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Developing customer success tools for a B2B SaaS company.

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Abstract

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Recent breakthroughs in technology have enabled a worldwide shift from selling software in physical disks to selling it online as a service. This change has given rise to a subscription-based business model where software companies offer their services based on recurring payment plans. This significantly alters the focus of companies that operate in SaaS business from the value of the initial transaction to the lifetime value. To maximize customer lifetime and economic value derived from it, a new business function called customer success has emerged.

The objective of this product-based thesis is to develop tools for increasing the maturity level of customer success processes in a B2B SaaS company called TalentAdore. TalentAdore is a technology company from Finland that offers recruitment software called Virtual Recruitment Assistant. Completion of the thesis entails following a predefined project implementation plan, developing product and documenting the process of its creation.

Five project steps are listed below:

- Discover the context of business need and establish the initial knowledge base.
- Define the maturity level of customer success processes at TalentAdore and identify the project's focus areas.
- Develop and test solutions which contribute to increasing the maturity level of customer success processes.
- Deliver applicable products, evaluate their applicability, deliver recommendations for further development, and reassess the maturity level of customer success processes at TalentAdore.
- Discuss conclusions, evaluate the project, present author's reflection of own learning and professional development.

The work involves formalizing the knowledge surrounding the concept of customer success and developing four tools: dashboard for monitoring usage data, visualization of the customer lifecycle, onboarding playbook, and customer health card. Tools are created gradually one by one and tested in real business operations. The last chapter includes a discussion of what has been done throughout the whole thesis and evaluation of the project. The author's assessment of one's learning is presented at the end.

The thesis was conducted from May 2018 to May 2019. During this period, the thesis author was employed as a full-time trainee with the purpose to implement the project and generate applicable results.

Keywords
Customer success, software as a service, business to business, subscription-based business model, recurring revenue.

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1 Introduction

This chapter aims to describe the scope and delimitations of the thesis. It provides brief introduction to the topic, commissioning company, key concepts, objective, product, and thesis structure.

1.1 Introduction to the topic

Recent breakthroughs in technology have enabled a worldwide shift from selling software in physical disks to selling it online as a service. This change has given rise to a subscription-based business model where software companies offer their services based on recurring payment plans. It means that the economic value of customers is realized simultaneously during the relationship between companies and customers. This significantly alters the focus from the value of the initial transaction to the lifetime value. Consequently, a new business function, called customer success, is expanding among software as a service companies that depend on the length of customer lifetime and their ability to maximize it. (Forrester 2014, 2.)

While the rationale behind increased attention to maintaining high retention rates seems self-evident, the new concept of customer success remains unclear to many people operating outside the subscription-based business field. The imperative of this thesis is to explore knowledge surrounding customer success and apply it to the process of creating an applicable product.

1.2 Ccommissioning company and background

TalentAdore is a startup company from Finland that offers an applicant tracking system called a Virtual Recruitment Assistant. In practice, an applicant tracking system is a software that enables its users to handle electronic job applications. Founded by Saku Valkama and Joni Latvala in the year 2014, the company strives to the best candidate communication solution provider in the World. (TalentAdore 2019a.) The company's team consists of 15 employees who share the same passion and motivation towards bringing the human touch back to recruitment (TalentAdore 2019b).

In April 2018, the author expressed her interest to enhance TalentAdore's processes in such a way that takes into consideration customer perspective and is effective for the business. An opportunity to connect this interest to a real business need was recognized. Hence, a collaboration between the author and TalentAdore was established in May 2018.

Thesis author was employed as a full-time trainee with the purpose to obtain a comprehensive understanding of the business and generate applicable results. The thesis writing process was concluded in May 2019.

The company's motivation to implement this product-based thesis was stimulated by the rapidly growing customer base and lack of standardized customer success processes. TalentAdore's business model largely depends on its ability to design effective and customer-centric processes that can be scaled for well-justified cost (Kooij & Pizzaro 2015, 13).

1.3 Key concepts and abbreviations

The synergy between "customer" and "company" is described throughout the work. Therefore, it is important to understand the nature of both words within the context of this thesis. "Customer" usually refers to the party which has subscribed to a software as a service; it can either be an individual or another business. "Company" typically refers to the party selling the service, in this case - TalentAdore.

The words "service" and "product" are used interchangeably and mean a software application which is delivered as service.

Business-to-business (B2B) - the process of one business doing a commercial transaction with another business, stands for business-to-business.

Business-to-customer (B2C) - the process of business doing a commercial transaction with consumers, stands for business-to-consumer.

Customer Lifetime Value (CLV) - a metric that attempts to estimate the anticipated profitability of each customer relationship, stands for customer lifetime value.

Software as a service (SaaS) - a software application which is delivered as service over the internet, stands for software as a service

Customer Success (CS) - business function focused on maximizing the length of relationship with customers and monetary value derived from it, stands for customer success.

1.4 Thesis objective

The objective of this product-oriented thesis is to develop tools for increasing the maturity level of customer success processes at TalentAdore. The company provides software as a service application to other businesses. Hence, it operates in the business-to-business sector. Customer Success is a rapidly emerging business function, especially common among software technology companies. People in customer success team hold responsibility for managing customer relationships, maximizing the length of the lifetime and monetary value derived from it. In other words, people facilitate various customer success processes to achieve specific outcomes. Within the context of this thesis, maturity indicates the extent to which processes are streamlined and advanced. To create a product which optimally serves the objective, the maturity level of customer success processes at TalentAdore is assessed. Increasing process maturity is important because of large benefits that it can bring to the whole company, such as enhanced efficiency and scalability, control over business outcomes, and the ability to do risk mitigation.

1.5 Product

The thesis product targets TalentAdore's stakeholders. Nevertheless, other early-stage companies which deploy similar business model may also take advantage from the knowledge accumulated during the product creation. Based on the author's observation and findings from the customer success maturity assessment, the thesis author recommends four customer success tools. Tools are created gradually one by one and tested in real business operations. The product evaluation is based on the following components: tool applicability to the case company's daily operations, its contribution to increasing maturity of customer success processes, and author's observations. The description of each tool is concluded with clear recommendations for future development.

1.6 Thesis structure

The thesis consist of seven main chapters. Introduction part, chapter 1, gives an overview of the thesis and commissioning company. Chapter 2 presents the project plan and methods used to create the product. Chapter 3 compromises knowledge base about the evolution of software as a service, emergence of customer success, customer success lifecycle, and the key customer success activities. Zipper method is used starting from chapter 3 by explaining how theoretical components are put into practice at TalentAdore. In chapter 4, "The 10 Laws of Customer Success" are used to identify existing and none-existing customer success processes. Moving forward, chapter 5 introduces customer experience

maturity model for conducting an assessment of customer success maturity at TalentAdore. Chapter 6 describes the process of developing customer success tools, their applicability, and recommendations for further development. TalentAdore's customer success maturity at is reassessed at the end of the project. The discussion section, chapter 7, provides summary, conclusions, and suggestions for further development, as well as the author's assessment of one's learning. References and appendixes are presented at the end.

1.7 Delimitations

It is crucial that delimitations are defined at the beginning of the thesis writing process. Similar functions to customer success are not explored in this thesis. The work does not address in-depth knowledge about SaaS sales principles and subscription-based business models. The focus is narrowed down to the case of commissioning company which operates in the B2B sector. Consequently, information about how the same phenomena's works in the B2C sector is not studied in detail. All tools and recommendations are developed within the specific context of the commissioning company. Identifying the extent to which created tools can be used in other types of organizations lies beyond the scope of this study.

Considering that customer success theory is still in the hands of practitioners, limitation of academic work done up to date has to be considered. The author has carefully selected references used for the literature review. The reputation of organizations and background of individuals are considered when choosing sources. It is acknowledged that materials published by commercial organizations may be influenced by the interest to accelerate their business value and credibility. (Walliman 2011, 79.) Nevertheless, the literature used in this work comes from organizations and people that the author considers reliable. The use of static materials like books, journals, research papers, and other relevant documents from the web is maximized as much as possible.

2 Project plan and data collection methods

A framework used for creating a detailed project plan is described in this chapter. This plan is expected to guide the author's actions towards reaching the objective. Accomplishing certain tasks during each phase of the project's lifecycle is prerequisite for being able to move forward. To support the project implementation and ensure successful delivery of the final product, various methods are introduced.

2.1 Project plan

Projects usually are introduced to achieve a certain objective and have a finite duration. Nevertheless, produced deliverables can exist for an unidentified period (Project Management Institute 2017, 4–5). To demonstrate the project's intended lifecycle (figure 1), the author has chosen to use a Double Diamond model (Johnson & Parente 2013, 13). This model is commonly used for mapping out design processes of products and services. Both diamonds consist of two distinct parts - one where it is intended to diverge options as extensively as possible and one where it is expected to converge them based on certain criteria. (Design Council 2007, 6.)

