied** in their role.

Workshops
Each workshop session is highly interactive and focused on bringing the content to life through discussion, RealPlay, and utilising the delegates experiences and scenarios. Each workshop is circa 2 days to maximise the learning time and reducing downtime. Depending on availability we can also split the programme to be delivered both Face to Face and / or virtual classroom and split across 1/2 days to save Global team members having to travel.

Fieldwork and Application
Each workshop is spread across each month to allow time for the delegates to take their new found skills and behaviours and practice them in their calls. Each week an email will be send to the team with video, reading and refreshers on some of the tools and techniques taught, with reminders and actions to practice during the week.

Manager Coaching and Support
As with all behavioural programmes the success is linked to the effectiveness of Managers embracing the new behaviours and reinforcing them with the team. With that in mind we will deliver Manager coaching around the behaviours to build the skills within the team alongside the rollout of the programme.

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Account DEVELOPment within Customer Success

The Salecology DEVELOP process will be utilised in the programme. It is designed to guide and shape your understanding of the account and move from Reactive to Proactive account development.

Deliver, Evaluate & Value Creation

The first priority of CS is delivering on the promises made during the sale. This includes implementation, training and rollout, and then consistently driving user adoption. Quarterly Business Reviews are designed to take a read on customer happiness, sharing issues, challenges, successes and also provides an ideal time to build internal metrics, demonstrating the impact of the solution.

Elevate, Leverage and Opportunity Spotting

Moving from Account Management into Account Development, CS needs to analyse their accounts to identify potential areas for growth. Then they need to elevate higher and wider across the business and leverage their contacts to gain introductions to other parts of the business. This will not only generate further opportunities but also aid in becoming more intwined in the organisation.

Protect

All of the above forms part of the protect, but this part of the process looks at at risk accounts, contact renewals and maintaining margin and lifetime value.

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D

Deliver

Have we delivered on the solution? This covers all aspects of implementation, training and driving user adoption. Have we dealt with any customer issues, complaints and so on.

E

Evaluate

How is the customer feeling about the solution? We need to take a temperature check of the customer during our Quarterly Business Reviews and understand if they are truly happy with the product and services, and if they are likely to stay or churn.

V

Value

What is the customers perceived value of our solution? This part looks at how to help clients build internal metrics and quantify the return on investment (tangible and less tangible) to be able to demonstrate the value of the solution.

EL

Elevate & Leverage

Who do we need to get access to? How do we gain access to get back in touch with influencers and senior decision makers. How do we get higher and wider across the organisation?

O

Opportunities

What opportunities can be spotted across the account to expand the products and services? What are the compelling propositions that could be offered and how to open the conversations to qualify the opportunity.

P

Protection

What activities are we doing to protect the existing revenue from competitive threats? How are we getting further embedded into the organisation to influence renewals and future buying cycles.

Commercial Mindset and Framework

Phase one of the programme is to bring a commercial mindset to the Customer Success team and develop their sales and influencing skills and behaviours.

This module acts as the core aspects of the rest of the programme as it will link throughout the various sessions and continue to come back to style and personality. It introduces sales psychology and how to connect with people and start building relationships and leverage that relationship throughout the customer lifecycle.

Some key components of this 2 day workshop is how to engage customers into a conversation outside of the usual customer care type conversation and product focus. It teaches hold to seamlessly step into a discovery focused conversation that will uncover new and unmet needs and how to introduce new products and features, and get the customer to commit to the next steps, which could easily be gaining access higher and wider across the organisation and engaging with more senior stakeholders.

