

# CUSTOMER SUCCESS ENABLERS



LATVIV

Keeping the Spark Alive™

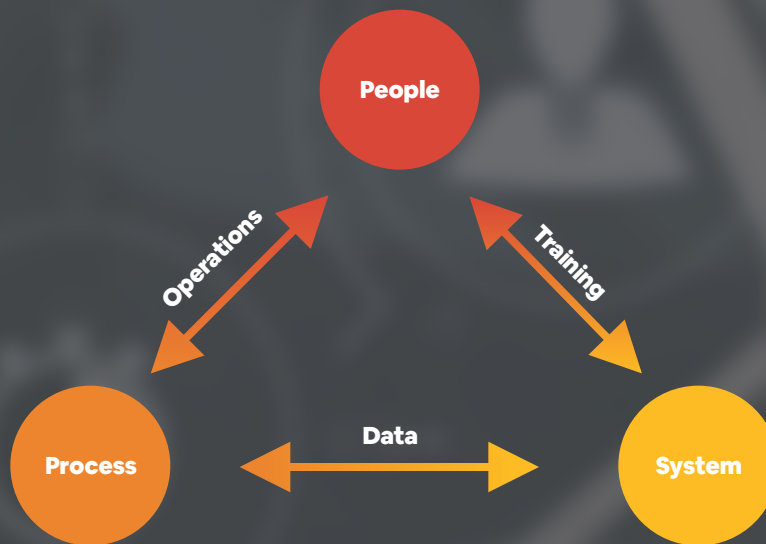


# Table of Contents

3	People
5	Process
7	Systems
8	About Latviv
8	Reliability and Better Security
8	The Latviv Difference

Latviv has compartmentalized customer success into three interrelated components: people, processes, and systems. It allows senior executives to ensure all parties working with the customers are hired correctly, trained well, and adequately supported by efficient company processes and technology solutions.

This framework allows vendors to study, prepare, setup, and analyze each component's effectiveness one at a time without getting overwhelmed by the full customer success initiative's enormity. The model comprehensively covers all elements required to make customer success teams successful. While we cover representation from both customer and vendor, the focus is on the vendor to put their best foot forward and address all gaps in these areas. We will touch on a few challenges and mitigating aspects for each element to explain the concept.



*Figure: Interaction Model - People Process and Systems*

## PEOPLE

A brief definition of all stakeholders involved in buying, selling, implementing, supporting, and using an enterprise solution will help get a perspective of each party that affects any project's success. The corporate world popularly calls each stakeholder persona or role. CSMS responsibility is to ensure that each of these roles is engaged, well taken care of, and pleased with the deployed solution. The prefix in the role title indicates if it represents a customer or vendor. Lastly, these are the key titles. Based on the customer and vendor's size and complexity, one individual can take on multiple roles or be part of a team representing a role.

### Role Definitions

Role Title	Role Description
Customer - Sponsor	Provides funding for the purchased software, service or solution
Customer – Decision Maker	
Customer - Influencer	Performs research on available industry solutions to address a customer need, makes a business case to consider one or more industry offerings and presents to other customer roles
Customer - Champion	Represents a body of end-users with similar needs, defines and articulates requirements, tracks implementation and realization of these requirements, and finally is involved in testing, rollout, training and ongoing hand-holding, post-deployment
Customer - Project Coordinator / Project Manager	On behalf of the customer, manages timecards, project tasks across all customer touchpoint phases, issue lists, collaboration with all customer roles involved, escalations, execution of customer side tasks, customer side communications and requests for information access from vendors
Customer - Solution Administrator	Post deployment, the administrator is trained to administer the vendor's product in collaboration of vendor's support team
Customer - End-User	Uses the vendor's product after it is fully configured to achieve desired objectives
Customer - Due Diligence Team	Combination of procurement, information technology (IT) and legal group representations, that in collaboration with other customer roles, reviews vendor financial, technical, staffing, security, privacy, administrative and all other relevant capabilities to continuously enhance and support sold product