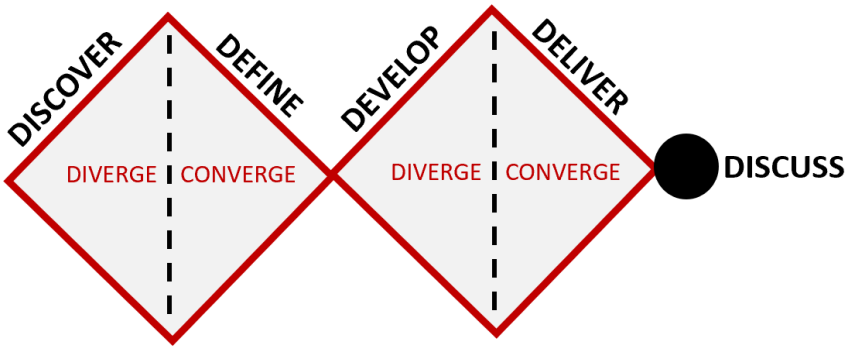


Figure 1. Project's intended lifecycle based on the Double Diamond model (adapted from British Design Council 2007)

The British Design Council describes four phases of the Double Diamond. "Discover" phase - insights and knowledge surrounding the subject are explored, problems, and ideas for possible solutions are gathered. "Define" phase - information collected during the previous phase is analyzed and structured, priorities are established based on organizational needs, nature of the objective to be addressed is defined. "Develop" phase - the product or service concept is introduced, various solutions are created, tested, and prototyped together with end users. "Deliver" phase - the most applicable solutions are launched based on trials and errors observed in the previous phase, an assessment of the final deliverable is carried out, mechanisms obtaining further feedback are introduced.

(Design Council, 7–9.) As figure 1 illustrates, the thesis author has included additional phase called “Discuss”. This phase indicates the discussion which happens upon completion of the project.

Following items are reflected in table 1 to present the project plan: five distinct project steps developed based on the Double Diamond framework, a specific timeline, and chapter numbers which correspond to each step.

Table 1. Project steps

Step	Timeline	Chapters
1. Discover the context of business need and establish the initial knowledge base.	May 2018 – Aug. 2018	1, 2, 3, 4
2. Define the maturity level of customer success processes at TalentAdore and identify the project’s focus areas.	June 2018 – Sept. 2018	4,5,6
3. Develop and test solutions which contribute to increasing the maturity level of customer success processes.	Aug. 2018 – Feb. 2019	6
4. Deliver applicable products, evaluate their applicability, deliver recommendations for further development, and reassess the maturity level of customer success processes at TalentAdore.	Sept. 2018 – May 2019	6
5. Discuss conclusions, evaluate the project, present author’s reflection of own learning and professional development.	May 2019	7

Despite the fact it is expected to finish one step before moving to the other one, it may not be the case considering authors limited experience with the subject matter. It can be necessary to review previous conclusions as her knowledge and skills evolve. It is common in research based on qualitative data to reiterate certain processes until satisfactory understanding is achieved. (Walliman 2011, 128.)

2.2 Methods used for the creation of product

To ensure that the final deliverable applies to TalentAdore’s business need, a service design approach is taken into consideration throughout the project implementation. As stated by service design expert Birgit Mager (2009, 34), “Service design addresses the functionality and form of services from the perspective of the user. It aims to ensure that service interfaces are useful, usable, and desirable from the client’s point of view and effective, efficient, and distinctive from the supplier’s point of view”.

The product creation process compromises the following characteristics of service design principles: human-centered, collaborative, iterative, sequential, real, and holistic. This

implies that the needs of all stakeholders who are impacted by the product are taken into consideration. Moreover, stakeholders from various backgrounds and disciplines actively contribute to the co-creation of the service. The service design approach is explanatory, making it acceptable to start with simple experiments, fail, and adapt based on findings. Typically, explored phenomena is illustrated as a part of interrelated processes. It is crucial that potential improvements are prototyped in practice to ensure that they address a real need. Last but not least, the service design approach strives to transform intangible aspects of the service into physical reality. (Lawrence, Marc & Hormess 2018, 25–27.)

Desktop research is carried out throughout the work to explore secondary data that has already been produced with regards to the subject of customer success (Myers 2009, 122). A literature review is crucial for understanding the context of the project and developing the product.

To obtain rich and context-specific primary data, the author adapts qualitative research methods. Majority of collected insights come from participant observation done while the author is interacting with observed group setting (Gray 2009, 185). Unobtrusive data is utilized (internal documents, information, digital archives) with the purpose to obtain more in-depth understanding than with observation alone. Moreover, it is not only the content that is analyzed but also the way how it is generated, distributed, and used to meet different objectives (Atkinson & Coffey 2004, 57). TalentAdore's stakeholders are engaged in semi-structured and unstructured interviews that help to investigate a wide spectrum of topics in context. This approach is chosen to pursue new perspectives and knowledge which may be skipped when using rigidly predefined interview questions only (Myers 2009, 104). At the beginning of the project, the author also moderates a group discussion. It reveals much information about the collective view on customer success processes in the company.

Despite the fact, qualitative research methods are criticized for being less valid and reliable by quantitative researchers, they can be a beneficial source of information when little is known about the subject, or new perspectives should be discovered. Also, it is a great tool when a small number of samples in a specific context is studied. Conducting qualitative research requires developing the sense of being insightful, having the ability to distinguish which data points are relevant, and maintaining objectivity. The chosen methods deeply engage the author with people and processes which are studied. Hence, her constructed interpretations, views, and feelings become part of research data. (Gray 2009, 164–184.)

Deployment of various methods has a significant role in supporting the work. It is considered as a good practice to use method triangulation in which two or more methods are applied when examining the same phenomenon. Triangulation can also be associated with using diversified sources of data. The overall goal of triangulation is to see the studied phenomena from different angles, increase data reliability, and reduce the likelihood of bias findings. (Grix 2010, 135–137.)

3 The emergence of customer success

This chapter aims to establish an advanced understanding of how customer success has emerged. Firstly, the author explains the origins of “software as a service” and how it correlates to TalentAdore’s business model. Secondly, numerous interpretations of “customer success” concept are explored before moving forward to practical nature of customer success and how it is carried out at TalentAdore. A technique called zipper approach is used throughout this chapter to combine reviewed theory with practice whenever it is applicable.

3.1 Software as a service

SaaS is a software distribution model where a complete application is delivered as service to its consumers over the internet. It is service providers duty to maintain the application. Hence several responsibilities are taken away from a service consumer and shifting the way software companies work. (Kavis 2014, 17–18; Simon 2010, 101.) These are few most common areas that service providers handle when providing applications: underlying infrastructure, user interfaces, servers, databases, security and privacy, new features, and backups (Kavis 2014, 60).

Introduced around the time of Internet boom in the year 1995, the new concept disrupted the software industry and led to subscription-based licensing. In this concept, the software is being leased instead of being purchased, replacing one-time payment to recurring monthly or yearly fee. Decreased costs, a large variety of solutions, and time-based commitments make it easy for consumers to change from one service provider to others if they want to. (Mehta, Steinman & Murphy 2016, 15.) This significantly alters the focus of companies that operate in SaaS business from the value of the initial transaction to the lifetime value.

“Customer lifetime value … is a forward-looking metric that attempts to account for the anticipated future profitability of each customer relationship” (Farris, Bendle, Philli & Reibstein 2010, 166). To derive CLV, setup and retention costs are subtracted from the monetary lifetime value of the customer. The length of customer lifetime directly affects the recurring revenue derived from it. If rates of existing customers discontinuing their subscriptions are very high, then the business is unlikely to sustain itself by obtaining new customers. This is related to large upfront costs of new customer acquisition versus comparatively small monthly payments. It does not take long for a company to reach the

point when the main source of revenue comes from the installed base, making it obvious why a majority of customers should remain as such. (Mehta & al. 2016, 23.)

TalentAdore is a SaaS company that deploys a subscription-based business model. To access the product, B2B customers pay a recurring monthly fee. “A business model describes the rationale of how an organization creates, delivers and captures value” (Osterwalder & Pigneur 2010, 14).

