HOW TO CRUSH SAAS CUSTOMER ONBOARDING:

A Roundup of Expert Advice

CHURNZERO

SaaS onboarding makes or breaks your customer retention. It's a learn-or-churn, adopt-or-get-dropped experience for users.

Onboarding has a long-lasting impact with deep ties to a customer's likelihood to churn. For this reason, everyone is trying to crack the code on how to create the optimal onboarding experience. Exactly how do you get customers to embrace your product instead of merely moving (erm, politely pushing) them through the motions and hoping for adoption?

That's what we set out to ask the Customer Success experts. Because one of the best ways to learn is from those who have already achieved what you're trying to do. They're intimately familiar with the struggles faced, missteps made, and "had I only known sooner" pangs felt along the way. So, learn from the failures (and successes) of others whenever you can; then, go make your own.

Lastly, a parting word of advice: the best way to take best practices is with a grain of salt. What works for others may not work for you, and vice versa. Always adapt best practice learnings with your context and constraints in mind. Now that we've set your expectations, let's dig in.

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IN THIS EBOOK, Customer Success experts share their best advice on how to:

HOW TO WORK CROSS-FUNCTIONALLY

with other teams during onboarding

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“High customer loyalty is achieved by design, not by luck.”

Ed Powers

Customer Success Consultant

“Onboarding is very important, but it’s just one of many essential phases in the customer experience. Developing a shared understanding and a shared commitment to improve the customer experience is an essential first step. High customer loyalty is achieved by design, not by luck.

“I begin by getting alignment with the CEO and senior functional leaders to work cross-functionally to create a superior customer experience. If possible, interview and record a sampling of customers who tell the journey story from their own perspectives.

“Clarify their most important effective (logical, task/goal) and affective (emotional, wants/preferences) needs in addition to their perceived pain points. Then, recruit team members from each function to participate in a customer journey mapping session.

“The team reviews the customer feedback/recordings and maps the internal workflows, checking to ensure both types of customer needs are met. The team then refines which roles are responsible and accountable at specific points in the journey. We also define metrics, process controls, and improvement opportunities.

“The functions you involve in onboarding depend on many different factors, including the segment, the product’s complexity, the customers’ expectations, and the economics.

“For example, in low-touch, high-scale markets, Marketing and Product/UX play a dominant role in automating the process. But in high-touch, complex markets, Sales/Account Management, CSMs, and Professional Services tend to be in the forefront executing manual tasks.”

- Ed Powers, Customer Success Consultant

"Getting as much detail as possible from the Sales Rep is great, but they must be able to answer: Why did the client purchase, and what was the process?"

Megan Macaluso

VP of Customer Success & Operations
ESG Success

"The handoff from Sales to Customer Success during onboarding is one of the most critical aspects of ensuring the customer experience is positive from the start. Before they were your customer, they were a prospect. Your Sales team demoed your product like the champs they are, addressed every question quickly, and assured them they were making a sound and smart financial decision. But Sales cannot just throw the customer over the fence and run. They play a critical role at the beginning of onboarding and need to effectively communicate with both the customer and the assigned CSM to ensure the transition is smooth.

"The Sales Rep should introduce the new customer to their assigned CSM — via a group phone or video call, or via email if that's not feasible. They should share everything they know about the prospect-turned-customer with the CSM. Getting as much detail as possible from the Sales Rep is great, but they must be able to answer: Why did the client purchase, and what was the process? This will help the CSM understand the pain points and business outcomes that drove the company to work with you. Bonus points if the Sales Rep can identify the purchaser versus the end user for the CSM."

- Megan Macaluso, VP of Customer Success & Operations, ESG Success

Mikael Blaisdell
Executive Director
The Customer Success Association

Kristen Hayer
Founder & CEO
The Success League

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"For low-touch or digital Customer Success programs, Product needs to be involved in building a streamlined onboarding process that is as self-service as possible."