Role Title	Role Description
Vendor – Sales Executive	Presents the product’s capabilities and vendor’s other strengths to convince customer roles to invest in the product
Vendor – Demand Generation	Through marketing efforts, obtains contacts of customer roles that are in the market for vendor’s products, and sends the information to sales executive for follow-up
Vendor – Sales Support	Prepares presentation materials, collects product collateral (brochures, case studies, white papers) from marketing and tag teams with sales executive to provide technical information to customer roles
Vendor – Product Management	Define and tailor emerging customer needs, make a business case to enhance the product, collaborates with engineering and development teams to develop the enhancement requests, collaborate with marketing and sales to sell the features and provide guidance to implementation and support teams to realize the features for customer needs
Vendor – Project Manager	On behalf of the vendor, manages timecards, project tasks across all customer touchpoint phases, issue lists, collaboration with all customer roles involved, escalations, execution of customer side tasks, customer side communications and requests for information access from vendors
Vendor – Implementation Manager	Configures and implements the solution based on specific customer requirements as gathered from the customer roles outlined above
Vendor – Senior Management	Monitor progress, provide guidance to staff to ensure customers are successful with vendor’s products
Vendor – Internal Audit	Audit all or shortlisted implementations using defined checklists and procedures. Document and present observations and suggested remediation solutions for projects that are not performing or have not performed well
Vendor – Support Team	Respond to customer queries, log change requests or issues that limit end users from successfully using the product
Vendor CSM	CSM is responsible for defining customer engagement strategy and plan, represents one or more of the vendor roles, is involved in all customer touchpoint phases, and is accountable for all customer-facing projects.
Vendor – Investor	Continuously evaluates vendor financials, retention rates, customer adoption, and success metrics.

The quality, availability, attitude, intent, compatibility, and incentives of all roles involved determine the outcome of any collaborative undertaking. Senior leadership should not only work on approvals, funding, and supervision, but also everyone's interests. We outline representative challenges and mitigating factors below.

People Challenges	CSM Recommendations
<ul style="list-style-type: none"> <li>• Competitive pressures from other vendors limit interest amongst customer roles in promoting your solution</li> <li>• Customer management priorities change reducing the availability of resources and information access</li> <li>• Insufficient skill set on the customer side to adopt the solution</li> </ul>	<ul style="list-style-type: none"> <li>• Engage all-new management team members</li> <li>• Stay on top of your game and continually engage with all key customer roles</li> <li>• Don't rest on your laurels. Incremental project task wins may not be enough for the full project success</li> <li>• Always go beyond talk, and show realized the value in every interaction</li> <li>• For implementations and deployments, plan to do more using vendor's resources with minimal help from customer</li> <li>• Plan to adequately train your end-users, even at extra non reimbursed vendor's expense</li> </ul>

## PROCESS

The quality of customer success processes influences the outcome. Senior leadership should design and execute customer success processes, have visibility of and contribute to the broader customer goals. While customers may successfully implement a vendor's product, the project will still fail if they do not realize their objectives. Regardless, the customer will stop the project, and the vendor may not achieve its revenue goals from the engagement.

Latviv proposes that every CSM pursue these high-level activities for every customer engagement.