The Virtual Recruitment Assistant streamlines the recruitment process and automates manual and repetitious tasks allowing recruiters to spend more time on communication with candidates instead of administrative, low value-add tasks. It also helps companies to enhance their employer brand by focusing on candidate experience. The TalentAdore’s solution’s unique value proposition is capability enabled by Natural Language Processing and Artificial Intelligence - it allows recruiters to send 100% personalized status updates and feedback messages to each job candidate individually and with no extra time. To sum up, the Virtual Recruitment Assistant helps recruiters to handle the entire recruitment process from job postings to hiring decisions. (SAP App Center s.a.) The company’s CEO introduces the business in the following way:

> “Current recruitment systems do not serve companies nor candidates optimally. Recruitment is broken. A typical example: 100 people apply for a job, one is selected and 99 rejected. One person wins, and many of the 99 end up having a bad candidate experience because recruiters have no time to communicate with candidates manually. Any recruiter never sees up to 70% of applicant resumes. There are too many applications for any person to review. In other words, candidates receive only an impersonal rejection email or no communication at all. The heavy recruitment process leaves many of the 99 applicants so disappointed at the company that they decide to boycott the company’s products, and never apply again even when they have the right skills for the same company’s other vacancies. Existing solutions with their out-of-date features promote this behaviour. We are changing this. Company’s product changes the rules of recruitment. By putting candidates into the center of attention, recruitment is no longer a cost generating function but a strategic matter that truly impacts companies’ business results (Valkama 26 April 2018)”.

The product is available in Finnish, English, Spanish, Swedish, and German languages. It enables collaboration between users who have different types of internal and external user privileges such as admin rights, recruiter rights, hiring manager rights, and reader rights. The most common activities performed with the help of the TalentAdore’s solution are: creating job ads (positions), evaluating received candidate applications, sending recruitment status updates and other messages, scheduling interviews, informing candidates about recruitment outcomes, collecting candidate experience ratings, analyzing stats, and building Talent Community for future needs. The product’s user interface (figure 2) compromises seven pages: home, positions, applications, calendar, Talent Community, statistics, company settings, personal user preferences.

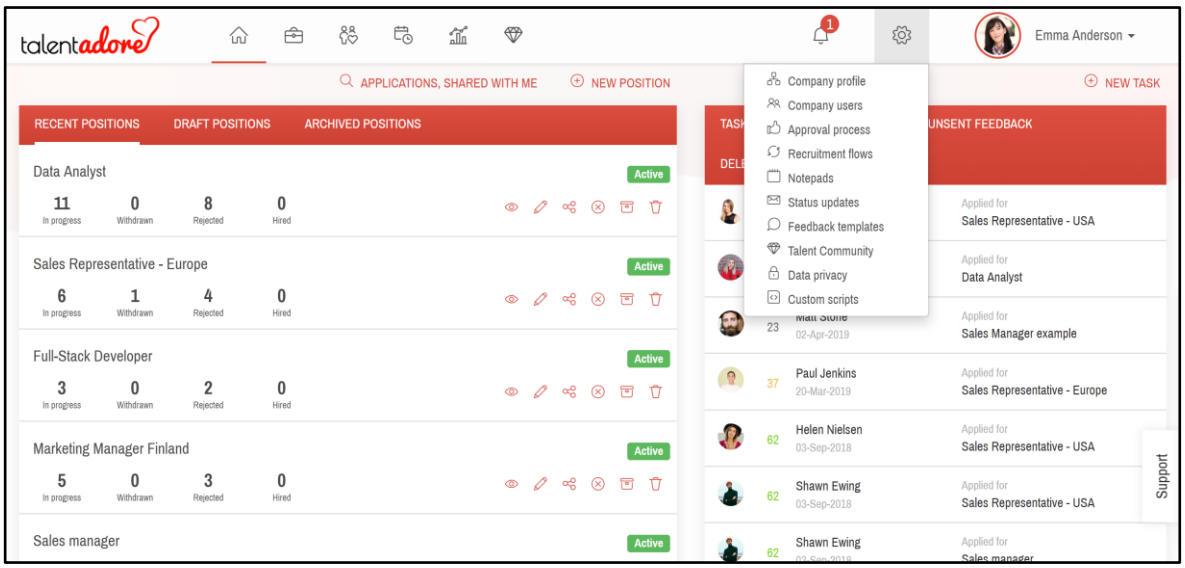


Figure 2. Virtual Recruitment Assistant's user interface (TalentAdore 2019c)

Exactly as described in the previously reviewed literature, TalentAdore's business depends on its ability to maximize CLV. New customer acquisition and onboarding are associated with costs that can be justified only if customers continue their subscription for a meaningful period. That is why Kooij and Pizzaro suggest that SaaS entrepreneurs must be aware of how much time it takes for the company to start generating profit from new customers (2015, 40).

To conclude, the following quote emphasizes one of the most important changes caused by the new era of SaaS: "In traditional business, the customer relationship ends with purchase. But in a subscription business, the customer relationship begins with the purchase" (Mehta & al. 2016, 9). This shift lays the ground for the emergence of customer success.

3.2 What is customer success

Having described the general implications of SaaS evolution and its current relevance, this section moves on to reflect ongoing discussion about the concept of customer success. CS is a new, evolving business function mainly rooted in the software industry, although many customer success practitioners foresee and argue its relevance as a new operating model in other, none SaaS businesses. (Mehta & al. 2016, 45; Nirpaz & Pizarro, 2016.)

Around ten years ago, Bessemer Venture Partners, a worldwide venture capital company that excels its operations in cloud computing, published a guide for their network of executives. The work gained publicity and became known as the ultimate guide of SaaS globally. The updated version of the guide called “Bessemer’s Top 10 Laws of Cloud Computing” was released in the year 2012. (Bessemer Venture Partners 2012, 2–3.) It contained many ideas discussed in this project, although the concept of customer success was not present yet.

In the year 2014, Forrester, a research-based consulting company, interviewed senior decision makers from 13 SaaS companies in the USA to explore customer success management. The study proposed that a role of CS depends on company’s growth phase, but at the core its purpose is “…to make customers successful with products they have purchased, ensuring that they are realizing economic value from their investments in order to preserve revenue” (Forrester 2014, 2). Similarly, an independent consulting firm called Mainstay introduced a white paper with goal to analyse the return on investment in customer success revealed “…boosting retention requires comprehensively managing the satisfaction and success of customers, keeping all health metrics up to date, and moving proactively when warning signs appear in any given account” (2014, 1). Both research papers were commissioned by Gainsight, one of the first customer success software providers.

Following the disruption of SaaS companies, and growing interest about customer retention, a reproduced guide called “The 10 Laws of Customer Success” was published by Bessemer Venture Partners. The guide, written by CS practitioners, suggested that customer success is not only a separate function but a company-wide philosophy and commitment. It covered topics everyone in the company should be aware of to drive top performance in recurring revenue business. Moreover, the guide reinforced the idea of achieving financial results by making sure that customers realize the desired business value. (Bessemer Venture Partners 2015, 2)

One of the early books about the topic, called “Customer Success: How Innovative Companies Are Reducing Churn and Growing Recurring Revenue”, was published in the year 2016. It was written by three customer success pioneers: Nick Mehta and Dan Steinman from Gainsight, and Lincoln Murphy from Sixteen Ventures, the CS consulting company. The first part of the book provided insights about nature and relevance of customer success, while the second part of it incorporated “The 10 Laws of Customer Success” mentioned in the previous paragraph. Authors of the book give a concise description of CS: “At its essence customer success is the organization that focuses on

the customer experience with the goal of maximizing retention and life-time value" (2016, 23).

Guy Nirpaz, founder of CS software company called Totango, and Fernando Pizarro, a senior executive who writes about B2B startups, CS, and SaaS sales organizations published a book called "Farm Don't Hunt: The Definitive Guide to Customer Success". In this book they addressed CS programs (Nirpaz & Pizarro 2016) "…implementing a program of customer success means managing your overall customer base and making choices about how to apply your limited resources to the segments of customers that will offer the greatest benefit to your business, both in terms of current and future revenue, all while ensuring that every customer is provided with appropriate value from your product".

Dominique Levin and Jacco Van Der Kooij introduced an alternative perspective on what indicates real customer success in their book "The SaaS Sales Method for Customer Success & Account Managers: How to Grow Customers". They claimed that achieving real CS is neither acquiring nor retaining customers, but expanding existing customer accounts. Expansions typically happen through upselling and cross-selling. Upselling is an activity of increasing monthly recurring revenue obtained from the same service or other service provided by the same department. Cross-selling means acquiring additional monthly recurring revenue from sales conducted with another department. (Levin & Kooij 2018.)