PHASE 1

Commercial world of CS

- ✓ Account Management vs Development
- ✓ Selling in a CS world
- ✓ The 3 Questions that determine success
- ✓ 4 Parts of a sales call
- ✓ Salecology Personality types
- ✓ Your Salecology personality profile
- ✓ The DEVELOP process for CS

Discovering new opportunity

- ✓ How to avoid selling at the wrong time
- ✓ How to build strong Needs
- ✓ Influencing through conversations
- ✓ Creating a burning platform for change
- ✓ Demonstrating credibility in focused questions
- ✓ Extending the Impact of the solution

Gaining Commitment

- ✓ The cause of most objections
- ✓ Pain and Gain Analysis
- ✓ Making compelling Benefit Statements
- ✓ Advancing the sale
- ✓ Gaining Commitment

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Phase 2

Engagement Strategy

- What is lifetime value
- Developing implementation plans for new accounts Setting expectations and success criteria
- Introducing QBR cycle
- QBR 1 - 4, planning for success

Building Value

- Questions that effect outcomes
- 3 Levels of Listening
- Capturing metrics and success stories
- Triangulating information
- Engaging stakeholders
- Pre-During- Post QBR engagement

Renewal and Pricing

- Evaluating impact of solutions
- Building recovery plans for at risk accounts
- Preparing for Legacy pricing conversations (You and them)
- Calibrated Questions in objection handling
- Value vs price
- Positioning price increases for a win / win
- Price increase conversations

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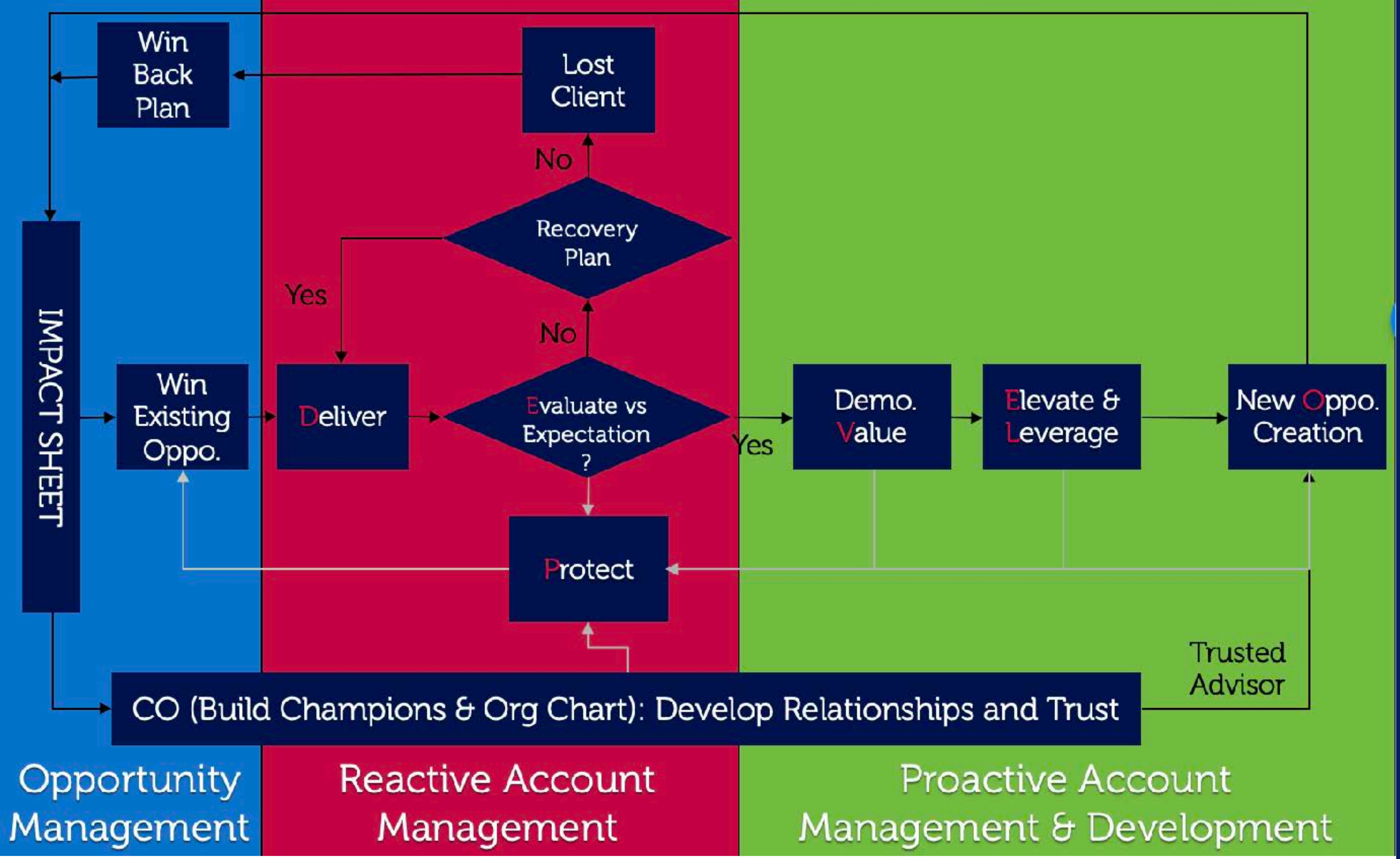
Optimisation and Engagement

