



The Great Customer Success Debate





A Note From the Editor

No one is debating whether or not Account Executives should carry quotas.

No one is debating whether or not Customer Support Managers should be measuring ticket resolution time.

No one is debating whether or not it's appropriate to cry at the end of Titanic.

There are many things in life that are no longer up for debate. Customer Success, however, is not one of them.

Customer Success is a nascent industry when compared to Product, Sales, Support, etc., and while there are many things that the industry agrees on, there are still many things that are up for debate.

By and large, Customer Success professionals are quite agreeable people. They're natural relationship-builders, they're empathetic, and they're able to look at situations from a multitude of perspectives.

That's why we knew if we were going to create a resource that would truly be unique and impactful for the Customer Success industry, we were going to have to identify and zero in on the few topics that Customer Success professionals disagree most strongly on. Echoing the same sentiments already shared by all Customer Success professionals does not lead to real progress. It is only through disagreement that we can have meaningful conversations and move our industry forward.

Our goal with this ebook is to share with you what we have identified as the most controversial topics in Customer Success, as well as the arguments supporting both sides of the debate. We partnered with [SuccessCOACHING](#) to survey their list of the Top 100 CS Strategists and Top 25 CS Influencers, which is a diverse list of CS leaders from around the globe, known for their experience in and contributions to the CS industry. They were remarkably divided concerning almost all of the topics we asked them to weigh in on, and we are excited to be sharing their answers with you below.

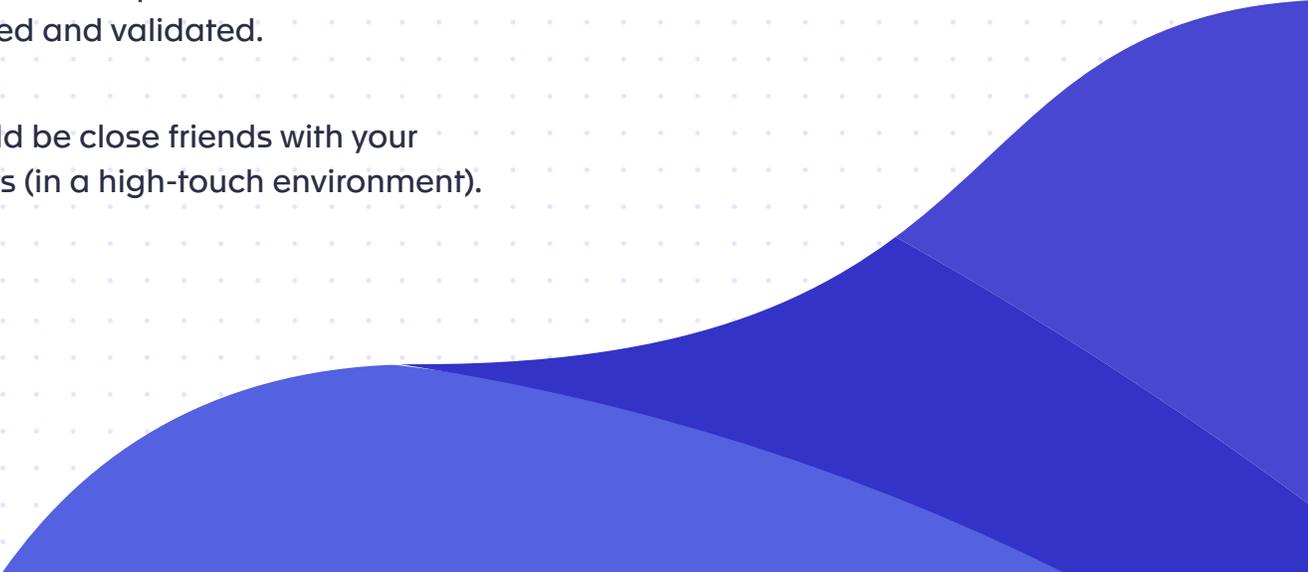


Ben Winn,

Community Manager, [Catalyst Software](#)

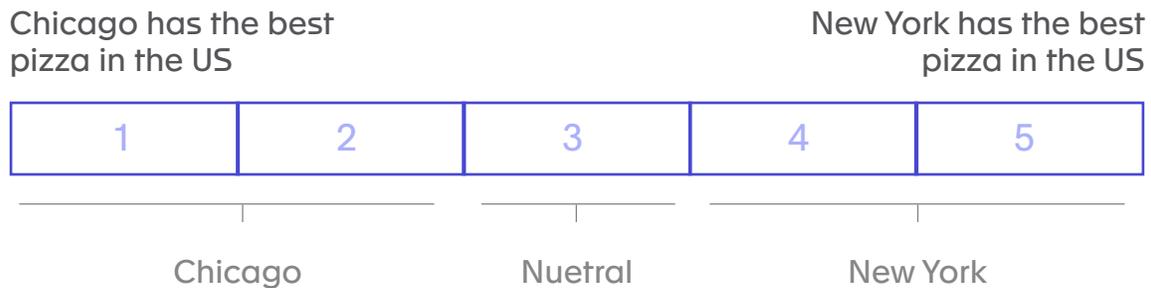
Top Takeaways From This Research

These takeaways represent the majority of responses, however as you will see throughout this book, many of these topics of debate were won/lost by an extremely narrow margin, and many responders indicated that their answer could vary depending on the situation.

1. Core CS skills matter more than subject matter expertise.
 2. Sales or Account Management should own renewals with the support of CSMs.
 3. CSMs should be the primary point of contact vs. customers having multiple touchpoints.
 4. Customers should be the primary influencer of the product roadmap.
 5. CS software should only be deployed after systems and processes are established and validated.
 6. You should be close friends with your customers (in a high-touch environment).
 7. Customer health scores should be weighted and include a wide variety of factors.
 8. CSM sentiment should account for more than 25% of the customer health score.
 9. Shared Slack channels are a very effective way for CSMs to communicate with and support their customers.
 10. NPS should be a very insignificant component of a customer health score.
- 

About The Survey

The questions were phrased to respondents in such a way that forced them to choose either A, B, or N/A for topics that are very nuanced.