There is a wide range of terms that are mixed up with the CS concept, e.g., customer experience, customer retention, customer relationship management, customer engagement, customer advocacy, customer loyalty, and customer support (Mehta & al. 2016, 31–32). Notwithstanding the strong relationship between all terms listed above, a consensus exists among people involved with SaaS businesses that there is a need for the new concept. This need stems out of the following factors (Mehta & al. 2016, 29):

- it is vital for SaaS business to thrive
- it enforces new skills and competencies
- it introduces new activities and performance metrics.

To understand customer success nature in greater detail, a number of unique characteristics of CS are explored herein: proactive, revenue-driver, success oriented, analytics-focused, predictive. Opposite to customer support, people working in CS organization do not wait for things to unfold before acting, they proactively identify customers that show signs of upsell opportunities or possible threats. Typically, CS organization is directly in charge of managing renewals, upsells, and churn (subscriptions that are discontinued), although in some cases it can be the responsibility of sales.

Depending on the field of business, various metrics are used, but in all instances, they directly or indirectly contribute to the likelihood of success (renewal rates, upsell percentages, customer satisfaction, and growth of installed base). Analytics help to identify timely and relevant moments to engage, optimize the work of CS managers and prioritize customers that should be acted upon the first. The goal of CS organization is to develop a forward-looking mindset and provide crucial assistance before customers inquire it themselves. (Mehta & al. 2016, 35–36.)

To conclude, there exist many complementary interpretations of customer success. All of them possess similar characteristics and shared perception that CS is at the core of ensuring financial sustainability and growth of the subscription-based companies. Any SaaS company, inducing TalentAdore, can expect three fundamental advantages from doing customer success well (2016, 25)

- reducing and managing churn
- increasing the contract value of existing customers
- enhancing customer experience and satisfaction.

According to Steve Andresen and Dave Stein, “Customers consider themselves successful when a positive outcome they have envisioned as possible is achieved and becomes a reality” (2016). In the context of SaaS business, delivering expected outcomes is an ongoing process instead of being a one-time instance of selling something. Thus, the next section, concentrates on customer success cycle and key activities.

3.3 Customer success cycle and key activities

Following the extensive discussion about customer success as the concept, the paper moves on to arguably the most important - explaining how CS works in practice. To clarify the rationale of customer success cycle, a simplified example of a typical sales process should be reviewed in figure 3.

Figure 3. The sales funnel (adapted from Nirpaz & Pizarro 2016)

Different phases in the upsidedown pyramid or funnel visualize the path that customers undergo before making a purchase. The likelihood of deals being closed increase as the potential customers move closer to the bottom of the funnel. The main target is to achieve as many one-time business transactions as possible. (Armstrong & al. 2008, 2–3.) Although product quality, customer experience, and advocacy matter for making customers return, it is not as essential for the existence of companies which do not operate in SaaS business comparing to those which do. The main difference between the sales funnel and customer success cycle is that the later one is focused on the company's performance across the entire customer life span instead of a one-time purchase (Nirpaz & Pizarro 2016). The sales funnel still applicable to new customer acquisition. Therefore, the author has decided to include it besides the illustration of customer success cycle in the figure 4.

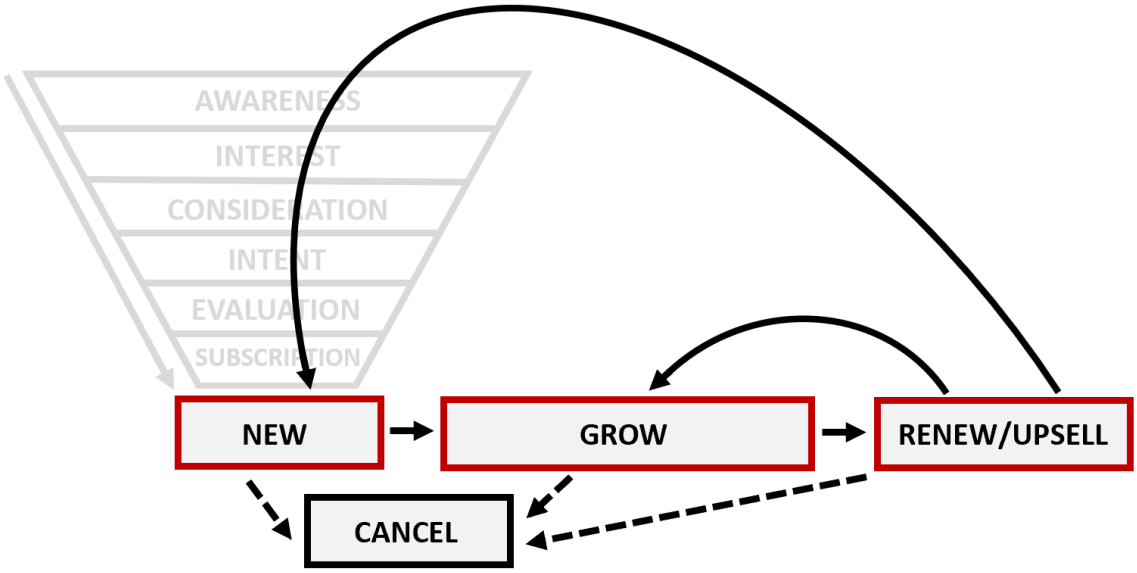


Figure 4. Customer success cycle (adapted from Nirpaz & Pizarro 2016)

SaaS companies must provide the service and some level of engagement simultaneously during the whole customer lifetime. The end of customer success cycle means that the customer has decided to stop using it. The situation in which a customer does not renew or discontinue the subscription is called churn. (Nirpaz & Pizarro 2016.)

The main components of the customer should be well understood when being involved in a subscription-based business. The phase when the customer has committed to subscribe for a service is called "New". The company usually conducts an onboarding to ensure that the customer obtains the first value as soon as possible and is on good path to successful product adoption. The phase in which the customer realizes the value by using the

product is called “Grow”. During this phase, the company implements various engagement activities with the purpose to build a relationship and increase the value. Typically, the customer spends most of the time in this phase of the lifecycle. During the “Renew and upsell” phase customer decides to renew or expand the usage of the product. This is the relatively short, but very important period that determines future revenue. The decision typically is depending on the customer’s experience in the “Grow” phase. Finally, the “Cancel” phase indicates the end of customer success lifecycle. All previous parts of CS lifecycle should be designed in a way that prevents arriving from cancellation for an as long time as possible. Churn is not a result of poor adoption in all cases; it can also be triggered by other factors that are not under the direct control of the service provider. Naturally, it is impossible to avoid some level of churn. (Nirpaz & Pizarro 2016.)

Different activates are performed in each of customer lifecycle phases to maximize customer lifetime value. A simplified illustration of the most common CS activities is presented below (figure 5).

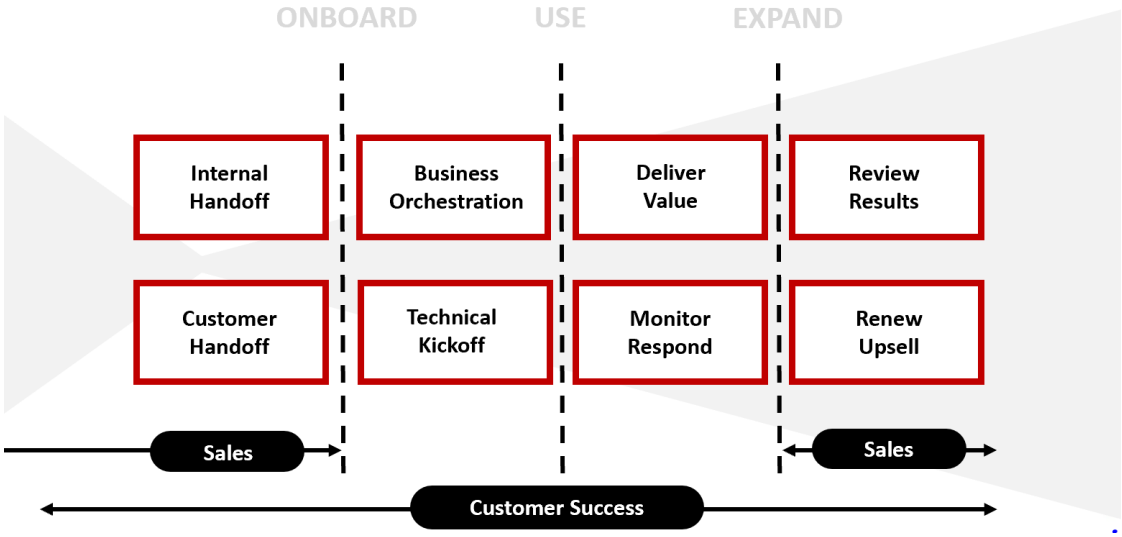


Figure 5. Customer success activities (adapted from Levin & Kooij 2018)

When a customer has committed to subscribe for the service, an internal handoff is organized between sales and customer success teams to share all relevant information. Internal handoff may involve coordination between multiple business functions in large companies. The assistance of the customer success team may be used sometimes as a tool for influencing the outcome of sales negotiations before the customer has made a final decision. During a customer handoff, the sales team passes the responsibility for the customer to the customer success team, an introduction, and some early planning is done. Handoff is followed usually by the onboarding. Most common activities during the onboarding phase are business orchestration and technical kickoff. The ultimate goal of

this phase is to map out actions required to achieve expected goals and ensure that the customer starts using the service. Moving forward to the next phase, the company strives to maximize the value that the customer derives from the service. To manage the customer journey effectively, the customer success team monitors adoption rates and responds to customer health alerts. When the time is right, results are reviewed to encourage account expansion. (Levin & Kooij 2018.) Upsells and renewals can be done either by the customer success team or by the sales team. Nature and frequency of customer success activities vary based on the type of the company. The model described herein is more suitable for companies which operate in the B2B sector because the people-intensive approach is very expensive. For comparison, companies operating in the B2C sector take advantage of technologies to streamline, automate, and scale customer success activates.