"The key onboarding factor that has a bearing on the activities of Marketing and Sales is the proper and consistent setting of customer expectations from the beginning. This is where the data developed by the Customer Success team in the course of all onboarding projects needs to be carefully collected, analyzed, and disseminated. The conversation between Customer Success and Product/Development is about how to make the onboarding process easier and must also be solidly based on the data gathered across all implementations."

- Mikael Blaisdell, Executive Director, The Customer Success Association

"For low-touch or digital Customer Success programs, Product needs to be involved in building a streamlined onboarding process that is as self-service as possible. Even for high-touch programs, Product should think about how to make the onboarding experience smooth and fast. Marketing helps with messaging during onboarding to keep customers on the desired path and from stalling out during the early days. They also build messages that help customers through the inevitable change management process that comes with adopting a new tool."

- Kristen Hayer, Founder & CEO, The Success League

HOW TO SEGMENT

customers for onboarding

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Bri Adams

Customer Success Team Lead
ChurnZero

Kia Puhm

Founder & CEO
DesiredPath

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"Identify what a customer genuinely needs to know during onboarding to achieve their business objectives. Then, align your onboarding objectives accordingly."

"At ChurnZero, we purposefully segment our customers into three main categories during our onboarding experience. First, our Decision-Makers and Executive Sponsors. They will receive a minimum of four brief updates throughout the onboarding process, which is typically led by our second segment: ChurnZero Champions. This segment is usually our Primary Contact for day-to-day interactions as well as the people on the team who will be our ChurnZero Admins and eventual ChurnZero Experts and Evangelists. Last, but certainly not least, is our User segment. This segment is comprised of anyone who will ever log into ChurnZero, whether to review a dashboard as a people manager or conduct their daily responsibilities, like a CSM. As a team, we interact with each segment for different purposes, and we have specific communication that goes out to each audience, so we always provide the optimal value based on a customer's role."

- Bri Adams, Customer Success Team Lead, ChurnZero

"To start, you can segment customers by their adoption needs and/or business maturity. Identify what a customer genuinely needs to know during onboarding to achieve their business objectives. Then, align your onboarding objectives accordingly. A customer's technical or domain proficiency should influence the focus of their onboarding. For example, if a customer displays deep technical expertise don't waste their time on basic onboarding information. Adapt to their level of mastery and share product use cases that match those needs."

- Kia Puhm, Founder & CEO, DesiredPath

“It’s key to remember that each persona’s needs and value perceptions vary, so the SaaS company must have an approach to engage all of them appropriately and effectively.”

Ed Powers
Customer Success Consultant

Michael Sutherland
VP of Customer Experience
Groove

“My approach is to segment first by markets and tiers, and then determine personas by customer journey phase. In B2B, these personas typically take the form of economic buyers, champions, users, and technical influencers who appear at various points along the way. As participants in the Decision Making Unit (DMU), they ultimately decide whether to renew the contract or buy more. Who on the customer side specifically is involved can vary greatly by segment and product type. It’s key to remember that each persona’s needs and value perceptions vary, so the SaaS company must have an approach to engage all of them appropriately and effectively.”

- Ed Powers, Customer Success Consultant

“Groove was built to be highly configurable for different types of users, so segmenting our onboarding on a team-by-team basis is essential. As a sales engagement platform provider, we typically deploy to Account Executives, Sales Development Representatives, CSMs, and their respective leadership teams – all of whom use the product differently and require different kinds of customization. After a strategic kickoff with everyone involved, we then transition to onboarding each team separately so we can get a deeper understanding of their expectations and goals. This more focused information sharing plays a critical role in helping us configure the solution properly for their team and train each individual according to how they will actually use it.”

- Michael Sutherland, VP of Customer Experience, Groove

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HOW TO DEFINE AND CORRELATE

key onboarding events to your customers' success

CHURNZERO

Jason Whitehead

CEO
Tri Tuns

"Many customers focus on technical success, but it's even more important to focus on their business outcomes using the technology."

"Define your customers' success in terms of technical success versus business success. Many customers focus on technical success, such as getting functionality working, setting up integrations, loading data, and launching the system on time and on budget. While these are essential, it's even more important to focus on the business outcomes customers achieve using the technology.