We ask you to recognize that these respondent have complex and varying views, and it is simply for the purposes of this ebook that we have synthesized their responses into a straightforward and easily digestible format.

When reading the survey, answers are displayed in the following format:



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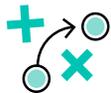
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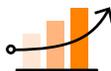
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TOPIC 1

Subject Matter Expertise



Subject Matter Expertise

QUESTION

What matters more: Core CS skills, like communication and empathy? Or subject matter expertise, like a fintech startup hiring those with previous experience in the financial sector?

Subject matter expertise is what matters most.

Core CS Skills are what matter most.



Core CS skills are what matter most.

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Arguments for: Subject matter expertise is what matters most.

Being a subject matter expert allows you to have more empathy for the customer.

Speaking the language of the customer’s business allows you to earn their trust.

Basic CS skills can be taught much easier than subject matter expertise.

Arguments for: Core CS skills are what matter most.

If a CSM doesn’t have core CS skills, it will put your business at risk.

Core CS skills allow for much more flexibility and adaptability.

Core CS skills are much harder to teach than subject matter expertise.

ARGUMENTS FOR

Subject Matter Expertise is What Matters Most.

“Subject matter expertise will help with being empathic towards the customer. Someone who has experience in the industry has probably lived through situations your customers will experience. CS skills can be taught in the end. The experience of living the day-to-day life of your industry is much harder to teach.”

André Scaff

Product Manager, Loadsmart

“You will never achieve the status of Trusted Advisor unless/until you can demonstrate in-depth knowledge of your client’s business. You have to speak the language of their business fluently.”

Mikael Blaisdell

Executive Director, The Customer Success Association

“Being a subject matter expert is more important than CS skills because knowing the product through and through is how value is ultimately delivered. The bonus is having amazing CS skills to drive the conversations that lead to value realization.”

Ronni Gaun

Enterprise Customer Success Manager, Zoom

“Basic CS skills, metrics, techniques, methodology, are taught and learned.

But a job done by an expert on the subject being discussed, for me, is the ideal scenario. If I am getting help with advocacy software, I would love to be served by someone who knows what a lawyer does, not just what the software does.”

Roberta Silva

Fundadora e co-fundadora especialista, Consultoria de Sucesso / Cliente Cast

“We have tried both approaches with our customers and found adoption best if the CSM has a core background of our product (though it should be noted we are a high-touch, complex solution).”

Chad Jasmin

VP of Sales and Customer Experience, Wi-Tronix

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ARGUMENTS FOR

Core CS Skills Are What Matter Most

“A CSM who has a strong foundation of core skills will be able to start and ramp up quickly which gives you the time to teach them industry knowledge. There are some industries where having a background in the vertical your customers are in will help, but that knowledge can also be studied and learned over time. If a CSM lacks core skills, they will not be able to properly manage customers and this puts your business at-risk.”

Jeffrey Nadeau

VP Customer Success, Wibbitz

“Core Customer Success skills, including but not limited to: empathy, critical thinking, problem solving, strategizing, etc., are hard to teach someone, if not impossible. How do you teach someone to have empathy? As a leader, those are things I look for in people; I want to see how you think. Subject matter can be taught, and as leaders, that’s where coaching and developing plays an important role.”

Shari Srebnick

Head of Customer Success, Searchmetrics

“I’ve seen some professionals with experience in a particular subject matter who were not able to guide other companies on how to execute on what they were used to doing before. I believe CS Skills give more flexibility and adaptability for professionals to develop hard skills. They also allow CS professionals to be consultative with their customers regardless of the niche they are working in.”

Mariana Assis

*LATAM Strategic Accounts, Management,
Workplace from Facebook*

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“Subject matter expertise can be attained by training if you have the right tech or related background. Core CS skills are harder to learn quickly and a lot of good CS comes from mindset, which is built based on experience.”

Chitra Madhwacharyula

Former Vice President, Joveo

“Core CS soft skills are harder to acquire than relevant knowledge of the space. Normally CS can make up for lack of knowledge by taking questions offline.”

Or Guz

Director of Customer Success, PerimeterX

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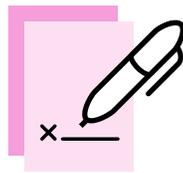
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SUBJECT MATTER EXPERTISE

General Consensus

There are clear benefits to having subject matter expertise and core CS skills, however the data gathered shows the majority of leaders believe that core CS skills are more important. At the end of the day, companies have unique needs and while some highly complex or technical companies may prefer CSMs with more subject expertise, other companies may prefer CSMs with more core CS skills.



TOPIC 2

Renewal Ownership



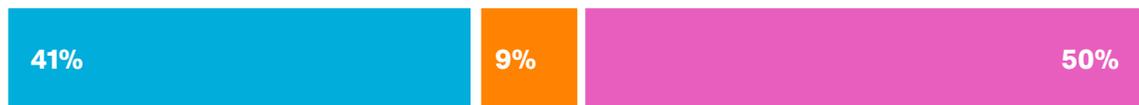
Renewal Ownership

QUESTION

Who owns renewals: Customer Success Managers or Sales/ Account Management supported by CSMs?

Renewals should be 100% owned by CSMs

Renewals should be owned by Sales or Account Management, supported by CSMs



Renewals should be owned by Sales or Account Management, supported by CSMs.

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Arguments for: Renewals should be 100% owned by CSMs.

Too many cooks in the kitchen.

Renewals shouldn't be a negotiation - they should be a natural continuation of the customer journey.

The CSM has the trust of the client and is therefore best positioned to negotiate the renewal.