This second phase of the training is designed to build structure around the contract lifecycle and build lifetime value. This includes onboarding, driving user adoption, building value and contract renewals.

This part of the programme looks at the planning and sequencing from the initial handover from sales and how to set and manage the customers expectations going forward. It introduces the Quarterly Business Review meetings, the purpose behind each, from QBR 1 - post onboarding (uncovering metrics and proving value) through to QBR 4 - renewals (with product and price uplift). It reflects on Time to Live / Time to Value / Time to Grow.

For some broth businesses this programme also teaches how to migrate customers from legacy pricing and how to maintain margin though tough pricing conversations. It also looks at account maps and planning, categorising the accounts into 4 key quadrants, identifying, those maintenance, growth and at risk accounts and building strategies for each. It demonstrates how to spot opportunities and build a game plan to develop the account.



Strategic Growth and Development

This part of the programme looks at moving from tactical conversations to a strategic partner approach, opening wider opportunities to cross sell solutions and leveraging existing networks to broaden the reach in the client organisation.

This phase takes a more holistic look at the Account Development aspects of CS and builds a strategic plan to expand the accounts whilst protecting existing revenue. It helps the team review their targeted number, identify the variables within it (cancellations, price uplift, new business) and build a commercial plan on how to achieve those numbers.

Having completed their sales plan it teaches how to spot opportunities for growth within their accounts and build a strategy on how to access key stakeholders to open those new opportunities, and combining phases 1 and 2, they will have the knowledge, skills and behaviours to do so. The final aspect of this session is to practice leveraging their network and conversations to gain access to those stakeholder, the reasons why some people don't like to make those introductions and how to get higher and wider.

Phase 3

Sales Management

- ✓ What goes into your 5 Point sales plan
- ✓ Statement of intent - goals setting
- ✓ Pipeline and gap analysis - full year plan
- ✓ Account Prioritisation
- ✓ Contact Strategy

Account Development

- ✓ Building an Account Development Plan
- ✓ Spotting white space opportunities
- ✓ Stakeholder Mapping (Authority and Influence)
- ✓ Leveraging your champion to gain introductions
- ✓ Moving up the Relationship Ladder
- ✓ Stakeholder management and accessing the Powerbase

Strategic Partner

- ✓ Moving off of product onto strategy
- ✓ Opening conversations with KDM's / C-suite
- ✓ Challenging the status quo
- ✓ Sell - To / Thru / With / Over
- ✓ Creating compelling events
- ✓ Adding strategic value
- ✓ Handing back to sales

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Training and Development

Learning - Your Way

To enable you to get the best out of the programme we provide a learner journey that ensures that you not only learn the skills and methodologies for each part of the sales process, but more importantly are successfully applied.

We feel people learn best when they are in control of their own learning, therefore we provide a combination of learning materials and modules which are made up of elements of both self-paced learning and interactive classroom based elements. That way people can plough through the material or take their time - depending on workload and available time. We provide a combination of:

- **Classroom sessions**
- **Webinars**
- **Videos**
- **Fieldwork**
- **Playbook**
- **Checklists**
- **Reference Materials**
- **Email updates**
- **1-2-1 conversations with your coach.**

We separate education from application. The education part is delivered through pre-learning where they can read or watch videos to learn the content, and complete some online assessments to ensure that you retain the knowledge.

Application is where you will practice and apply the knowledge. This is undertaken in the classroom and with your coach, but more effectively, we issue you fieldwork which will walk you through applying your newly found skills and behaviours in your own role and gain feedback on how you are progressing.