"Help customers distinguish their technical tasks from their business outcomes, such as increasing sales and market share as well as lowering the cost to serve customers. For each business success goal, ask the customer how and when they will measure their outcomes. Ensure they create a baseline for metrics before go-live to track and measure progress.

"Customers also need to map the internal activities required to drive user adoption and business outcome achievement. Ask customers to create a realistic timeline to complete these activities while considering their organizational constraints. Get your customers to commit the necessary time and resources to complete these activities."

- Jason Whitehead, CEO, Tri Tuns

Cece Renick

Customer Success Manager
Chili Piper

Ed Powers

Customer Success Consultant

CHURNZERO

"I always love to ask my customer what they need to look like a rock star in their own organization. My goal is making sure we then make that a reality."

"It's important to remember that even though we have key metrics for what the success of a customer looks like, they too have their own measure of success in an organization. It's imperative we know right from the start the number one problem they purchased our software to solve. If we don't know that, it doesn't matter what other key metrics there are. I always love to ask my customer what they need to look like a rock star in their own organization. My goal is making sure we then make that a reality. We're successful when they're successful."

- Cece Renick, Customer Success Manager, Chili Piper

"Ideally this is done before the contract is even signed. In fact, Deloitte's recent Customer Success study says 90% of enterprise buyers expect it, but only 20% are satisfied when it's actually done. According to the study, only half of buyers say their business goals are met or exceeded, and 60% say SaaS providers don't help track goal achievement. This is appalling. Articulating the business problem and how to measure its achievement is one of the most important steps in the sales process. Unfortunately, most salespeople today are poorly trained. Salespeople must learn to sell solutions, not products.

"Besides better sales training, one best practice I've used is having salespeople introduce the customer's CSM when the deal is at the final commit stage. Confirming the customer's intended goals, sharing a draft of the Customer Success plan, and explaining the CSM's role to ensure success and satisfaction is a great closing technique. It helps the economic buyer feel more confident about signing on the dotted line. After the sale, the CSM simply refines and uses the success plan to track and report progress achieving the goals."

- Ed Powers, Customer Success Consultant

HOW TO ACCELERATE

time to value with your product during onboarding

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Bora Lee

Customer Success Operations Team Lead
ChurnZero

Ed Powers

Customer Success Consultant

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“Focus on the critical trifecta – identify what is important to the customer, set clear expectations, and measure success to accelerate time to the initial value.”

“At ChurnZero, we focus on the critical trifecta – identifying what is important to the customer, setting clear expectations, and measuring success to accelerate time to the initial value. We start by listening to really understand our customers, tailoring the onboarding roadmap to their needs, and helping them become a champion for change within their organization. Then, we take what could be an overwhelming process and break the implementation down into manageable milestones and quick wins that build confidence and garner buy-in from stakeholders. At every point in the customer’s onboarding journey, the continuous automated monitoring of key metrics enables crucial engagement at relevant times to keep the customer accountable and on track while speeding up the value achieved. The journey does not end there – this is just the strong foundation that allows our customers to see sustained and continued success in the long term.”

- Bora Lee, Customer Success Operations Team Lead, ChurnZero

“Most recently in my role at InteliSecure, we reduced Time to First Value by a factor of 12 by changing from a ‘waterfall’ to an ‘agile’ implementation process. Rather than deploy all aspects of the solution at once, we sequentially deployed functionality along the way. Customers could see fast initial results which motivated them to deploy the remaining capabilities. After redesigning our process, we found that customers themselves were the ones in the ‘critical path’ — progress depended on their ability to execute quickly, not ours.”

- Ed Powers, Customer Success Consultant

“End users need to immediately understand the value they get from the product during onboarding.”

Irit Eizips

Chief Customer Officer
CSM Practice

“There are two types of customer value that Product teams can measure through the onboarding process to accelerate time to value: ‘minimum value’ and ‘real value.’ ‘Minimum value’ is the smallest value that can be seen from customers while ‘real value’ is the value that the product actually brings or what the customer considers as necessary to their business.