Arguments for: Renewals should be owned by Sales or Account Management, supported by CSMs.

It's important to separate church and state (sales and CS motions).

Driving value and driving commercial terms require two different skill sets.

Renewals are transactional without value-add, and therefore don't align with the core function of a CS team.

ARGUMENTS FOR

Renewals should be 100% owned by CSMs.

"Renewals should be 100% owned by CSMs, otherwise there will be too many cooks in the kitchen. Having numerous people responsible for different commercial aspects of a client relationship is unmanageable and creates different threads of communication, thereby permitting miscommunication to happen between the client and your company."

Alex Kaufman

Senior Customer Success Manager, Signal AI

“Renewals shouldn’t need to be a sales negotiation. Done right, they should be the natural continuation of the journey towards building long-term business value as part of the ongoing CS/Customer relationship.”

Jon Triggs

Head of Customer Success, Fluent Technology

“A CSM builds the trust of their client by working with them to achieve their outcomes over the course of their lifecycle, which positions them as the best person to negotiate the renewal.”

Natalie Fedie

Vice President of Customer Value, HighRadius

“The renewal outcome (GRR) should absolutely be owned by CS. While the CSM may rely on partners within the CS organization for actual negotiation / processing (Renewals Managers), the CS org should be responsible for renewal metrics and outcomes.”

Brian LaFaille

Director, Customer Success Programs, Google

“CS knows far more about what’s happening in the account and gets blamed for non-renewals, so logically CS should also have ownership over renewals and get the credit.”

Vijay Mehrotra

Professor, Business Analytics, University of San Francisco

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ARGUMENTS FOR

Renewals should be owned by Sales or Account Management, supported by CSMs.

“Delivering brilliant strategy and upsetting a client can go hand-in-hand, but I never want any of our customers to assume that our strategy is selfishly motivated. Having a separation of church and state between Success and Sales ensures that our strategy truly is for the good of our clients.”

Scott Dzialo

Customer Success Director, Enterprise + Strategic Accounts, Braze

“Driving value and driving the commercial terms of a customer relationship requires two different skill sets. I group people into two large buckets - Built To Serve and Built To Sell.”

Nils Vinje

Founder and CEO, Glide Consulting

“Renewals are transactional. There is no value-add in the renewal motion and therefore it doesn’t align with the overall purpose of having a CS team. To add, depending on the size of the customer, the renewal process can be extremely drawn out and require a lot of follow-ups. Again, this takes time and resources away from the core function of CS.”

Diana De Jesus

Customer Success Manager, Catalyst

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“Renewals and Expansion should be owned by the team who is qualified to have the conversation. Often CSMs are asked to own renewals without any proper training. That is a disservice to the client, your team, and your company.”

Emilia D’Anzica

Founder & CEO, Growth Molecules

“Customer Success Managers must not be commercial. They shouldn’t even be measured by direct revenue / book of business. The core of customer success is built on value and relationships.”

Ziv Peled

Chief Customer Officer, AppsFlyer

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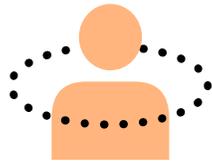
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RENEWAL OWNERSHIP

General Consensus

The data shows that leaders believe that renewals should be owned by Sales or Account Management, supported by CSMs. Some believe that having the CSM also manage the renewal impedes their relationship with the customer, while others believe it is because of their relationship with the customer that they should be managing the renewal. In an ideal world, many respondents pointed out that renewals are not even a negotiation, however as we are not in an ideal world, this might not be feasible for many companies.



TOPIC 3

Points of Contact



Points of Contact

QUESTION

Should customers have multiple points of contact at a company? Or should everything be going through the CSM?

CSMs should be the primary point of contact for their customers and all communication to/from the customer should go through them.

Customers should have multiple points of contact at a company, and others at the company should be communicating directly with customers.



CSMs should be the primary point of contact for their customers and all communication to/from the customer should go through them.

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Arguments for: CSMs should be the primary point of contact for their customers and all communication to/from the customer should go through them.

Have a single, unified voice.

Reduce customer confusion and frustration.

Ensure for both the company and the customer that both sides are making the best use of everyone’s time.

Arguments for: Customers should have multiple points of contact at a company, and others at the company should be communicating directly with customers.

A single contact creates a bottleneck.

Customers should have the most direct path possible to accomplishing their goals.

All departments should have their chance to shine, and the CSM should be there to help the customer navigate internal stakeholders.

ARGUMENTS FOR

CSMs should be the primary point of contact for their customers and all communication to/from the customer should go through them.

“It’s very important to the customer to have one single voice. Sometimes due to the complexity of the engagement, the approach of having the CSM lead strategic conversations does not work though. In these cases, it’s very important to have proper internal alignment so that everyone sings the same song.”

Leandro Demari

WW Practice Leader Manager, HP Inc

“To lessen the confusion for the customer, it is my philosophy that they should try to filter all communication through one point of contact. The more contacts there are, the higher the likelihood of introducing confusion or frustration to the customer.”

Brian Hartley

Senior Director of Customer Success, RFP360

“CSMs should be the bi-directional channel to-and-from the customers to ensure the best utilization of time and resources (on both sides).”

Boaz Arbel

VP Operations and Support, Logz.io

“If everyone owns the customer, no one owns the customer.”

Bill Cushard

General Manager, ServiceRocket

“100% CSM. Multiple points of contact will definitely create a mess of the relationship.”

Michael Zaitsev

Head Of Customer Success, Appsflyer

ARGUMENTS FOR

Customers should have multiple points of contact at a company, and others at the company should be communicating directly with customers.

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“Establishing the appropriate channels for customers to have the most direct path to accomplish their goal can provide a better customer experience than having a single point of contact. A single point of contact could also become an anchor/bottleneck.”