With a purpose to understand how customer success cycle works in the commissioning company, TalentAdore's team was engaged in mapping activities that take place throughout the customer lifecycle. A service design method called service blueprint was chosen to explore front stage, backstage, and support processes related to each customer action (Stickdorn & Schneider 2013). The service blueprint illustrated in figure 6 was created in May 2018. At that time, TalentAdore's customer base consisted of small and medium-sized companies operating in various types of industries. The creation of service blueprint served as the tool for facilitating a group discussion with the company's employees and allowed to construct a collective understanding of performed customer success activities at TalentAdore.

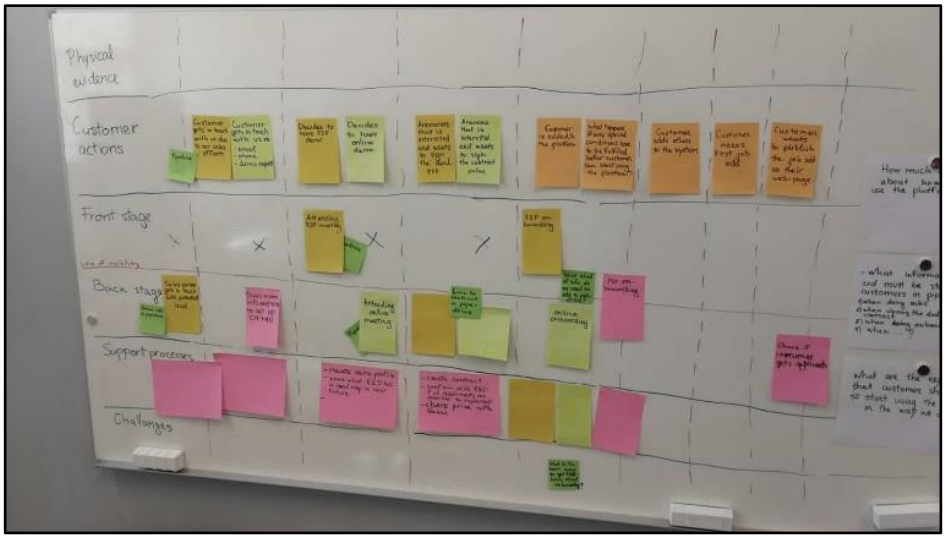


Figure 6. TalentAdore's service blueprint

From the service blueprint, it was discovered that the beginning of a customer success cycle is initiated by inbound and outbound sales efforts that bring potential customers to TalentAdore's attention. The first step is scheduling a face to face or online meeting for the product demonstration. If the potential customer is interested in proceeding further, then the process of sales negotiation continues for a couple of weeks. After closing a deal, a salesperson introduces the customer to a CS manager who then organizes an onboarding meeting. Internal handoff process is not defined. Before the meeting, the CS manager asks the customer for company-specific information that is necessary to configure the product's environment. During the onboarding, the CS manager introduces all Virtual Recruitment Assistant's functionalities. Typically, participants include a few main users and, sometimes, few hiring managers. The main contact person from the customer's side receives login information via email shortly after the onboarding meeting. The CS manager's task is to provide all necessary support and ensure that the customer makes meaningful progress. It is important that the customer takes following actions within a couple of weeks after the onboarding: adding other users, creating the first job ad, publishing it on the webpage, receiving applications. In case there are any delays, it is the CS manager's responsibility to identify the cause of it and provide assistance. Once the customer can be considered as onboarded, communication between the CS manager and users continue via built-in support channel in the product. The service design blueprint does not reflect what happens between the completion of the onboarding period and renewal as it is not clear to consulted employees. The customer success manager has been in the position for a too short period and has not dealt directly with any activities concerning renewals as those are handled by the company's CEO. The company does not sell any add-on features, therefore upsell activities are not mentioned in the blueprint.

To sum up, everything that has been covered so far, a brief overview is provided herein. SaaS evolution has largely contributed to the disruption of subscription-based companies. Being profitable in recurring revenue business require the ability to retain customers for a meaningful period. A new business function called customer success has emerged to ensure positive business outcomes in the form of renewals and upsells. Customer success cycle continues as long as the customer does not cancel the service. It is a customer success team's responsibility to coordinate customer success activities. Since TalentAdore serves B2B customers and provides many personal touchpoints, then examples of applicable customer success activities have been reviewed. In a B2C context, similar activities would be executed by making use of automation solely.

4 The 10 Laws of Customer Success

This chapter goes even further into exploring and identifying activities related to customer success. “The 10 Laws of Customer Success” are used for describing customer success processes at TalentAdore by using the zipper method. First, each law is briefly explained, then it is applied to commissioning company’s reality. All insights about TalentAdore’s operations are based on a group discussion, unstructured individual interviews with employees, and the author’s observations executed from June 2018 to August 2018. This assessment is crucial for defining existing and none-existing customer success processes.

4.1 Customer success should be a company-wide matter

The first law states that delivering customers success should be a top-down, cross-functional concern. Hence, every functional area within the company needs to know how it contributes to CS. “…building the right content in value-oriented context should drive the right behaviour - not only to acquire more customers, but also to set the agenda of your own people, especially as you hire and bring on new employees” (Bessemer Venture Partners 2015, 8).

Few suggestions that can help to develop customer success centric culture are listed below (Bessemer Venture Partners 2015, 4–5; Openview s.a., 43–52):

- Identify what success means to your customers and make sure that every department knows what it should do to support it.
- Define customer health and CS metrics, which reflect achieved results, review those together with the whole company at least once a month.
- Organize cross-functional sessions to process feedback and use shared knowledge for further product development.
- Involve none-customer facing teams in doing customer support and meeting customers from time to time.
- Treat CS as the “voice of customers”, make sure that it is considered when doing prioritization and evaluating trade-offs, including CS in the agenda of board meetings.
- Ensure that CS is considered as an equivalent to sales, and align titles of CS and sales leaders, introduce incentives which drive customer satisfaction and retention.
- Create a living document which states the company’s understanding of success and how every employee can help to deliver the desired value, make sure that this document is a part of every new employee onboarding.
- Celebrate success and share reasons for failure.

Although all TalentAdore employees shared an opinion that customer success is important when asked about it during interviewes, the understanding of what CS means in practice did not go beyond “making sure that customers are satisfied and happy”. There were no metrics in place to monitor value that customers get from the product. The only carefully tracked data points were new bookings and monthly recurring revenue. One

account manager and CEO performed new customer acquisition; sales processes often were supported by CEO, CMO, and CTO. Shared knowledge about customers was utilized in crucial discussions about product development by involving all employees. The relatively small size of the team made it easy to arrange necessary touchpoints. At the beginning of the project, one employee was holding the title Customer Success Manager. The employee had been a part of the company for four months. CS manager's responsibilities comprised customer onboarding, customer support, as well as tasks not directly linked to the role of CS: office management, invoicing, and general assistance to the CEO. Non-customer facing roles rarely were involved in meetings with customers, although the team leader of the research & development team constantly assisted with handling customer messages in the support channel. CS did not have a significant role in board meetings, but there was an intention to increase the attention and resources dedicated to it. There was barely any documentation concerning the subject, and even basic information about existing customers was scattered around various places.