“When onboarding a strategic customer, the implementation process should concentrate on how to address a particular problem instead of the full spectrum of problems the customer ultimately needs to solve. This approach promotes quick wins and thereby accelerates time to realized value. When the first value is delivered, the Customer Success team can then focus on additional use cases, which speed up the time that happiness is given to clients.

“However, end users need to immediately understand the value they get from the product during onboarding. As such, the Product team plays an important role in ensuring that end users quickly gain that first value in their first login experience. If they can’t quickly see this value, the likelihood to adopt the solution drops significantly. Product teams can support a successful end-user onboarding experience by providing an easy-to-obtain, powerful use case during the first login.”

- Irit Eizips, Chief Customer Officer, CSM Practice

“Start by asking customers: Who in your organization is accountable for ensuring the adoption of technology and the achievement of business outcomes?”

Jason Whitehead

CEO

Tri Tuns

“To accelerate value for customers, help set up their internal user adoption/internal success team. Many software buyers do not understand what it takes to drive change and adoption. They often lack the expertise and processes necessary to achieve value and to do it quickly. Start by asking customers: Who in your organization is accountable for ensuring the adoption of technology and the achievement of business outcomes? If your customer can’t answer this question, help them identify an appropriate resource who will own the post go-live success.

“Next, find out what their process is for driving internal adoption and success. If the customer doesn’t have a process or they only focus on training and communications, they need guidance. Usually, traditional change management efforts end at go-live. They cannot sufficiently perform the ongoing user adoption activities required to accelerate time to value with your product.

“Lastly, recommend that customers set concrete user adoption goals for each week over the first three months of the system being live. Encourage end users to complete very basic system transactions by a specific date and time, such as 5 p.m. on Fridays. The following week, they should continue performing those transactions as well as adding additional, more complex transactions. By giving your customers specific system usage requirements each week and slowly layering on functionality, you build their comfort and confidence over time. This approach delivers faster value from the system and enables your customers to see clear progress and value week after week.”

- Jason Whitehead, CEO, Tri Tuns

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HOW TO AVOID OVERLOADING

the customer during onboarding

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Kristen Hayer

Founder & CEO
The Success League

Peter Watt

Implementation Team Lead
ChurnZero

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"Break a large project into smaller chunks to make it easier for a customer to wrap their head around what needs to happen next to move forward."

"If you have a hefty onboarding process, break it down into smaller steps. For example, maybe start with setting up data integrations. Next, move on to organizing the layout and then building reporting. If you break up a large project into smaller chunks, it is easier for a customer to wrap their head around what needs to happen next to move forward. Some companies we've worked with have gamified this process by awarding points or badges for achieving milestones, and that works really well too."

- Kristen Hayer, Founder & CEO, The Success League

"While you want to create a generic onboarding process that allows you to track general trends across your customer base, don't let process be your enemy and hold your customer back. Many times, especially during complex technical implementations, it may make sense for a customer to take slightly a different path in the journey.

"For example, you may have a linear onboarding process defined (Kickoff, Implementation, Training, Go Live). However, it may be the case that a customer takes longer in Implementation due to a lack of technical resources, bad data, etc. In this situation, it may make sense to push the customer into Training before Implementation is fully complete. While this seems counterintuitive, it allows the customer to see value sooner, as they are not just languishing in Implementation and sitting on a tool that they are not using."

- Peter Watt, Implementation Team Lead, ChurnZero

Irit Eizips
Chief Customer Officer
CSM Practice

Jason Whitehead
CEO
Tri Tuns

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"Nearly 30% of all customers who churn in their first year do so because of a poor onboarding experience. To avoid overwhelming customers, Customer Success teams should:

- Define value by picking a use case that will ensure end-user adoption
- Promote customer accountability during a kickoff call
- Avoid a 'big bang' approach by creating a multi-phased usage adoption plan that sets a clear path for customers to optimize value over time."