Activity	Description
Build a Relationship	Using soft skill and a keen customer service mindset, make lasting friendships with customer roles. People see through pretenses, so make sure every interaction is genuine and well thought through.
Understand Business Context	Look for the customer and third-party resources allocated for the project, integrations with the customer and third-party solutions, level of funding and visibility, and larger goals in aggregate. This approach will help understand the dependencies, individual and overall risks facing the project.
Understand Real Problems	<p>Dig deeper to find out why the customer is investing in your product and other related initiatives. If it is not clear how the project and outcomes under consideration will help resolve customer pain points, ask sooner than later. If a customer's reasoning is flawed, call out ahead of time, so that realistic expectations can be set, and approaches fine-tuned before you undertake the project.</p> <p>You may have noticed that McDonald's installed self-order stations at its locations. What could be the real problems that these stations are trying to address? Is it to minimize the long queues, reduce labor cost for taking customer orders, reduce errors in manually collecting customer orders using service representatives, all of the above, or something else?</p>
Visualize, Deliver and Validate Value	<p>Before taking on the project, question the need and applicability of your product. Will it provide value to customer's initiatives? Only when you have an adequate response, bid for the project. After winning the project, follow through to the point:</p> <ul style="list-style-type: none"> <li>● solutions deliver value</li> <li>● customers validate value</li> <li>● all customer roles, involved with the project, acknowledge the value</li> </ul>
Manage Project Plan	Document designed project outcomes, activities, tasks, and milestones to achieve them. Provide continuous visibility and track through completion until you realize value.
Deliver Exceptional Memories	If executed well, all the above steps should result in superior customer experience and realization of customer end goals. When customer roles get rewarded with promotions and or higher compensation, due to your efforts, initiatives, intellect, and wisdom, customer delight and gratitude will help you achieve your ongoing revenue goals.

Customer end processes also influence the outcome of a project. We outline representative process-related challenges and mitigating factors below.

Process Challenges	CSM Recommendations
<ul style="list-style-type: none"> <li>Existing customer processes may not work well with your product’s capabilities</li> <li>Modifying customer processes may be a time consuming and expensive undertaking</li> </ul>	<ul style="list-style-type: none"> <li>If your product pricing is insignificant compared to the investments, the customer has already made in institutionalizing its processes, don’t attempt to change existing customer processes to fit your product capabilities</li> <li>Choose the least resistance approach: tailor your product to match the existing customer environment as much as possible</li> </ul>

## SYSTEMS

The vendor’s product itself and all supporting technology systems - their access and data - from both vendors and customers fall under this category. All support systems must provide seamless adoption and enable the new technology solution to achieve customer’s objectives. Systems underpin the interactions with the other two framework factors: people and processes. Refer figure: Interaction Model - People Process Systems

People should be adequately trained on the relevant systems to use them effectively. Systems should be aligned with customer processes to support ground operations, such as manufacturing, people interactions, buying, selling, and distribution. Relevant parties should receive the secure transfer and access to data from operations.

End-users need to use the system for the project to be successful. Once end-users readily accept the product, it will sell on its own. Champion end-users will naturally talk about their successes with their colleagues and promote your solution through word-of-mouth.

**Latviv can help you manage this people–process–systems framework with its best in class software, content and services.**

**Schedule a demo and get trial access for your team.**



## ABOUT LATVIV

Latviv is a provider of customer success management solutions and services, available as a cloud deployment option.

Latviv's solutions increase customer retention rates, boost upsell, cross-sell, and new license revenue, and help engage with prospects, with appealing customer success results.

## Reliability and Better Security

The Latviv platform rides on the Google Cloud. Google provides cloud services reliably due to its experience operating its core services like Google Search. Security controls in the Google Cloud isolate and better protect data by various methods such as compartmentalization. The Google Cloud Platform meets the most stringent data security and data center reliability standards like SSAE16 and ISO27001, a level of protection that few corporate data centers can match.

## The Latviv Difference

Latviv's SAAS platform passes the multi-tenant architecture cost savings to its clients, with an appealing pricing strategy. Latviv's scalable architecture and unique design make it easy to support its multiple client implementations on the same server instance. Each of Latviv's clients can, in turn, manage an unlimited number of their customers and engagements.

Latviv provides a rapid jump start through prebuilt content, relationships—of system elements outlined above—story tracks for working with all stakeholders, templates, and customer setup examples. System users can copy relevant content, update for their situation, and start using the system.

The platform uses an advanced decoupling framework to create a Lego block paradigm that Latviv users can use to create graphs, and capture disparate metrics, joined together in user-determined dashboard views. With this highly flexible approach, users can create and articulate stories the way they want and link references to them to any system element.

Ask for a demo or better still, ask for free access. See it to believe it!

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