

CUSTOMER SUCCESS PERSONALITY



LATVIV

Keeping the Spark Alive™



Strong relationships with customer contacts are central to driving ongoing revenue from customers. So, what is the key to build such relationships? Positive attitude and customer service personality form the bedrock foundation of all successful customer-facing personnel. This eBook explores customer expectations, customer success manager (CSM) skills, approaches, and mindset required to be successful in a CSM role and bond with their customer contacts. The person who fills these shoes must keep the customers' needs and expectations in mind while balancing their different skills and approaches and maintaining a positive mindset.

Latviv advises vendor resources to follow best practices, risk assessments, checklists, and templates to pursue a consistent approach for managing customers. This eBook outlines a few best practices on this topic. The full list of these elements is prepackaged in the Latviv platform.

EXPECTATIONS OF A CUSTOMER SUCCESS LEAD

Customers expect their vendor points of contact, especially those holding the title Customer Success Manager (CSM) or an equivalent position, to be their trusted advisor. A few of the many hats expected to be worn by this person include:

Advocate:

Customers want this person to represent their interests within the vendor's organization, mainly when the customer submits product enhancement requests. CSMs should follow through on the enhancement requests, check the feasibility of undertaking these

enhancements and update their customers on the likelihood of addressing these requests. If involved customers are invested in the vendor's solution and are trying to suggest enhancements, CSMs owe it to them to provide an adequate response to their suggestions and potentially take them on as a research and development effort.

Technical Advisor:

All stakeholders involved in customer engagement expect the customer success individual on their own or in consultation with product experts to provide the most optimal solution for customer's needs.

Project Manager:

The customer success contact should be a strong project manager with a go-getter mindset. The person should have executive leverage to push through both vendor and customer end action items. Collaboration, task sequencing, time management, and follow-through are essential skills to drive project success.

Confidence Booster:

The person should infuse confidence that customer-specific requirements have been successfully addressed with other customers by the vendor.

Facilitator:

CSM should be socially intelligent, lead conversations effectively, bring people together, have good de-escalation skills, and diffuse heated exchanges or tense situations. The person should respect everyone else's inputs and have a calm demeanor to handle any heated discussion.

Visionary:

CSM should provide a clear vision for execution and progressively lead customers successfully to that projected end state.

Troubleshooter:

It is the job of the customer success manager to anticipate issues before they realize and proactively stop or mitigate them depending on the situation.



Strong Communicator:

Verbal eloquence, coherent thinking, and persuasive writing skills differentiate an impressive customer success personality from a mediocre one. CSM is a strong listener and observer, keeping themselves informed about everything related to the project. They look for visual cues and body language of all project stakeholders when interacting with them.

Trainer:

The CSM loves to learn and then share the knowledge that they acquire from across customer engagements. This person does not shy away from reading and learning about all aspects and perspectives of an industry domain. An educated and informed person comes across as a well-rounded personality and commands respect. They manage the collective representation of the vendor's knowledge and expertise by bringing in appropriate resources at relevant times during customer conversations. For instance, during the Rollout phase, CSMs lead the overall training program and bring in technical resources to cover respective technical details.

When customers feel confident that their customer success manager is on top of all things relevant, they automatically become passionate and bind themselves to the successful execution of the project.

➤ Key Takeaway:

- The customer needs to know that their concerns have been heard and are being addressed.

EMOTIONAL INTELLIGENCE

Social skills and empathy are crucial skills for developing healthy relationships with customers. They come in handy during tricky situations that invariably come up during customer conversations. Latviv team has seen many relationships go sour, despite the best technical resources and vendor solution capabilities, due to vendor personnel's perceived arrogance and behavior during customer interactions. For instance, recent success can adversely affect the assigned resources' attitude. During such times, when a vendor and its resources have experienced unprecedented success lately, modesty is a desired trait. We touch on two examples below, where the superior emotional intelligence of vendor personae helps customer relationships.

Customer Requests and Ideas

Intently listening to customer requests and ideas go a long way in building strong relationships with customers. In most cases, customer requests are valid, so:

- Let customers deliver their message entirely.
- For product enhancement requests, do not make and present one's own theories.

Let the product managers and product marketers prepare that talk track. If CSMs bridge these roles, they need to make sure the talk tracks are agreed to by everyone in the vendor leadership team before CSMs relay them to the customer.

Emotionally Charged Situations

Managing a team of passionate and committed team members has its challenges. When everyone is moving in the same direction with a common viewpoint, projects are easy. During differing perspectives, people with strong opinions can become frustrated when other people don't share them. They may tie the interest of the project to their view and they may come out hard on other project stakeholders, both on the customer's and the vendor's side, potentially resulting in hard feelings all around. In such cases, a person who can mediate effectively becomes key to diffusing the situation. As a lead CSM on the customer account, this becomes CSMs responsibility.



When faced with such emotionally charged situations, it is best to put one's own emotions aside. CSM should request their team members to be calm. Urge them to think, wait for some time before they say anything or send emails when angry.

➤ Key Takeaways:

- Listen intently to customer requests and ideas
- Keep conversations with the customer as positive as possible
- Think, wait for some time before anyone says or sends email when angry

CUSTOMER SERVICE MINDSET

The customer success role exists to make the customer successful. Successful leaders understand that they exist because of their customers and will do everything to serve customers' professional needs. In relationships, one person's success drives the other party's success. Customer

personnel assigned to the project represent the customer, and their professional objectives become as essential as that of the customer organization represented by them. CSMs should first and foremost watch for customer personnel's professional needs. When everyone's interests are aligned, projects run smoothly. In the eBook "Customer Success Enablers" on Latviv's website in the Process subchapter, Latviv highlights six high-level activities that should underpin all interactions with customers. These activities will ensure the achievement of both customer and customer personnel's goals.

Every individual seeks attention. CSM's job is to provide that, keeping the focus on the customer. Latviv team has seen occasions where vendor personnel boast about their titles, awards, and other achievements. Such actions become unproductive and run counter to the desired effect. Highlight achievements and roles that are only in the interest of the customer and related projects.

When CSMs always remember that their role exists to make the customer successful, they will automatically incorporate the right customer service mindset to incorporate the guidance outlined here.



➤ Key Takeaways:

- Customer Success role exists to make the customer successful.
- CSMs are working with the customer to serve their organization and are paid for that effort. Everything else is extraneous.

Latviv can help train your new hires with its best in class software, content, and services.

Schedule a demo to learn how this is possible 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 up-sell, 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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