Ellie Wu

Senior Director, Customer Experience Transformation, SAP Concur

“A bottleneck can and will leave your customer feeling stuck and depending on how deep you want the relationship, a single point of contact limits the potential for expansion.”

Ari Hoffman

Director of Customer Advocacy, Coveo

“A CSM should be there to help a customer navigate the various internal stakeholders instead of acting as the wizard of all answers. Billing should have their chance to shine. Tech support should have their chance to shine. Then, the CSM can be leveraged to escalate cases as they see fit.”

Kevin Leonor

Customer Success Manager, RingCentral

“Here at SenseData we have Success Squads managing clusters of customers, with a multidisciplinary team made up of: CSs, ISs, CXs, PSs and Devs. Everyone is focused on customer success and can contribute individually or by collaborating within the Team.”

Guilherme Pellegrino

CCO, Sensedata

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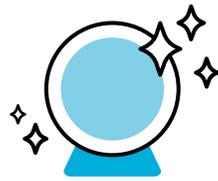
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POINTS OF CONTACT

General Consensus

There is an undeniable benefit to having one point of contact for the customer, however this does inevitably create a bottleneck. While there was a slight preference for the multiple touchpoints argument, it was nearly split 50/50.

Most respondents seemed to agree that as companies and CS teams become larger, multiple points of contact are inevitable, though the CSM should always be in the loop.



TOPIC 3

Product Roadmap



Product Roadmap

QUESTION

How much impact, if any, should customer feedback have on the product roadmap?

Customer feedback should be the primary driver of the product roadmap. Customers know best what they want and need.

A mix of company vision and market intelligence should be the primary drivers of the product roadmap. Customers don't necessarily know what they want/need until you show it to them.



A mix of company vision and market intelligence should be the primary drivers of the product roadmap. Customers don't necessarily know what they want/need until you show it to them.

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Arguments for: Customer feedback should be the primary driver of the product roadmap. Customers know best what they want and need.

Arguments for: A mix of company vision and market intelligence should be the primary drivers of the product roadmap. Customers don't necessarily know what they want/need until you show it to them.

Addressing customer problems and requests leads to higher adoption.

Customers know what they want but might not know what they need.

Products are built to solve a problem/fill a customer's need, so customer needs should continue to drive the roadmap.

Customers sometimes ask for things they think they want but don't end up using them.

Innovation comes from information, so the roadmap should be driven by current and prospective customers.

Customers often ask for things that are unique to them, so market research must be leveraged.

ARGUMENTS FOR

Customer feedback should be the primary driver of the product roadmap. Customers know best what they want and need.

"Customers want to be heard and addressing their problems will in turn drive higher levels of adoption"

Nick Chang

VP and Global Head, Customer Success, HPE

“When an organization creates a product or service, we can presume that it is because there is a consumer base that has acknowledged a need, so why shouldn’t an organization consider their customer as they build out their product or service?”

Erica Swint-Williams

Senior Manager, Customer Success, Mailchimp

“Innovation comes from information. Even autonomous vehicles came from interviewing folks stuck in traffic. The product roadmap should always be driven by your existing customers or prospective customers.”

Edward Chiu

CEO, Catalyst

“Customer feedback should be the primary driver of the product and roadmap as they are the ones using it.”

Krista Roberts

Customer Success Manager, Enterprise, IntelliShift

“I’m sure customers know exactly where their biggest pains, their biggest challenges are. What we need to ensure is that this is the focus when we put VOC on the roadmap, understand the pain / need and not immediately adopt the solution that the customer suggested. Teamwork: the customer knows the pain and the product team has to give the best medicine!”

Luciana Teles

Head of Customer Success and Customer Care, Axur

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Customer feedback should inform directly the marketing, sales, and product teams. The most important data points are those coming directly from customers. The process of collecting, prioritizing, and activating that feedback is critical to putting that feedback into action.

Megan Macaluso

VP, CS & Operations, ESG (Customer Success as a Service)

“In order to develop a good relationship with the customers and foster customer loyalty, a feedback loop is needed. The customer must have ways of expressing their opinions about the company’s product, strategy, quality, support and service. Even when the customer does not have specific feedback about anything on their journey, they will still have a perception about your brand and company, hence, they need to feel comfortable about sharing it. Customer feedback is extremely important for the business strategy, and although many customers are not sure about what they want, they will always have data that could be leveraged to capture their real perceptions. For instance, using the customer’s previous behaviors, it is possible to forecast their next steps. Thus, you could capitalize on information and offer services that will help this customer to be successful.”

Sharon Zanandrais

Head of Customer Success, AMCHAM Brasil

ARGUMENTS FOR

A mix of company vision and market intelligence should be the primary drivers of the product roadmap. Customers don’t necessarily know what they want/need until you show it to them.

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“Customers know what they want, but they don’t always know what they need. Product managers should understand the nature of the data customers provide and use it in proper context.”

Ed Powers

Consultant, Service Excellence Partners

“Customers sometimes think they want something then you put it in and they don’t use it. It should be a combination of customer needs and internal vetting.”

Kim Oslob

Sr. Director Customer Engagement, MeasuringU

“I lean to understanding the market and doing research. In general (big caveat) customers will be asking for things that are unique to their situation. So the research must be done to see if that is also market-driven and can benefit more than just one.”

Jeff Breunsbach

Director of CX, Higher Logic

“It’s hard to be true innovators when you don’t use vision. Customers can be more focused on enhancements to what they already have.”

Donna Weber

President, Springboard Solutions

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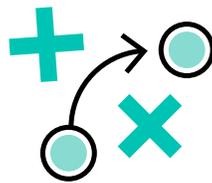
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PRODUCT ROADMAP

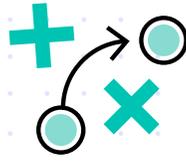
General Consensus

In general, most respondents do agree that the product roadmap should not be driven *exclusively* by customer feedback. The debate is more around “to what degree should customer feedback be incorporated” and unfortunately the answers were too widely-ranging to have a conclusive answer to that. Whether or not customers can be trusted to know what they want and need (two different things!) is still up for debate.