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Tailor & bespoke programmes for your organisation

Maybe you already have a sales process that you use internally, or perhaps you have just designed and implemented a new competency framework for your organisation. In either situation it's essential that you, the organisation and the individuals taking part get the most out of any sales development and enablement programmes.

There's no denying that a bespoke development programme, focused around your own products, services, industry and market is likely to reap the greatest benefits. A programme that uses your language and is precisely aligned to your organisation is going to yield the most valuable information for you and your team to work with and take action on.

We can tailor and bespoke these, or any other of our programmes, for a wider rollout across your team or organsiation. Please do not hesitate to contact our customer success team to discuss your requirement in more detail.

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Why Salecology?

Salecology are the world's leading sales behaviour psychologists. We transform your team from the inside out. The Salecology methodology is the brain and applied behavioural science of building connections with your customers and influencing them to say YES, resulting in more sales.

At Salecology we offer a range of high impact services to help you and your company move from good to great. We have specialist expertise to help enhance and develop your organisation from individual sales improvement solutions to complete sales transformation. Our goal is to drive significant, sustainable impact that will accelerate your business and deliver top line revenue growth. We have an unbeaten track record in giving companies the edge they need to succeed.

Our clients rely on the Salecology to keep their sales forces at the peak of their game, and we've helped them to achieve double-digit growth throughout one of the toughest trading periods in history. No organisation can afford to stand still in today's constantly evolving business environment. So we don't. At Salecology we make it our business to keep up with the world's most innovative and successful approaches to selling – and to translate them into solutions that deliver sustain bye revneue growth for your business.

The Science behind Salecology

Neuroscience shows us that when two people are interacting their brains are unconsciously connected…

Unlike any other training in the world, Salecology brings together the latest thinking from the world of Science into the world of Sales.

For example recent findings from Neuroscience has shown that whatever I think or feel about something, that message is transmitted to the person I am communicating with through what is known as the Social Brain.

Bringing this into the business– we will assist you to develop a highly emotionally intelligent sales organisation that will be able to connect and build trust and rapport at an unprecedented level.

We don't teach so much the theory of the actual science, we are not trying to make them Neuroscientists (that's our job), but all of our training and programmes are designed to change the unconscious and conscious mind through the utilisation of the left and right brain. This will help your people to connect with customers on a deeper more meaningful level, building instant trust and rapport.

We help the practitioners change their communication styles to match the customer, help them consider how different customers will think, feel and behave, and coach the them on how to influence the customers mind and get to a Yes!

To learn more about our science see our brochure.

People Buy from People they Trust!

Testimonials

"Salecology's ability to really understand the key business challenges we face, together with their engaging learning style, have made an enormous positive impact with real tangible results in sales growth."

Hillary Harris
Chief Talent Officer
Reed Business Information

"Working with Salecology was a breath of fresh air. They took time to understand our business and our needs and developed a custom-designed training programme which we rolled out across the business with great success"

Gavin Cummy
Director of Sales Operations & Customer Service
LexisNexis

"Through deploying the Salecology programme, we successfully transformed our core New Business inside sales team by providing them with additional capabilities to engage with their prospects at greater levels. As a result our New Business performance, within this team alone, has increased by 277%."