4.2 The importance of selling to the right customers should not be underestimated

According to this law, the impact of selling to the right customers within the product-market fit is much bigger than simply avoiding churn itself. Resources invested in inappropriate customer acquisition, onboarding, and, once they face challenges, support is taken away from other customers with greater lifetime value. On the one hand, such customers can cause a potential threat of misleading product development efforts; on the other hand; they can help to expand the product application. Ideal customer profiles should be predefined and regularly reviewed to attract the right customers. Also, the perceived business value should be communicated through marketing efforts. Sales teams should carefully evaluate the intended context of product application and disqualify customers who are not aligned. Ideal customer profiles and product market fit are expected to evolve as the business grows. (Bessemer Venture Partners 2015, 6–8.)

Shortly after the author had joined TalentAdore, a company-wide session was organized with the purpose to introduce an updated company's roadmap. An ideal customer profile was presented during this session to emphasize the importance of establishing mutually successful cooperations. The team was advised to look for following components when acquiring new customers (Valkama 7 May 2018)

- recruitment is considered a strategic matter
- openness towards innovative recruitment practices
- job candidates are likely to be customers

- recruitment is a bottleneck for growth
- a high number of applicants and manual matching is difficult
- customer's company has dedicated employer branding or talent acquisition person.

4.3 The company should improve its ability to prevent churn continuously

Customers and service providers operate in the ever-changing business environment. Therefore, it is common for them to drift apart (Bessemer Venture Partners 2015, 9). As mentioned before, the long-term success of recurring revenue, growth, and valuation depend on the company's competence to maintain its customers and reduce churn. Here are a few of the most common reasons why customers churn (Bessemer Venture Partners 2015, 9–12)

- unrealized return on investment or business value
- very slow or significantly delayed the initial configuration of the product
- unmet expectations created during the sales process
- low rate of product adoption
- lack of product features and enhancements
- performance issues and poor product quality
- future absence of project sponsor or internal champion
- acquisition by another company that uses a different solution
- the shift of business strategy that leads to a re-examination of the product
- product is bought to solve the need that does not match products capabilities
- human factor that impacts the relationship with customers.

Data monitoring and proactive engagement with customers should initiate procedures that prevent the scenarios described above. Advance indication signs of potential future events and predefined action steps adjusted to the context of each instance can directly influence the outcome in favor of the service provider (Bessemer Venture Partners 2015, 12).

TalentAdore had experienced one recent churn case of the pilot customer by the time the author joined the team. Three additional customers decided to discontinue the subscription during the year. Reasons for churn were not under the direct impact of the TalentAdore. In one occasion, the management team of the international company rolled out decision to use another software across all countries. Other occasions were case examples of selling the product to bad fit customers - those companies decided to handle applications manually because of low recruitment volumes. Even though churn was not the driving force of this project, it was considered that a proper offboarding process would be beneficial for learning and ensuring customer advocacy.

4.4 The company should provide both software and expertise

Customers, especially in B2B sector, are seeking for more than well-functioning software, they want to work with people who will deliver expertise and make their choice worth the investment (Medina, Altschuler & Mark 2019, 181). All activities executed throughout the customer lifecycle to guide them towards achieving desired goals are crucial aspects of why customers may choose one service provider over another (Mehta & al. 2016, 92).

To drive desired business outcomes, it is advised to involve decision makers in defining success measures as they more likely know what metrics are relevant at the management level. Inputs from decision makers should be obtained early because their involvement gradually decreases during product implementation. Metrics which customers find relevant to evaluate the return on investment and key performance indicators irrespective of the product can help to steer customer journey. Providing early evidence of initial value is as important as guidance towards the ultimate goals. Thus, the solution provider should hold knowledge about good case practices and ways the product can address specific customer needs. Creating shared milestones and tracking progress in regular strategic business reviews can greatly contribute to successful collaboration. It is common to face situations where customers are not willing to invest time in mutual meetings if expectations have not been aligned since the beginning, or they feel that such touchpoints do not bring added value. Flaws in product or service quality, as well as unrealistic expectations set during sales, can lead to challenging situations which customer success function has to solve. If handled properly, such occasions can serve as a great opportunity to learn and strengthen the relationship between both parties. (Bessemer Venture Partners 2015, 13–17.)

This law can seem relatively vague at first, but it should not be underestimated. It highlights how customer success in any company, including TalentAdore, is tightly depended on the orchestration of everything that company does. Also, it emphasizes the significance of the company's know-how of its software and ability to facilitate customer's journey towards obtaining the maximum value out of it. There are countless ways of doing it.

This law prompted the author's thoughts on how TalentAdore should enhance the clarity of customer journey towards defined success milestones. On the one hand, TalentAdore demonstrated the expertise of its product and strived to create complementary value that goes beyond simply providing the software. On the other hand, a clear customer journey towards success was not mapped, making it impossible to track shared milestones. Also,

there was quite limited knowledge of very specific product used cases in customer companies. Despite the fact employee competency and knowledge is going to accelerate naturally as the company serves more customers, it may be useful to create a company-wide knowledge bank of various customer personas, good case practices, and used cases.

4.5 Customer health should be managed and monitored

Visibility to customer health is needed for predicting customer behaviour, optimizing the CS team's use of resources, and ensuring timely and relevant interactions. Quantitate, and qualitative health metrics can be derived from analyses of customer profiles in each customer segment. Every business has to formulate its health metrics, but here are examples of the most common components that could be used: time to the first value, overall usage of the product, depth of usage - % of the product used, support requests, product feedback, self-sufficiency, surveys results, marketing engagement and references, community involvement, discount level, invoice history, non-recurring revenue, contract growth, responsiveness, information obtained from customer meetings. It is demanding and time-consuming to identify healthy and unhealthy customer profiles manually, although it is useful for understanding data, testing various approaches, and refining the most suitable ones. Drawing conclusions from lots of spreadsheets, reports, and emails is inefficient and imolsive when done in the long term. Thus, technology has an essential role in enabling customer health monitoring and delivering actionable insights. (Bessemer Venture Partners 2015, 18–21.)

There was no tool which would indicate TalentAdore's customer health before the start of this project. It was possible to access notes from sales negotiations stored in customer relationship management software, contract information, support tickets, and verbal information from customer success manager, but there were no efforts dedicated to summarizing and analyzing all these data points.

4.6 Resources dedicated to customers should reflect their value

For a business to be feasible, SaaS vendors should create programs which reflect customer value and nurture customer loyalty. In many cases, loyalty cannot be built through personal relationships as expenses of such approach exceed customer value. Preferred type of customer interactions immensely depends on the product, whether the company operates in the B2B or B2C market, and the company size. Each company has to define a mix of high, low, and tech-touch interactions which ensure the right amount of

engagement to every customer segment. It is very common that one company has customer segments in each level of hierarchy illustrated in figure 7 below. (Bessemer Venture Partners 2015, 22–26.)

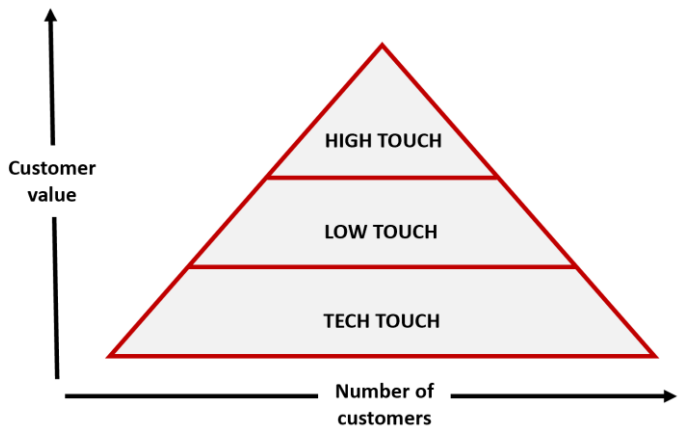


Figure 7. Touch model based on a hierarchy of customer value (adapted from Mehta & al. 2016)

The high-touch model is people-intensive and serves the most valuable customers, usually associated with high contract value. This model is deployed when working with enterprises which pay large amounts of money, although it can also be used with large and medium-size customers for well-justified reasons, especially in B2B business. The high-touch model involves a lot of personal interactions and scheduled touchpoints like on-site visits, custom, biannually, or quarterly executive business reviews. Unscheduled interactions typically take place when alerts of certain risks are noticed. (Mehta & al. 2016, 50–53.)

The low-touch model incorporates both the high touch and tech touch models. This model is utilized when working with important customers to which a reasonable number of one-on-one touchpoints should be devoted. Face to face interactions usually take place when they have large strategic importance for further success. At the same time, it contains elements of tech touch model and transforms the essence of previously mentioned activities, e.g., the onboarding process is standardized, handoffs are organized only from sales to onboarding, executive business reviews happen yearly, health checks are automated, and so is the renewal. The low-touch model is very suitable for a B2B business, but can also be used in a B2C business, which has a small target market and requires a very personal approach. (Mehta & al. 2016, 53–57.)