TOPIC 5

Software Implementation



Software Implementation

QUESTION

When is the right time to deploy CS software?

Employing CS software is an excellent catalyst for establishing processes, structures, and systems for CS teams.

CS software should not be employed until a CS team has established and validated processes, structures, and systems.



CS software should not be employed until a CS team has established and validated processes, structures, and systems.

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Arguments for: Employing CS software is an excellent catalyst for establishing processes, structures, and systems for CS teams.

CS software companies are experts in their field and can offer advice regarding structure, best practices, automation, etc.

CS software allows you to be proactive instead of reactive.

Adding in software early on allows CS orgs to scale faster and more efficiently.

Arguments for: CS software should not be employed until a CS team has established and validated processes, structures, and systems.

Technology should operationalize and scale efforts, not determine them.

CS software isn't useful until you've implemented and tested your current processes.

Garbage in, garbage out. Software implemented prematurely doesn't yield desired outcomes.

ARGUMENTS FOR

Employing CS software is an excellent catalyst for establishing processes, structures, and systems for CS teams.

"A strong customer success platform helps guide you into the right processes. Customer success platform teams are experts in customer success, so you may as well leverage that and build your processes on the baseline of what is already known to work."

Amanda Ingraham

Director of Customer Success, 15Five

“Having a Client Success (CS) application is foundational for any CS program--without one you might as well prepare yourself and your CS organization for managing clients reactively. A CS application houses the data that tells the story and allows a CS organization to be proactive in ways you didn’t realize were possible. Not having a CS application to manage a client-base is like reading a book without words.”

Paul Case

Vice President of Client Success, Tyler Technologies

“Setting the foundation of processes and systems around a well-defined customer journey as early as possible will help set the organization up for greater scale sooner and allow increased visibility by functions outside of CS so that x-functional accountability related to customer outcomes is possible.”

Mary Poppen

Chief Customer Officer, Glint at LinkedIn

ARGUMENTS FOR

CS software should not be employed until a CS team has established and validated processes, structures, and systems.

“Having successfully deployed CS software at 4 companies, I can say that the most successful implementations have been when there was a CS process and infrastructure in place. I believe that

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technology should be there to operationalize and scale your efforts NOT determine them.”

Kristi Faltorusso

VP of Customer Success, IntelliShift

“You can buy a CS system at any point but you won’t take advantage of it fully unless you have some core processes worked out. CS platforms should help you in your scaling efforts when you’ve maxed out what you can do with your CRM and spreadsheets.”

Chad Horenfeldt

Director, CS, Kustomer

“Software should be leveraged to improve customer success, it doesn’t know what successful customers need. Garbage in, garbage out. A company needs to understand its customers and how to best support them first, then it can best figure out how to leverage software to drive desired outcomes.”

Kia Puhm

Founder & CEO, DesiredPath

“Systems are for scale. We can use the system to scale the solution or scale the problem.”

Guilherme Tavares

VP CS and CMO, Toccato - QLIK

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“Getting the software first is putting the cart before the horse. At that stage the organization does not know its requirements and as such will be too easily molded by the features and functions and “good ideas” inherent within the software so that they end up with a Success Organization run BY the software, rather than the other way around. Additionally much time and effort can be lost setting up and implementing software that then fails to deliver value.”

Rick Adams

CEO and Founder, PracticalCSM.com, PracticalCSM.com

“This is a chicken-and-egg situation, but without some basic processes and understanding, a software solution alone cannot resolve many issues.”

Rebecca Nerad

Vice President, Customer Success, E2open

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SOFTWARE IMPLEMENTATION

General Consensus

In general, the vast majority of respondents agreed that it's better to have structure and systems in place before implementing Customer Success software to make sure it is truly effective in scaling your CS org.



TOPIC 6

Customer Friendships



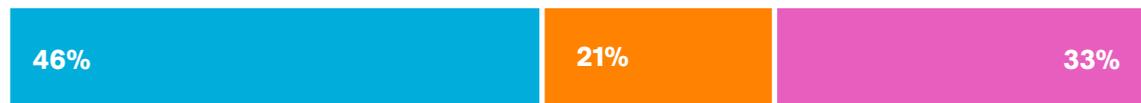
Customer Friendships

QUESTION

Should CSMs be friends with their customers?

You should be close friends with your customers.

Your customer relationships should be strictly professional.



You should be close friends with your customers.

Debate Summary

Arguments for: You should be close friends with your customers.

A deeper relationship leads to deeper understanding which leads to better outcomes.

People prefer to do business with people they like.

Friendships can give you a competitive advantage.

Arguments for: Your customer relationships should be strictly professional.

Friendships can lead to a conflict of interest.

CS software isn't useful until you've implemented and tested your current processes.

The customer should be connected with the company and brand, not the individual.

ARGUMENTS FOR

You should be close friends with your customers.

"Providing a brilliant customer experience means understanding the totality of your customers' points of view and molding your strategies to meet their needs. You can best achieve this if you have a deeper relationship with your customer."

Scott Dzialo

Customer Success Director, Enterprise + Strategic Accounts, Braze

"It's important to have a professional relationship while maintaining a personal connection. At the end of the day, people prefer to do business with people they like."

Jeffrey Nadeau

VP of Customer Success, Wibbitz

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“Friendships are much stronger than business relationships and they can give you a competitive advantage. It’s also just a better, more positive experience overall for everyone involved.”

Ben Winn

Community Manager, Catalyst

“Great relationships can go beyond just business but don’t have to be very personal. There’s value in a CSM knowing about their customers’ family situation, challenges and more. This enables empathy and compassion.”