- Irit Eizips, Chief Customer Officer, CSM Practice

"Many people make the mistake of jumping right into content too quickly. Instead, we recommend the 'Go Slow to Go Fast' approach. This three-step approach focuses on reaching an agreement with the customer on how you will best work together before you jump into the content. Here's a breakdown of the three steps:

1) Build rapport. You first need to make a personal connection with your counterpart to get to know that person, understand each other's backgrounds, build trust, and get a feel for how to communicate.

2) Agree on the process. You need to agree on how you will work together and collaborate. Any customer relationship has its challenges. Many project delays are a result of distrust and conflict that arise because you did not agree to the correct collaboration process from the very beginning. Taking a few minutes to get the process straight and decide on how to communicate and collaborate will save you tons of time and unnecessary conflict later down the road.

3) Work the content. Only after you've reached a collaboration agreement are you ready to jump into the actual onboarding content. The next step is to work with the customer to understand their business goals and timeframes as well as what needs to happen to achieve those results. After gaining this information, break the work into small, manageable chunks that will not overwhelm the customer. This will keep them focused only on what they need to do next without worrying about all the other work that needs to happen over the long term."

- Jason Whitehead, CEO, Tri Tuns

HOW TO MOTIVATE

unresponsive onboarding customers

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Naomi Aiken

Customer Success Team Lead
ChurnZero

Kia Puhm

Founder & CEO
DesiredPath

CHURNZERO

“First and foremost, be kind and avoid blame. Unresponsiveness is rarely malicious.”

“First and foremost, be kind and avoid blame. Unresponsiveness is rarely malicious. Instead, seek out the cause of this delay, provide transparency about the situation from your perspective, and offer potential solutions. Help the customer understand the implications of not fully participating in the onboarding process, including what is left to accomplish and when that needs to happen. Also share the reverse situation: Customers that do onboard properly see certain results in a certain amount of time. Be upfront and clear on next steps for how this customer can be just as successful as others. And finally, don’t forget to offer help, especially if there is a barrier that you as the CSM can help lift.”

- Naomi Aiken, Customer Success Team Lead, ChurnZero

“First, validate the original desired business objectives with the customer to ensure their accuracy, priority, and commitment to achieving them. Define the full scope of their journey and specify the tasks required to achieve their desired objectives; this can even be established pre-sales. Lastly, hold the customer accountable for achieving their goals. Remind them of their outstanding and upcoming tasks at each stage along the journey so there are no surprises.”

- Kia Puhm, Founder & CEO, DesiredPath

“Companies that practice good change management are six times more likely to achieve their intended outcomes, according to Prosci.”

Ed Powers
Customer Success Consultant

Kristen Hayer
Founder & CEO
The Success League

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“This challenge almost always indicates poor change management — neither the buyer nor the seller has paid any attention the ‘people side’ of change. Companies that practice good change management are six times more likely to achieve their intended outcomes, according to Prosci. People must adopt and use the new technology to meet their business goals, and this requires a change in daily habits. People naturally resist change, so leaders must effectively manage the process before, during, and after the implementation. Prosci’s ADKAR (Awareness, Desire, Knowledge, Ability, and Reinforcement) model defines an excellent roadmap. Done effectively, customers remain engaged and energized throughout onboarding. In my opinion, salespeople and CSMs must become much more familiar with change management. Quoting change management via Professional Services (either internally or through a partner) is a simple way for a salesperson to increase the deal size and ensure they get follow-on business down the road.”

- Ed Powers, Customer Success Consultant

“If you’re actively engaging at the decision-maker level during onboarding, you have a built-in escalation point. This really helps if the project gets stalled, because you can get the buyer to push things along on their end. If you’re in a low-touch or digital environment, you should communicate to the decision-maker in an automated way. That still leaves you the option of connecting with them if things stall.”

- Kristen Hayer, Founder & CEO, The Success League

HOW TO MANAGE CUSTOMER OUTREACH

after onboarding

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"Frequently check your customers' usage, encourage the activity you'd like to see, provide resources where you see challenges, and automate wherever you can."