Tech-touch model is enabled by technology and delivers timely and relevant value to customers without any one-on-one touchpoints. This model is deployed when serving

huge amount of customers who have low individual value, but a large collective impact on the company's finances. While the tech-touch model is almost the only way how to handle large volumes of customers in a B2C business, reasons, why it is also widespread between B2B companies, should be explored. First, as the maturity of companies operating in the B2B sector increases, cost of sales and a barrier to entry lower, secondly, as they acquire higher value customers, segments of lower value customers are naturally being created. The tech-touch model focuses on automated interactions: emails, webinars, podcasts, online communities, and user groups, customer summits. (Mehta & al. 2016, 58–61.)

In this case, TalentAdore deployed the low-touch model to facilitate the customer journey. It was an optimal choice because the company did not serve enterprise level customers, which would provide enough resources to keep up people-intensive, high-touch programs. Similarly, the implementation of tech-touch model solely was not suitable due to the nature of B2B operations and undefined processes. It was at the company's core strategy to create strong relationships and organize personal touchpoints with customers when they are strategically relevant, meanwhile striving to automate repeating low-value workflows. Notwithstanding the intention to standardize and automate some of customer success activities, there was no foundation set to do it in reality.

4.7 Customer feedback should be obtained to meet customer needs

To ensure that the product meets customer expectations, the company should foster customer engagement and frequent feedback loops from all customer segments. Various means can be used to obtain the feedback from customers regardless if the high-touch or tech-touch model is being applied, e.g., surveys, live chats, in-app feedback forms, phone interviews, meetings with focus groups, or user communities. Customer feedback lays the foundation of product development, new initiatives, enhanced knowledgebase, better adoption, and strengthened customer loyalty. (Bessemer Venture Partners 2015, 25.) One way of cultivating systematic feedback is to have a team or person that deliberately focuses on customer experience and engagement. Establishing product advisory councils and communities of practice can be beneficial to drive continues improvement and define priorities in the product roadmap together with the customers. Dissemination of collected feedback between employees working in different functions is equally crucial as feedback can create impact only once acknowledged and analyzed. (Bessemer Venture Partners 2015, 27–32.)

One of the greatest challenges at the time for TalentAdore was to understand the extent to which customer feedback should be accommodated. Feedback was obtained from touchpoints with customers, support channel, and Net Promoter Score survey performed one time. It took large time resources from research & development team to help the customer success manager with processing all incoming customer feedback, especially from recently onboarded customers. The team was learning how to evaluate priorities in such a manner that only the most impactful matters are turned into product improvements. Flaws in the software were immediately acted upon, but feedback on less urgent matters was scattered around various channels. There was no defined process for collecting, storing, and classifying the obtained feedback. Absence of a product owner or team leader of the customer success team made it unclear who holds the competency to take the most optimal decisions. There was a clear intention to find ways of handling customer feedback more effectively, organize more feedback loops, and gather insights from customers in the development of new product features.

4.8 Time to value should be decreased to the minimum

Customers that have not obtained expected business value within the relevant period are less likely to renew; especially they have not done it by the time of renewal (Bessemer Venture Partners 2015, 33–34)**.** There is a huge risk of post-sales leading to customers falling into Trough of Disillusionment if the company does not deliver the initial value quickly or face issues with adoption (figure 8). The original excitement about potential value can be replaced by impatience, anxiety, disappointment, and frustration. The concept is developed by Gartner, global research and advisory firm in the USA that helps businesses around the World to make strategic decisions based on objective industry insights and expertise. Clearly defined phases with tangible proofs of value can facilitate customers' experience in such a way that creates exponential growth of perceived value and extended momentum (figure 8). The quickest path to value can be reached by starting with those items that take the least effort and can be achieved easily. Also, such an approach can be a beneficial tool to keep customer satisfaction at a high level when encountering unexpected difficulties or delays. (Fenn, Raskino & Burton 2013, 4.)

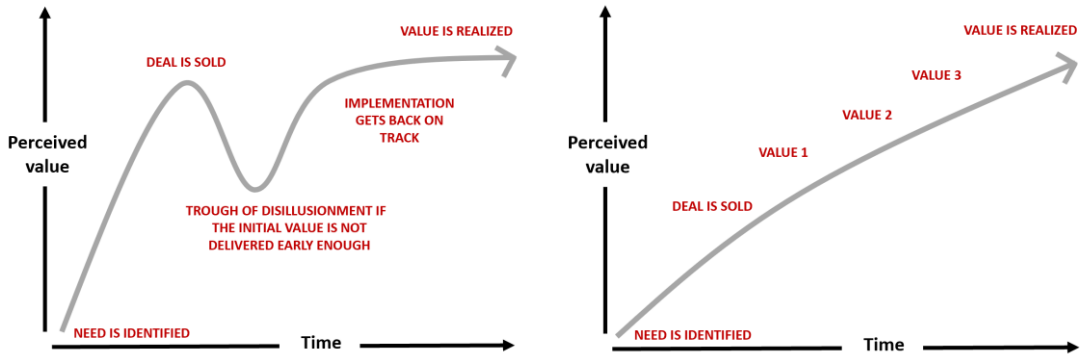


Figure 8. Delayed value delivery scenario versus phased value delivery scenario (adapted from Mehta & al. 2016)

While delivering the initial value of the product appears to be acute, it is also worth being reminded that customer success function must maximize the value gained from the product throughout customers lifecycle. Even highly satisfied customers should be challenged by showing them how to improve their efficiency, strive for better results, and take advantage of recent innovations. As business needs evolve, previously defined success metrics should be reviewed and validated regularly. (Bessemer Venture Partners 2015, 13–14.)

The configuration of the product and onboarding to TalentAdore's Virtual Recruitment Assistant was arranged shortly after the signing of the contract. It was challenging to measure the period from the closing of deal to the first value since concrete success metrics were not predefined. TalentAdore's customer success manager gave special attention to speeding up the process of publishing the first job ad. It was an essential prerequisite for making sure that the customer can start using other solution's functionalities. In some cases, delays were caused by actions required from customer's side, e.g., if the team in charge of customer's webpage was located in another country, then it took a relatively long time to implement necessary changes for publishing job ads. As a result, a question was raised: "How to convey required actions form the customer's side as early as possible?" Even though onboarding seemed to happen very quickly and effectively, it did not map out a clear path to full product adoption. This law initated the process of exploring bottlenecks and enhancements with regards to reducing the time to value.

4.9 Churn and retention should be measured thoroughly

Reasons behind new bookings, renewals, upsells, downgrades, and churn should be well understood. Moreover, their monetary impact must be measured. Calculating monthly recurring revenue only does not address the need for forecasting SaaS business performance because it does not account for churn and expansion. To predict the company's financial situation in the foreseeable future, a committed monthly recurring revenue is used. This metric subtracts the monetary value of all anticipated churn and downgrades from the monetary value of all guaranteed recurring revenue from existing customers, their account expansion, and new bookings. In case the company operates on an annual contract basis, then monthly recurring revenue is replaced by annual recurring revenue. Distinguishing different components of committed monthly recurring revenue early in advance helps to determine specific sources of positive and negative business outcomes. Similarly, it is beneficial for reporting if the reason of resignation can be chosen from the list in addition to the custom text field. Recording such details on top of high-level data concerning retention and churn allows the company to understand its business in a much greater manner. (Bessemer Venture Partners 2015, 38–39.)

Forecasting of committed monthly recurring revenue was done by TalenAdore's CEO. The way of calculating SaaS metrics was suitable for the current growth phase of the company, although it would need to evolve in the future when serving larger customer base and offering more options for upsells. Since the customer success team did not monitor TalentAdore's financial performance, then the employee understanding about how churn, downgrades, retention, account expansion, and new bookings contribute to business outcomes was limited.

4.10 Customer success function should be metrics driven

This law emphasizes the importance of measuring customer success function's performance. It suggests that teams which measure their processes are more likely to know how to improve and achieve greater results. While it is imperative for all teams to collaborate and have a sense of shared responsibility, it is also advised that one person is the final owner of certain metrics and customers. This logic follows the well-known saying: "If many people own something, no one owns it" (Mehta & al. 2016, 37).

When it comes to customer success metrics, they can be divided into three groups (Bessemer Venture Partners 2015, 43):

- customer behaviour

- activities of customer success managers
- business outcomes.