David Ellin

Chief Customer Officer, Centric Leadership Strategies

ARGUMENTS FOR

Your customer relationships should be strictly professional.

“You can’t scale if you try to be friends with customers.”

Peter Armaly

Senior Director, Customer Success Enablement, Oracle

“Closer relationships with customers can be a consequence of a higher touch, however, the customer needs to be primarily connected with the company, the brand and the solution.”

Vinicius Bento

Head of Customer Success, Rede Vitorias

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“The mission of Customer Success is to increase sustainable proven profitability for both customers and company. The role of a professional is to get the job done. Trying to maintain a personal friendship with an individual at a customer site opens the door to a potential conflict of interest between what is best for the customer and best for the individual friend.”

Mikael Blaisdell

Executive Director, The Customer Success Association

“Customer relationships should focus on being professional, however, I do think that a personal relationship of some level is extremely important, but is highly dependent upon the customer (and the CSM). Relationships are critical to success and can be the biggest differentiator or reason a customer chooses or stays with their vendor. It’s helpful to get to know one another personally in some way and build additional layers of trust - but you always have to maintain that level of professionalism to make sure lines don’t get crossed.”

Max Powers

Principle, Max Powers Consulting

“Don’t make them friends because business demands it. That’s not how friendship works :) That’s not how business works either! When customers get the results they came to you for, the friendship can be a happy by-product.”

Nimesh Mathur

Head of Customer Success (APAC), Branch Metrics

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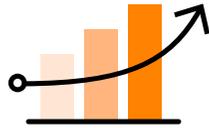
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CUSTOMER FRIENDSHIPS

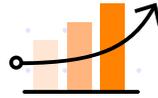
General Consensus

In general, most respondents agree that friendships are a very positive thing and yield numerous benefits for both the customer and the company, however as many respondents pointed out, friendship should not be the primary goal - it occurs as a side effect of the amount of time spent together and the achievement of positive outcomes.



TOPIC 7

Health Scoring



Health Scoring

QUESTION

Should health scores be simplistic or complex?

Customer health scores should be weighted and include a wide variety of factors (adoption, time-to-value, business outcomes, bugs, sentiment, lifecycle, etc.)

Customer health scores should be simplistic and focus solely on business outcomes to avoid any vanity metrics impacting the score.

66%

9%

25%



Customer health scores should be weighted and include a wide variety of factors (adoption, time-to-value, business outcomes, bugs, sentiment, lifecycle, etc.).

Debate Summary

Arguments for: Customer health scores should be weighted and include a wide variety of factors (adoption, time-to-value, business outcomes, bugs, sentiment, lifecycle, etc.)

Churn can happen for any number of reasons, so you should be tracking as many metrics as possible.

Customer health is complex and requires considerable data to begin to understand. Even then a health score can fail.

Ignoring metrics that are likely to be correlated with churn prediction makes a health score redundant.

Arguments for: Customer health scores should be simplistic and focus solely on business outcomes to avoid any vanity metrics impacting the score.

Health scores are unreliable and are known to be faulty, so the focus should be on simplifying and stepping back, not diving further in.

Simplicity leads to action.

Too many metrics leads to complex, flawed results, which causes people to stop using the health score altogether.

ARGUMENTS FOR

Customer health scores should be weighted and include a wide variety of factors (adoption, time-to-value, business outcomes, bugs, sentiment, lifecycle, etc.).

“I believe that health scores should indicate churn or expansion patterns. That said, we know that specially churn could happen for a multitude of reasons, so in order to determine that pattern,

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it is necessary to map the main customer KPIs, such as: business outcomes, adoption, engagement, sentiment, support, etc..”

Lilian Franco

Head of Customer Success & Care, Wirecard Brazil

“If you want a view of your customer health, you’ll need multiple data points, including the time to value, bugs, adoption, sentiment scores, and a manual relationship stat set by the CSM. While health scores are nice as an overall barometer, they are not the end-all for the portfolio. I use them to gauge the overall portfolio health at a snapshot and trendline. I have historically had customers with fantastic health churn and those with poor health renew. Treat health scores as another data point in the bigger picture.”

Maranda Dziekonsk

Vice President Customer Success & People Ops, Swiftly

“The Customer Journey Road to Success is narrow and fraught with renewal risks. A simplistic health score which doesn’t consider the customer journey stage, milestone progress and other risks will not have any correlation with the customer propensity to renewal. ”

Andreas Knoefel

Founder, CStuners

“Health scores should be comprehensive but easily explainable by the CSM. They shouldn’t have more than 3-5 components.”

David Sakamoto

Vice President of Customer Success, GitLab

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“The Customer Health Score should be a metric for taking action, so it should count the indicators that make sense to predict churn and opportunities for improvement. Each company needs to find its indicators, those that make sense for their business and that have already been validated (that is, that were found in customers who canceled or expanded with the company in the last few months). I only suggest running away - whenever possible - from the ready-made KPIS that everyone uses: look at your business and see what makes sense to your client.”

Luciana Teles

Head of Customer Success and Customer Care, Axur

ARGUMENTS FOR

Customer health scores should be simplistic and focus solely on business outcomes to avoid any vanity metrics impacting the score.

“We’re becoming too dependent on health scores. They are becoming overused and over-complicated.”

Jeff Breunsbach

Director of CX, Higher Logic

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“Keep it simple so your team can understand why customers may be unhealthy so they can act. Over instrumenting can lead to confusion and, even worse, ignoring customer health signs all together

Chris Brown

Director of Customer Success, Fulcrum

“Customer health scores exist so that a CSM can take action before it’s too late. Keeping the customer health score simple keeps it actionable. Figure out the 1-2 reasons why the score is low and then take action.

As soon as you pack that health score with lots of attributes, logic, and complexity, you’ll find a million reasons why that score isn’t accurate and people will stop using it.