Megan Macaluso

VP of Customer Success & Operations

ESG Success

Ed Powers

Customer Success Consultant

"Keep it consistent. Onboarding is a planned and structured process. So, it's tempting to hand off the product to the customer and assume they can take the wheel from there, but customers often need more help to get up and running. Frequently check your customers' usage, encourage the activity you'd like to see, provide resources where you see challenges, and automate wherever you can."

- Megan Macaluso, VP of Customer Success & Operations, ESG Success

"Customer Success plans usually articulate milestones for implementation, adoption, and achievement of business goals. The CSM's job is to track each goal and milestone closely working with the champion and the executive sponsor. Once the original goals have been achieved, the CSM then transitions to focus on maximizing the value, sharing benchmarks with comparable customers to spur continued engagement. From there, the customer can determine how they want to proceed, by when, and how to best maintain contact with the CSM. Typically, both parties agree to ad hoc interaction combined with quarterly or semi-annual reviews to talk about status and evolving needs."

- Ed Powers, Customer Success Consultant

> **"By collecting customer feedback, Product and Marketing can better understand how the solution helps customers in their daily work."**

Irit Eizips

Chief Customer Officer
CSM Practice

"Once onboarding is complete, the Customer Success team will reach out to customers and the engagement level is determined per segment. Large and complex customers typically receive frequent touchpoints from their dedicated CSMs, who contact them on a weekly or monthly basis. Outreach to SMB customers is usually offered on a less frequent cadence. Personal touch is often supplemented with emails, surveys, webinars, and online communities to collect feedback or in-app messages.

"In addition to the Customer Success team's outreach, the Product and Marketing team should consider collecting customer feedback through surveys. They can also visit customers onsite to observe how customers use the solution. By collecting customer feedback, Product and Marketing can better understand how the solution helps customers in their daily work. Unfortunately, too often, Product and Marketing teams assume what features are needed from their Sales teams or based on what their competitors launch."

- Irit Eizips, Chief Customer Officer, CSM Practice

HOW TO MEASURE ONBOARDING PERFORMANCE

using the right KPIs

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Michael Sutherland

VP of Customer Experience
Groove

Ed Powers

Customer Success Consultant

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"When evaluating the success of our onboarding process, we look at four different KPIs:

1) License assignment percentage to make sure they deploy everything they've purchased
2) Active user percentage to ensure they are getting maximum value
3) Use of features by active users to know which are most highly valued and which are overlooked
4) NPS as a measurement of whether they are using the platform as laid out during kickoff"

- Michael Sutherland, VP of Customer Experience, Groove

"The onboarding KPIs that matter most include the achievement of customer's defined business outcomes, Time to First Value, and earned trust. The customer is after all paying us to achieve their goals, not to achieve ours. Quickly reaching their goals means we deployed the solution effectively and helped the customer manage change along the way. And if we've earned their trust, as measured by specific survey questions at the conclusion of the onboarding phase, then we've fully met their effective and affective needs. These three metrics have proven to be the most reliable predictors for customer retention and installed base revenue growth."

- Ed Powers, Customer Success Consultant

Irit Eizips

Chief Customer Officer
CSM Practice

Kia Puhm

Founder & CEO
DesiredPath

Megan Macaluso

VP of Customer Success & Operations
ESG Success

"Too often, companies' onboarding KPIs reflect their internal tasks and not the customers' real onboarding progress."

"Many companies monitor onboarding completion time, but what's more important to track is how quickly you deliver the first value to your customer. Ideally, customer onboarding should not be completed until your client realizes business value. Another key onboarding KPI is onboarding abandonment rate. Companies should monitor whether the customer uses their solution before officially finalizing the onboarding process."

- Irit Eizips, Chief Customer Officer, CSM Practice

"Align onboarding KPIs to the actions a customer needs to take during onboarding to discover value. Too often, companies' onboarding KPIs reflect their internal tasks and not the customers' real onboarding progress."

- Kia Puhm, Founder & CEO, DesiredPath

"Time to Value provides insights that we simply can't get anywhere else. By measuring the time between a completed purchase and the realization of value from that purchase, we can decide exactly when to engage, when to offer help, and when to nudge customers to renew or expand."

