

6 STEPS TO CUSTOMER SUCCESS AT SCALE

MOVE BEYOND HIGH TOUCH

01 NARROW YOUR FOCUS

Serving all customers like your top 10 doesn't scale. Identify and segment customers into high touch, low touch, and even no touch if applicable. Decide how you'll handle existing low touch customers receiving high touch service today. Grandfather them in?

02 TALK TO CUSTOMERS

Understand what it's like to walk in your customers' shoes. What are their motivations and expectations throughout their journey? Use a customer journey interview template to get deep.

03 LEARN FROM CSMs

Talk to your top CSMs and find out what their special sauce is. Look beyond process for the emotional value they are providing customers. What are the make or break moments from their perspective? How do they show up in those moments?

04 MAP KEY MOMENTS

Bring key stakeholders together for a customer journey mapping workshop. Develop empathy by unpacking what you learned from customers and top CSMs. Pinpoint the moments that really matter. Use a customer journey mapping template.

05 BRAINSTORM LOW TOUCH

For each moment that matters in the journey, brainstorm new low touch ways to deliver the intended experience. Use brainstorming tips and tricks to get the team outside the box. Keep customers and key stakeholders engaged as you ideate the new models.

06 EXPLORE, PROVE, SCALE

How will you bring your new, low touch model to life? Will your existing platforms do the trick? Are new technologies or teams required? Design and test the model with a subset of real customers. Scale up as your confidence grows then operationalize your low touch model.