The customer health score shouldn’t be the be-all, end-all of whether or not a customer is going to churn. It’s simply an indicator that informs a CSM to inspect and apply their judgement.”

Junan Pang

Senior Manager, Customer Success, Slack

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HEALTH SCORING

General Consensus

In general, most respondents feel that health scores should incorporate a wide variety of factors that are correlated with predicting key outcomes. Respondents also echoed the similar sentiment that while these factors should all be included, the health score in general should not be the be-all-end-all - just one more tool in the CS team's toolkit.



TOPIC 8

CSM Sentiment



CSM Sentiment

QUESTION

How much impact should CSM sentiment have on the customer health score?

CSM sentiment should account for more than 25% of the customer health score.

CSM sentiment should account for less than 25% of the customer health score



CSM sentiment should account for more than 25% of the customer health score.

Debate Summary

Arguments for: CSM sentiment should account for more than 25% of the customer health score

CSMs often pick up warning signs before the data does

If there are multiple stakeholders involved, sentiment can be the best indicator

If CSMs are well trained, they should be the best resource for customer health, using the health score as a supporting tool

Arguments for: CSM sentiment should account for less than 25% of the customer health score

CS sentiment can be too subjective

Adoption metrics are more important than CS sentiment

If CSMs are well trained, they should be the best resource for customer health, using the health score as a supporting tool.

ARGUMENTS FOR

CSM sentiment should account for more than 25% of the customer health score.

“A good CSM will often pick up on potential warning signs before the data does. Vice versa they’ll also be aware of mitigating circumstances that cannot be reflected in binary data.”

Jon Triggs

Head of Customer Success, Fluent Technology

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“If your CSM opinion doesn’t matter then why do you even have one. If your CSM is the one person that is meant to be closest to your customer, knowing & understanding them intimately then why waste that insight. However, there are some criteria needed around that to ensure it has the proper context.”

Matt Myszkowski

Founder, CustomerSuccessMatters

“Depending on your book of business, sentiment might be the best indicator especially if you have multiple relationships across the organization.”

Star Hofer

Vice President of Customer Success, PartnerStack

“If you are training your CSMs well, they should know the health of their customers. The adjacent data in a CS tool should confirm or challenge their sentiment, but not overrule it.”

Alex Farmer

VP Customer Success, Cognite

“CSM sentiment represents in real time the actual status of an account, when we talk about high touch accounts.”

Jessica Araujo

Customer Success, Sensedata

“CSM sentiment should represent an average of 50% of the client’s health score. The other 50% is distributed over the areas responsible for the product or service. As a customer advocate and manager, the CSM needs

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to be fully responsible for half of that feeling and engage the entire team responsible for delivery, service and product with numbers and facts.”

Victor Paulinno

Customer Success Pleno, Febracis Coaching

ARGUMENTS FOR

CSM sentiment should account for less than 25% of the customer health score.

“Need to remove as much subjectivity from the score as possible, but not completely. There needs to be room left for educated opinion.”

Peter Armaly

Senior Director, Customer Success Enablement, Oracle

“Adoption should be a primary metric, the rest depends on the application, service, or product.”

Ari Hoffman

Director of Customer Advocacy, Coveo

“CS Sentiment is important, but sometimes can be misused in the context of a health score. In some organizations where there is a lot of focus (negative focus) on “Red” accounts, CSMs might falsely indicate the health of the partnership which could skew the data resulting in unforecasted risk. Using Qualitative and Quantitative data appropriately is the best way to structure the health score.”

Kristi Faltorusso

VP of Customer Success, IntelliShift

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CSM SENTIMENT

General Consensus

Whether or not 25% is the magic number is up for debate, however, by a narrow margin, respondents do lean in favor of having CSM sentiment count for more than 25% of the customer health score.



TOPIC 9

Shared Slack Channels



Shared Slack Channels

QUESTION

Is it effective to use shared Slack channels for customer management?

Shared Slack channels are a very effective way for CSMs to communicate with and support their customers

49%

Shared Slack channels are an inefficient and unreliable way for CSMs to communicate with and support their customers

20%

31%



Shared Slack channels are a very effective way for CSMs to communicate with and support their customers.

Debate Summary

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Arguments for: Shared Slack channels are a very effective way for CSMs to communicate with and support their customers.

Slack allows for streamlined communication and increased collaboration.

Customers see it as a huge value add to have the easy access to vendors.

Slack channels increase productivity and decrease time spent chasing emails.

Arguments for: Shared Slack channels are an inefficient and unreliable way for CSMs to communicate with and support their customers

Expectations around response times can lead to disappointing customers instead of making them happier.

Inability to measure anything or glean meaningful data/metrics can make it a communication "black hole".

SLAs become redundant and it becomes extremely difficult to document customer interactions.

ARGUMENTS FOR

Shared Slack channels are a very effective way for CSMs to communicate with and support their customers.

"Think about all of the reasons you use Slack with your internal colleagues. You build rapport, make decisions faster, and integrate workflows to support communication. It is a higher level of collaboration. You can't get that from email. Why wouldn't you want to get to that level with your customer?"

The common fear is that a shared Slack channel will be misused and turn into a 24x7 support mechanism. Be clear about the ground rules and why customers should work through official support mechanisms to get support.

Think about every time an implementation or initiative with the customer stalled. It's not because there was too much communication and collaboration. It's because there wasn't enough. Slack channels solve this."

Junan Pang

Senior Manager, Customer Success, Slack

"We actively use shared slack channels with our customers. In fact, just recently, I spoke with a leader during an exec<>exec check in and he mentioned that the shared slack channel has been a monumental part of our partnership. He said if we did more in services, it would be to offer that."

Lauren Costella

VP of Customer Success, GoodTime.io

"Slack streamlines responses, increases team productivity and energy."