- Megan Macaluso, VP of Customer Success & Operations, ESG Success

HOW TO CRUSH ONBOARDING

with these tried-and-true best practice tips

CHURNZERO

Optimize your customer journey based on the patterns of your most successful customers.”

Kia Puhm

Founder & CEO

DesiredPath

“SaaS businesses make the common mistake of mapping the customer journey without holistically thinking of the customer and their business. Nearly every customer journey map I’ve seen is essentially an internal process map that outlines how the company *thinks* customers should use their product — not how customers truly organize themselves and adopt the product to reach their desired outcome.

“I made the same mistake while leading Customer Experience at Eloqua and Oracle. We built an entire model predicated on the wrong perspective of the customer journey. From those learnings, I can summarize my 25-year career in software into two aha moments:

1. Aligning your internal organization around the customer’s point of view is the best way to position your team to deliver a superior customer experience.
2. Optimizing your customer journey based on the patterns of your most successful customers is the most effective way to drive growth in a proactive, repeatable, and scalable manner.

Create a customer-centric business model — like DesiredPath’s Intelligent Framework™ — that is holistic, adaptable, and results-focused to accelerate your customers’ value and your revenue growth.”

- Kia Puhm, Founder & CEO, DesiredPath

Kristen Hayer

Founder & CEO
The Success League

Jason Whitehead

CEO
Tri Tuns

CHURNZERO

"Starting your kickoff meeting with the 'why' behind the project helps everyone involved in onboarding understand its importance."

"Have the decision-maker and the salesperson attend the kickoff meeting. They should start the meeting by describing what was purchased and why, and the business value that this project is expected to produce. They don't have to stay for the entire meeting. Starting your kickoff meeting with the 'why' behind the project helps everyone involved in onboarding understand its importance. This tends to keep projects on track and prevents them from stalling. I see a lot of companies jump right into a technology discussion on their kickoff calls, and I think it's a mistake to assume that everyone on the customer side knows what's going on and why."

- Kristen Hayer, Founder & CEO, The Success League

"One of the best things you can do when onboarding new customers is to shift their focus from short-term, technology issues to what success looks like in terms of business outcomes three, five, and 10 years down the road. Many customers fixate on go-live dates and the initial deployment of systems without considering long-term value creation. Shifting their focus to a long-term view helps customers understand and identify the myriad change management and user adoption work they need to perform, yet typically skip. Once the customer identifies their long-term business goals, work backwards to create a realistic plan and internal user adoption/ success program. Get the customer focused on their desired outcomes from the very beginning to ensure they see success and renew with you year after year."

- Jason Whitehead, CEO, Tri Tuns

Michael Sutherland

VP of Customer Experience
Groove

Megan Macaluso

VP of Customer Success & Operations
ESG Success

CHURNZERO

"When you have a bunch of different roles and different teams, training everyone in one webinar is not the best approach."

"When you have a bunch of different roles and different teams, training everyone in one webinar is not the best approach. Instead, we rely on role-based training that incorporates many different interactive elements to keep people engaged. QBRs are an integral part of many Customer Success teams, but at Groove, they haven't really worked because every LOB user and team uses us so differently. While we don't have formal QBRs with all stakeholders, we do conduct similar meetings with specific individuals who can report on how our platform is performing against internal KPIs."

- Michael Sutherland, VP of Customer Experience, Groove

"There are three fundamental questions we always ask before beginning the onboarding process:

1. Why did the client purchase the software and what was the process?
2. How complex is the implementation?
3. What are the points during the implementation when you can provide value, possibly even before they're 100% onboarded?"

- Megan Macaluso, VP of Customer Success & Operations, ESG Success

ABOUT Our Experts

Bri Adams
Customer Success Team Lead, ChurnZero
Bri manages the Key Accounts team, where she helps support and build processes around this strategic set of customers. Bri comes to Customer Success with a background in Software Implementation, Customer Support, and Account Management across a variety of SaaS platforms. Bri moved to the DMV area from Houston, Texas in 2018, is a voracious reader, and spends as much free time as possible in the museums and public parks in DC.

