

# Checklist for Customer Success Excellence

*Whether you're refining your practices or just starting out, use this checklist to evaluate your Customer Success function compared with other functions at top-performing organizations. Be honest in your answers! When you deploy, manage and improve these seven systems, you'll achieve maximum results.*

**FOR EACH QUESTION, CHECK THE BOX IF THE ANSWER IS "YES":**

## 1. Sensory System

- Have you segmented and prioritized your customer base, analyzing how groups are alike and different?
- Have you defined personas (various buying and using roles) for each of your segments?
- Have you implemented multiple listening posts (surveys, online ratings, business reviews, user groups, etc.) to gather and interpret customer feedback by segment and persona?
- Do you consistently capture, track and systematically follow up on customer complaints and comments, ensuring customers know what actions you took?
- Do you analyze customer defections by segment, reason, and competitor?
- Do you use your analyses as input to your corporate and functional planning processes?
- Do you periodically revisit your assumptions about customer needs and preferences throughout their life cycle?

\_\_\_\_ Total checked

## 2. Planning and Review System

- Have you documented a Customer Success plan that describes your short-term and long-term goals, objectives, strategies, tactics, metrics, owners and timelines for growing and improving your function?
- Does your Customer Success plan articulate specific changes in processes, technologies, staffing and training and what is required to implement them?
- Do the improvements stated in your plan enhance your company's Value Proposition(s), competitiveness and sustainability?
- Are your Customer Success goals and objectives aligned and integrated with your firm's overall business plan and key work processes?
- Do you have a tracking system to monitor and report plan execution and results?
- Do you conduct formal, periodic progress reviews to monitor execution, make adjustments, and promote accountability and organizational learning?
- Do you periodically and systematically share status and results with other functions in your organization?
- Do you review and improve your planning and review process each year?

\_\_\_\_ Total checked

### 3. People System

- Have you documented your CSM job descriptions with roles, responsibilities, performance metrics and expectations?
- Do your compensation, reward and recognition policies encourage the appropriate behaviors?
- Do you formally and informally review individual CSM job performance?
- Have you established development plans, including employee onboarding, short-term and long-term training programs to build CSM knowledge and skills?
- Do your customer experience process requirements and gaps define your required staffing levels, knowledge and skills?
- Do you measure and improve the effectiveness of your learning and development programs?
- Do you use formal methods to screen job applicants for required knowledge, skills, and personality traits?
- Do you measure employee engagement and satisfaction periodically and take action on the results?

\_\_\_\_ Total checked

### 4. Work System

- Do your customer segments and personas define requirements and expectations (explicit and implicit) for your customer experience design?
- Do you associate customers with their respective segments early in the life cycle and manage the appropriate customer journey for each?
- Have you mapped your customer experiences from first contact through renewals, incorporating cross-functional tasks, handoffs and UX?
- Have you defined and implemented appropriate controls, essential data/documents, triggers and metrics in your workflows?
- Have you studied and optimized your human and technology resources according to appropriate phases in the customer experience?
- Do your work systems help to fulfill your company's Value Proposition(s) and increase competitiveness?
- Do you formally evaluate and manage your key providers (internal and external technology, staffing, learning and development entities) that support your work systems?

\_\_\_\_ Total checked

### 5. Metrics System

- Have you defined a critical (and limited) set of metrics to indicate current status, long-term performance improvement or degradation for a range of factors (financial, usage, achievement of customer goals, customer satisfaction and loyalty, timeliness, employee satisfaction, etc.)?
- Does your metrics dashboard include a mix of both leading and lagging indicators?
- Do some dashboard metrics track progress on key initiatives articulated in your corporate and departmental plans?
- Do some metrics track the fulfillment of your company's Value Proposition(s)?

- Have you calibrated your metrics system to appropriately indicate when management action is required?
- Do you regularly review and act upon your metrics?
- Do you periodically benchmark your results vs. relevant competitors and best-in-class performers?
- Do you occasionally make refinements in your selection and use of metrics?

\_\_\_ Total checked

## 6. Continuous Improvement System

- Do you use formal methods to analyze results, uncover and verify root causes of both good and bad performance, execute improvement projects, compare improvement outcomes vs. goals, and make further improvements?
- Does your analysis appropriately separate systemic (e.g. process, technology, policy, customer variation) from individual CSM performance factors (attitude, knowledge and skills)?
- Do your improvement efforts trend towards upstream prevention and design vs. downstream detection and remediation?
- Do you systematically collect, analyze and present feedback collected by Customer Success to other departments for improvement in your company's products and services?
- Do you periodically and formally review your processes for simplification, innovation, automation and cost reduction?
- Do you set aside time each week exclusively for process improvement execution?
- Do you promote and assist in continuous improvement efforts with key departments, customers, suppliers, and partners?

\_\_\_ Total checked

## 7. Leadership System

- Do leaders articulate and continuously reinforce the organization's vision, values, priorities and plans?
- Do leaders' actions reflect their commitment to the organization's values and demonstrate responsible, legal and ethical business practices?
- Do leaders create growing and sustainable operations by ensuring the accomplishment of goals?
- Do leaders emphasize participation, high performance and learning?
- Do leaders foster better customer relationships and support key communities?
- Do leaders communicate frequently and openly, encouraging feedback and candor from employees, customers, partners and key suppliers?
- Do leaders actively drive organizational change and continuous improvement in products, services and customer experiences?
- Is a C-level executive responsible for systematically reviewing and improving your workflows and results?
- Do leaders develop and coach subordinates and hold them accountable for their performance?
- Are leaders reviewed, developed, and held accountable for their own performance?

\_\_\_ Total checked

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**Total the results:**

\_\_\_\_\_ **Sensory System**

\_\_\_\_\_ **Planning and Review System**

\_\_\_\_\_ **People System**

\_\_\_\_\_ **Work System**

\_\_\_\_\_ **Metrics System**

\_\_\_\_\_ **Continuous Improvement System**

\_\_\_\_\_ **Leadership System**

\_\_\_\_\_ **TOTAL**

**How did you do?**

0-14: There's work to be done!

15-29: Making progress

30-44: High performance

45+: World Class!

**About Service Excellence Partners**

We help increase customer loyalty and business performance in the cloud computing industry. We help clients diagnose root causes of problems across the enterprise and then help systematically improve products, processes, and customer experiences. When it comes to management systems, we help clients implement proven techniques, such as *hoshin kanri*, enterprise dashboards and Lean Six Sigma, leading to a culture of high performance. Contact us today to learn more:



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