KICKSTARTING
IMPLEMENTATIONS

LATVIV
Keeping the Spark Alive ™

The CSM role becomes prominent, starting with the implementation phase. Depending on the resource allocation and size of the vendor, the CSM role could be distinct from the other vendor personnel (refer "Customer Success Enablers" eBook on the Latviv website), or it could overlap. For instance, CSM could be technical and can act as an implementation manager and product manager. Alternately, CSM could play a supervisory role, akin to the senior-most staff at large consulting organizations.

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 Implementation best practices and risk assessments. The full list of these elements is prepackaged in the Latviv platform.

OUTCOME MANAGEMENT

Building on the outcome concept, clearly defined and realistic goals are vital to the success of any project. All parties involved need to document desired outcomes based on the resources, time constraints, skills, and capabilities of the people, process, and systems under consideration, tying back to the customer success framework (refer "Customer Success Enablers" eBook on Latviv website). Simplicity in the documentation, talk track, negotiations, requirements, and project planning will help everyone.

Parties involved need to negotiate what is possible given constraints, and then build project plans keeping this desired end in mind. Once the execution framework is in place, project managers from all parties need to continuously monitor and course correct knowing fully well that particular objectives may need adjustment, as they attain visibility during project execution. This flexibility is essential from project sponsors. Reasonable and mature executives understand this expectation and are willing to reorient project requirements if the implementation team provides effective alternatives and understandable justifications.

CONTINUOUS LEARNING

Continuously updated documentation with audit trail will set up projects for success. In the worst case, if projects fail under the worst unpredictable conditions, or when

circumstances are beyond the involved team's control, this audit trail will save ground-level resources and supervising executives from rigorous postmortem analysis of failed projects.
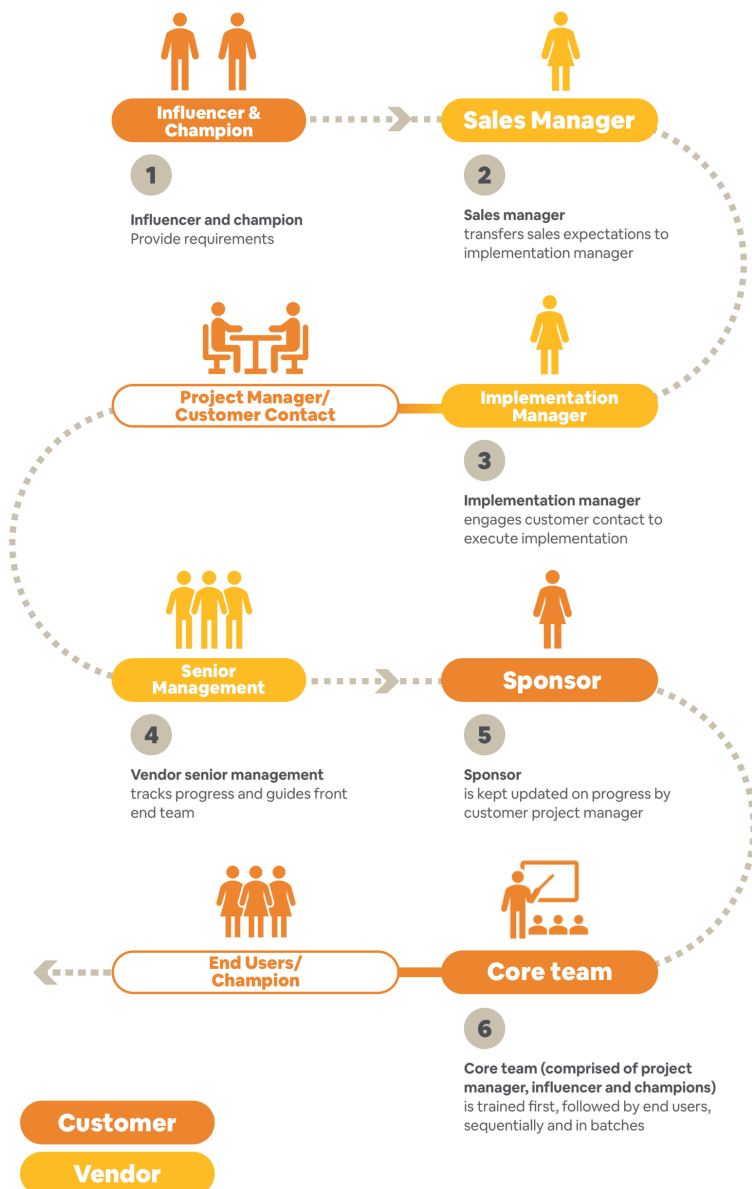
Success and failures are part of a mixed bag. The execution team can avoid losses, but when people attempt to chart uncharted territories, unexpected circumstances do occur. In this situation, it is essential to stand up again, learn, course correct and keep going. Success is built on failures, brick by brick, and in the case of customer success function, one customer at a time. The entire organization should support customer success function during adversities. Lessons learned from both successful and unsuccessful deployments will pave the way for the next successful one.