Naomi Aiken
Customer Success Team Lead, ChurnZero
Naomi Aiken is the Team Lead for Customer Success at ChurnZero. She joined ChurnZero in 2018 after more than a decade in SaaS software in the higher education space. Naomi enjoys doing arts and crafts projects with her two young children, reading biographies and memoirs, and seeking out the best bakeries in her area.

Mikael Blaisdell
Executive Director, The Customer Success Association
Mikael Blaisdell is the founder and executive director of the Customer Success Association. He's a recognized leading voice on the strategy, process, people, and technology of customer retention and increased per-customer profitability. His ongoing research and leadership of the over 33,000-member worldwide Customer Success Community on LinkedIn provides a unique global view of the development of the Customer Success profession and market.

Irit Eizips
Chief Customer Officer, CSM Practice
Irit brings deep expertise in the area of Customer Success. She partners with Customer Success leaders to accelerate the creation of Customer Success strategies, derive extensive value from Customer Success solutions, and coach the CSM team in becoming more proactive and efficient.

Kristen Hayer
Founder & CEO, The Success League
Kristen believes that Customer Success is the key to driving revenue, client retention, and exceptional customer experiences. Her areas of expertise include developing success goals and metrics, designing the optimal customer journey, selecting technology, training teams, and building playbooks. Over the past 20 years she has been a success, sales, and marketing executive, primarily working with growth-stage tech companies.

Bora Lee
Customer Success Operations Team Lead, ChurnZero
Bora is passionate about helping her customers succeed by crafting big-picture strategies executed through automated, streamlined processes that put the right data in front of her customer at exactly the right time. She is responsible for implementing strategic initiatives and projects that deliver clear insights and increase the effectiveness of internal and external processes, systems, and business decisions.

Kia Puhm
Founder & CEO, DesiredPath
An expert in Customer Success, Kia has 25 years' experience helping companies accelerate revenue growth. Prior to founding DesiredPath, Kia held chief positions at Oracle, Eloqua, and Day Software (Adobe). Learn more at www.desiredpath.com.

Ed Powers

Customer Success Consultant
Ed Powers is a Customer Success practitioner and consultant with over 30 years' experience working with customers in many different industries. He specializes in performance breakthroughs by applying the latest advances in neuroscience, enterprise data analytics, and continuous improvement.

Cece Renick
Account Manager, Chili Piper
Cece's diverse background combines all the best aspects of Customer Success, Sales, and Hospitality. Cece is a founding member of the Account Management team at Chili Piper, a SaaS company that helps modern revenue teams automate their scheduling and convert leads into meetings, instantly.

Mike Sutherland
VP of Customer Experience, Groove
Mike has more than 15 years of experience at disruptive B2B SaaS software companies, including Sales and Customer Success leadership roles at Google and Prezi. Under Mike's leadership, Groove's sales engagement platform has earned a number one customer service ranking from G2 for two years running.

Megan Macaluso
VP of Customer Success & Operations, ESG Success
Megan is the VP of Customer Success & Operations at ESG which delivers Customer Success as a Service. They help clients efficiently extend their customer coverage model, refine their digital communication, and improve Customer Success maturity – leading to happier customers and a stronger organization.

Peter Watt
Implementation Team Lead, ChurnZero
Peter Watt is Team Lead for Implementation at ChurnZero. He has a background in Customer Success and Sales Engineering, perfectly combining his love of understanding technical requirements and translating them to an easily digestible format.

Jason Whitehead
CEO, Tri Tuns
Jason is CEO of Tri Tuns, LLC and Co-Founder of Customer Success Mastermind. Jason works to bridge the gap between buyers and sellers of SaaS software to help accelerate user adoption and value creation so both organizations are successful. He is also frequent blogger and cohost of the popular Customer Success podcast series, "The Jasons Take On ..." that advocates for taking bold action to drive customer success.