Hiram Damin

Head of Customer Success, Jutsu Digital

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ARGUMENTS FOR

Shared Slack channels are an inefficient and unreliable way for CSMs to communicate with and support their customers.

“There are certain tools that come with preconceived expectations around response times and Slack is one of them. While it is great to give your customers another channel to reach you, it can create more trouble in the long run. Things like SLAs go out of the window with Slack channels (you can’t really measure them), you’ll likely be fielding support questions and lastly, you risk not documenting the interaction/work you’ve done.”

Diana De Jesus

Customer Success Manager, Catalyst

“There’s no way to record the interactions, chronology of attendance, average time of dedication to each account, main requests, deadline for resolution, etc. I also don’t see how to measure things on Slack. I prefer channels that can generate this information very simply.”

Roberta Silva

*Fundadora e co-fundadora especialista,
Consultoria de Sucesso / Cliente Cast*

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“It’s very challenging to ensure a rapid response at all times, which an open Slack channel may signal. This could result in customer disappointment instead of adding something positive to the experience.”

Mary Poppen

Chief Customer Officer, Glint at LinkedIn

“This only works if the CSM has a communication tool to centralize communication apps. Otherwise CSMs are left with dozens of shared channels that are impossible to manage effectively.”

Chris Hicken

Co-Founder & CEO, 'nuffsaid

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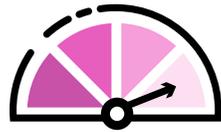
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SHARED SLACK CHANNELS

General Consensus

Opinions were quite polarized on this topic. In general, one can glean from the responses that Slack channels can be an extremely effective way to communicate with and support customers, but only if there are strict rules and boundaries, with clearly set and enforced expectations. Without that, it becomes a “wild west” situation that can lead to a very negative customer experience. In order to gain all the benefits Slack has to offer, teams must be extremely intentional in the way they go about using it to support customers.



TOPIC 10

Net Promoter Score



Net Promoter Score

QUESTION

How much impact should NPS have on the customer health score?

NPS should be a very significant component of a customer health score

NPS should be a very insignificant component of a customer health score



NPS should be a very insignificant component of a customer health score.

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Arguments for: NPS should be a very significant component of a customer health score.

If a customer is not willing to promote your product/service, it's a clear indicator that something is wrong.

NPS identifies who would be good to approach for a case study or a referral.

NPS is an effective indicator of customer health when used and implemented properly.

Arguments for: NPS should be a very insignificant component of a customer health score.

NPS measures intent, not behaviour. It's only good to identify champions.

NPS is easy to manipulate and can lead to CS teams focusing on the wrong issues.

Net Promoter Score measures "promotion" not "health" - two things that are important but very different.

ARGUMENTS FOR

NPS should be a very significant component of a customer health score.

"The ability to indicate, defend or not defend a brand is very significant. The metric cannot be considered in isolation, it needs to be composed and I don't see a better way than within the client's health score. If the client pays, accesses and has the ability to refer, it's great. If they don't pay, access and have the ability to refer, something is wrong."

Roberta Silva

*Fundadora e co-fundadora especialista,
Consultoria de Sucesso / Cliente Cast*

“Strong advocate of relational NPS in healthscore for it not only helps with early warnings on churn but also helps identify advocate customers who can be targetted for the next case study, reference & growth opportunities.”

Vipin Thomas

Director - Revenue Operations, SurveySparrow

“NPS should be a significant portion of your customer health score if it’s administered properly and regularly to your client base. If there’s no response, or you find that clients often misinterpret, it may be time to review whether this is helping your company in the manner that it’s being administered.”

Alex Kaufman

Senior Customer Success Manager, Signal AI

ARGUMENTS FOR

NPS should be a very insignificant component of a customer health score.

“NPS is the worst (health) metric out there. It’s measuring intent and not behavior. Use NPS for Champion identification or sponsor discontent...nothing else.”

Wayne McCullogh

Head of Customer Success, Google Cloud, Google

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“Of all CS metrics, NPS may be the easiest to manipulate. When looking at the big picture it is one of many important data points to capture, but giving this score too much weight may not be doing you any favors. In fact, placing a premium on half-baked NPS score may be skewing your limited time and resources to the wrong areas of the business.”

Sheik Ayube

Sr. Director of Business Development, ESG

“NPS stands for net PROMOTER score. It indicates how much your customers are inclined to promote you. Healthscore indicates if the customer is successful or not (churn and expansion patterns), so both fit for different outcomes inside your company. NPS could give you lots of good feedback on your product/service and you can use it to build an advocacy strategy, but it shouldn’t be your driver for loyalty and customer success.”

Lilian Franco

Head of Customer Success & Care, Wirecard Brazil

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NET PROMOTER SCORE

General Consensus

Considering that nearly every CS org measures NPS, it was surprising to see that the vast majority of respondents are not fans of using it as a health metric. By and large, leaders do not believe it is effective in measuring customer health, and those that are fans of NPS, are fans of its ability to identify champions and potential case studies, not predict customer behaviour. The general consensus is that NPS should be measured and looked at, but should not be a significant component of a customer health score.



In Conclusion

Throughout this ebook, we've highlighted the considerable opposing views that prominent Customer Success thought leaders hold on key CS issues. This is not meant to determine whether someone is "right" or "wrong" but to clearly highlight the different perspectives brought to these topics which continue to be so widely debated and discussed.

It is remarkable and worthy of taking a moment to recognize that this is where we've gotten to as an industry. We're no longer disputing the basic functions of a CS team, we're digging into the nitty gritty of the function, and going deeper into the important issues that will allow the Customer Success field to continue its incredible growth rate over the coming years.

We want to thank all the leaders who contributed to this ebook - we know it wasn't easy to pick one option or the other when there are so many factors to consider. Hopefully this ebook has served its purpose of provoking thoughtful discussions, and creating meaningful positive change within organizations.



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