TYPICAL IMPLEMENTATION PROCESS

Most vendors have a good handle on their respective implementation processes. Accordingly, Latviv has drawn the figure below to provide an overview of a typical implementation model, while focusing primarily on overcoming challenges experienced during execution.

Outcomes need to be supported by detailed requirements and business analysis. The vendor's senior management should transfer the information collected during the sales phase to the personnel involved in the implementation phase. Customer influencer, champion, sponsor, and project coordinator personnel should stay engaged during the implementation phase and beyond to establish this continuity. This customer group is explicitly called out in most vendors' implementation framework and given vendor-specific names for reference, such as the Tiger team. The actual name doesn't matter. Latviv will use this name to reference this customer group in this eBook. The Tiger team establishes a reporting hierarchy among themselves to collaborate with the vendor personnel and to communicate within the group. It works with the vendor to transfer requirement details, clarifications as and when requested by the vendor personnel. The vendor's sales team accordingly shares the information they collected during the sales phase.

The vendor's implementation manager and customer project coordinator collaborate to distill requirements into actionable tasks and communicate the resulting project plan to all stakeholders involved. Vendor's senior management and customer sponsor, review plans, monitor progress and guide respective sides. This senior staff handles escalations between customer and vendor resources. For training-related activities, vendor personnel first train representatives of the Tiger team to validate the solution, its value, and prepared training materials. Tiger team representatives are typically on point to teach the rest of the end-user community. Latviv recommends that the vendor stays involved in training as many users as it can while maintaining professional services cost.

1 Influencer & Champion
Influencer and champion
Provide requirements

2 Sales Manager
Sales manager
transfers sales expectations to implementation manager

Project Manager/ Customer Contact

3 Implementation Manager
Implementation manager
engages customer contact to execute implementation

4 Senior Management
Vendor senior management
tracks progress and guides front end team

5 Sponsor
Sponsor
is kept updated on progress by customer project manager

6 Core team
End Users/ Champion
Core team (comprised of project manager, influencer and champions) is trained first, followed by end users, sequentially and in batches

Customer
Vendor

IMPLEMENTATION RISK ASSESSMENT

The implementation phase requires a combination of technical and, most importantly, soft skills to be effective. The challenges outlined below can be overwhelming for technical staff. Senior CSM resources should handle them. The guidance provided in the Latviv platform will help CSMs think through and prepare situation-specific remedies for these and other challenges outlined herewith.

- Potential change of guard on customer end resulting in motivating challenges, failure to proceed, and lack of timely responses

- Changed or unclear requirements

- Personal chemistry issues or cultural differences between customer and vendor contact

- Dropped balls affecting the credibility

  Lack of visibility for stakeholders

- Usability issues, missed requirements, and delays

- Coordination, accountability, and team turnover

- Inadequate notes resulting in communication gaps

IMPLEMENTATION TEAM SETUP

Most vendors know how to staff their projects from their end. They also prepare and publish a good list of participation roles from the customer side too.

For reference, depending on the scale of the project, vendor side participation may include a vice president, consulting partner, architect, project manager, and technology resources both onsite and offsite. Customer side participation may consist of a corresponding project manager, champion end-users, project sponsor, a team of supporting domain experts, infrastructure security resources, and more.

While it may sound obvious, Latviv recommends that projects be staffed well, even under cost constraints. Project governance or team setup gaps on either side–vendor or customer–can make or break tasks. High priority projects should receive appropriate attention from key company leaders from both vendor and customer end. In addition to project staffing, access to data and supporting systems should be authorized and supported by the right individuals from both organizations.

Customer organizations have competing priorities and fight political battles internally to access the meager resources required to complete existing projects. New projects typically get scant or minimal attention. Nice to have solutions even if agreed and contracted with effective sales tactics are always pushed to the end and hard to get off the ground.

➤ Key Takeaways:

- Project governance is important

- Nice to have projects will always receive scant attention

- Vendor will need to leverage superior customer success skills to rise in priority

CUSTOMER GUIDE DURING IMPLEMENTATION

As a buyer and potential adopter of technology, the customer contacts look for guidance from vendor personnel during implementation conversations. During the sales phase, they have sat through a few product demonstrations and would have formulated opinions about vendor products, but do not have clear visibility of the implementation roadmap. Vendor personnel taking the lead during implementation conversations should prepare themselves to take on the customer guide role.

To effectively execute this responsibility, vendor resources need to be trained, both in theory and practice, and need to be thoroughly conversant with the implemented solution's quirks, nuts, and bolts.

Before we teach others, we need to make sure we understand what we are teaching. Implementations fail when insufficiently trained vendor personnel take on customer-facing roles. Before taking on customer-facing roles, such individuals should implement the solution themselves either in a sandbox with as realistic real-life data as possible, or better still, have

implemented deployed and realized success at another customer. The more individual success stories CSMs can experience themselves, the better. It will help them establish and leverage credibility in all their future implementations.

➤ 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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