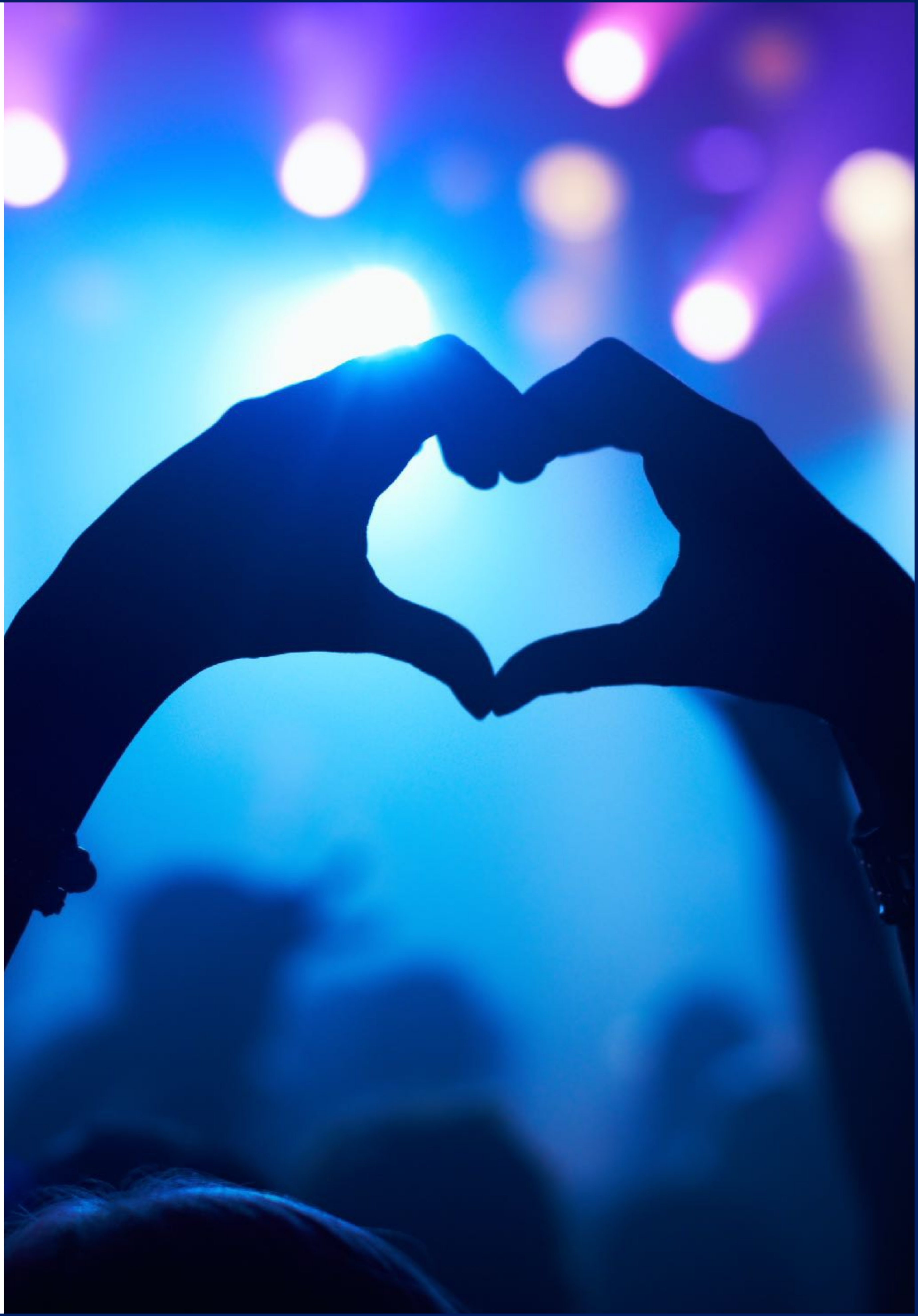
Steve Nicholson
Group Sales Director
XpertHR

My team loved it and thought it was the best training/ skills improvement session we have ever done and 6 months on I still hear the team strategizing on how to use different skills they learned during that week.

Merlin Piscitelli
Chief Revenue Officer
Merrill Corporation

"Salecology know how to turn good sales people into great sales people… resulting in a deeper understanding of customer needs."

Dan Barnard
Global Vice President of Sales
ICIS



We have delivered over $2bn of value to our clients

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Award-Winning Partner

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Salecology®

CONSULTING
TRAINING
COACHING
RECRUITING
ASSESSING

Salecology is your partner that applies behavioural and brain science to revenue generation programmes and services to improve your relations with your prospects, customers, donors, and to ensure you earn more revenue.

Our proprietary 'Salecology' provides you behavioural insights for your daily work with a focus on data-driven sales, customer / donor experience, marketing, communications, talent management and recruitment.

Not only do we provide consulting services, we also provide you training services and develop customised packages to get your team up and running in the behavioural psychology, neuro-sales, and neuro-fundraising methodology.

Salecology can guarantee you sustainable long-term success...

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