SaaS companies have the benefit of being able to monitor customer behaviour within their product. Notwithstanding the huge advantage of technologies, not all data points related to customer behaviour must come from the usage data. The greatest challenge of service providers is to interpret this data and speculate about derived business value. It is common to combine different elements of customer data into a more concise view of "customer health". (Mehta & al. 2016, 161.) When processes and individual responsibilities concerning customer success manager work are precisely outlined, it is possible to ensure standardized customer experience delivery and determine if customer success managers perform accordingly. What is more, a thorough data collection and measurement can provide insights into how activities of customer success managers influence customer sentiment, retention, and upsells. (Mehta & al. 2016, 162.) Finally, there should be clarity on how customer success function contributes to overall business outcomes. Following the CS team's progress towards achieving specific business outcomes can help to nurture the sense of clear focus and responsibility. Additionally, it can help to prove the return on investment of CS function. (Mehta & al. 2016, 163.)

As reiterated many times throughout this chapter, lack of established processes and monitoring were key drivers of this project. TalentAdore's CEO carefully followed business outcomes, but they were not tied to actions of the customer success manager. Since the company was experiencing exponential growth, the focus was on the onboarding and activating customers instead of retention. This was also related to the fact that contracts were made on an annual basis. Hence, it would take at least 12 months for recently onboarded customers to reach the renewal phase. There was too limited data for being able to evaluate how different customer success activities impact customer satisfaction and business outcomes.

Doing assessment based on "The 10 Laws of the Customer Success" raised the author's awareness about the present state of CS processes at TalentAdore and gave many ideas for possible advancements. After having discovered the context of business need and established the initial knowledge base, the author was ready to move forward with the task of consolidating gathered information.

5 Maturity of customer success processes

This chapter maps out the evolutionary phases of a maturity model that TalentAdore should undergo to progress towards the desired future state of processes. Consolidated assessment of CS process maturity at TalentAdore is presented before choosing focus areas of the product.

5.1 Customer experience maturity model

Different types of maturity models are used to assess the maturity of a wide range of subjects. Typically, maturity models present the assumption of how maturity evolves through various phases. Each phase is associated with specific characteristics that can be distinguished and evaluated. (Kohlegger, Ronald & Stefan 2009, 51.) For instance, the following features could be assessed to determine the maturity of CS processes: initial, repeatable, defined, managed, and optimizing (Herbsleb, Zubrow, Goldenson, Hayes & Paulk 1997, 32). These features are part of the universally used capability maturity model, originally introduced for assessing the process maturity of software suppliers (Kneuper 2009, 9).

When customer needs and expectations are placed in the center of attention, there is greater likelihood of delivering a meaningful customer experience (Miettinen & Koivisto 2009, 64). For this reason, the author has chosen to follow the customer experience, maturity model. Customer experience is the result of all interactions between the company and customer; it is a combination of company's actual performance and customer's emotional perception of it (Barnes & Kelleher 2015, 7; Hildebrand, Soudagar & Iyer 2012, 3). Similarly to the software capability model, which was mentioned before, this model also presents five explicit maturity levels. The rationale for each level is explained in the guide called "Building Your Customer Success Strategy", published by a venture firm that helps software companies to become market leaders (s.a, 17–18):

- Ad hoc (level 1). Customer experiences are unique and unpredictable. Process of facilitating customer journey is vaguely defined if at all; therefore, it is up to employees to decide what actions should be taken. All matters are treated of equal importance due to the lack of formal guidelines for evaluating priorities. Majority of actions are done in response to something that already has happened.
- Aware (level 2). Basic rules for delivering customer experiences and prioritization are implemented. Individuals are aware of factors associated with success and failure. There is a motive to make use of various metrics to gather a greater understanding of operational processes.
- Repeatable (level 3). Customer experiences are standardized and repeatable. Individuals know how to repeat the success achieved earlier. Every customer segment has a corresponding lifecycle and key performance indicators. The shift from reactive to

proactive approach happens by introducing such processes which prevent challenges before they arise.

- Predictable (level 4). Customer experiences are fully predictable and documented. Processes are well-integrated with every aspect of handling business operations. People from different functions work collaboratively to improve current ways of working, increase efficiency, and innovate based on carefully tracked data metrics.
- Activating advocates (level 5). Customer experiences lead to advocacy and referrals in a repeatable manner. There is a customer advocacy program in the place. Everyone in the company understands how customer success contributes to overall business outcomes, especially growth. Collaboration across different functions during various stages of the customer journey is common practice.

Defining where the company with regards of customer experience maturity can help to select suitable actions for further advancement. Moving to the next maturity level usually requires a notably large amount of efforts. Hence, it is beneficial to know where to direct the focus. (Openview s.a., 19.) Figure 9 indicates how each level of maturity correlates to people, processes, technology, and business strategy. This particular framework is created by senior subject matter expert Jackie Golden and complemented with insights from other professionals working with customer success. (Openview s.a., 16.)

MATURITY	LEVEL 1 AD HOC	LEVEL 2 AWARE	LEVEL 3 REPEATABLE	LEVEL 4 PREDICTABLE	LEVEL 5 ACTIVATING
People	Random, skills/experience mismatched	Basic organization structure Skills/experience defined	Process-centric customer experience focus	Business and customer outcome focused	Realize conection between customer oucomes and business outcomes Customer acquisition focus
Process	Ad hoc Exceptions are the rule Soccer ball drives activity Everything is a priority	Identify working and non-working elements Basic processes exist Integrated activities are limited Priorities established	Customer life cycle established Repeatable processes Metrics Established/ monitored Feedback loop established	Customer life cycle Stages working collaboratively Integrated customer center Innovative Customer Success	Collaboration across functions across all aspects of life cycle is normal practice Customer advocacy program in place
Technology	Basic tools, not right investments	Tools fit project or group, not integrated or collaborative	Tools/system integrated with collaboration and social capabilities Automation	Real-time, collaborative online customer knowledge/ community center	Customer advocacy tracking tool in place Customer success tracking tool in place
Business Strategy	Survival mode	Project focused	Standardized customer experience delivery	Predictable customer experience delivery	Leveraging customers to drive acquisition velocity

Figure 9. Five levels of customer experience maturity (adapted from Openview s.a.)

Customer experience maturity model is used as the framework for determining if CS maturity at TalentAdore is going to progress during the implementation of the project. The project is expected to create an impact across all four aspects described in this chapter (people, processes, technology, and business strategy), although created product will primarily target processes.

5.2 Initial assessment of customer success maturity at the case company

At the time of doing the assessment, customer experiences at TalentAdore were facilitated in “ad hoc” manner. The table below reflects the state of customer success in August 2018.

Table 2. Maturity of customer success processes at TalentAdore in August 2018

	Ad hoc Level 1	**Aware** Level 2	**Repeatable** Level 3	**Predictable** Level 4	**Activating** Level 5
People	X				
Processes	X				
Technology	X				
Business strategy	X				

Customer success team consisted of two members – junior customer success manager who had started in January 2018 and thesis author who had started to work as trainee in May 2018. Both employees were recruited without being matched with the skills and competencies required for customer success function. Considering that they did not have long-term experience with TalentAdore’s business model, regular assistance was needed from the company’s CEO. There was a clear intention to establish basic rules for evaluating priorities, but no suitable process guidelines had been created so far. Due to the ad hoc nature of customer success activities, it was challenging to recognize patterns which could be standardized and applied to a wide range of customers. The structure of onboarding meeting was predefined, but it was not clear how the customer experience should be managed before and after the meeting. Processing customer feedback from onboarding meeting took large time resources, especially because the scope of possible product customization was not communicated clearly. Giving high importance to customer satisfaction, TalentAdore’s team addressed a lot of customer requests that lead to slowing down development efforts dedicated to the company’s roadmap. Project’s author had started to explore some suitable software technologies for making CS processes more scalable, but the company was not ready to allocate necessary resources. Various workarounds were created in such platforms as Trello, Pipedrive, Google Sheets, Box, and Google Docs. Information about customers was scattered around various places, making it time-consuming and challenging to keep up to date. Deficiency of established processes and customer success strategy had made CS function to be predominantly reactive. Based on this evaluation, the project’s author concluded that customer experience maturity in TalentAdore corresponds to level 1.

6 Tools for increasing maturity of customer success processes

This chapter brings the project to the end of the “Define” phase and the beginning of the “Develop” phase in the project’s lifecycle. First, it is explained how it was decided to concentrate on specific customer success tools; then, each tool is introduced. Sections addressing tools include the following information: a brief about existing reality concerning the processes that the specific tool attempts to address, expected benefits, a description of the creation process, evaluation of applicability, and suggestions for further development. Maturity of customer success processes at TalentAdore is assessed once more at the end of the chapter to indentify it the thesis objective has been reached.

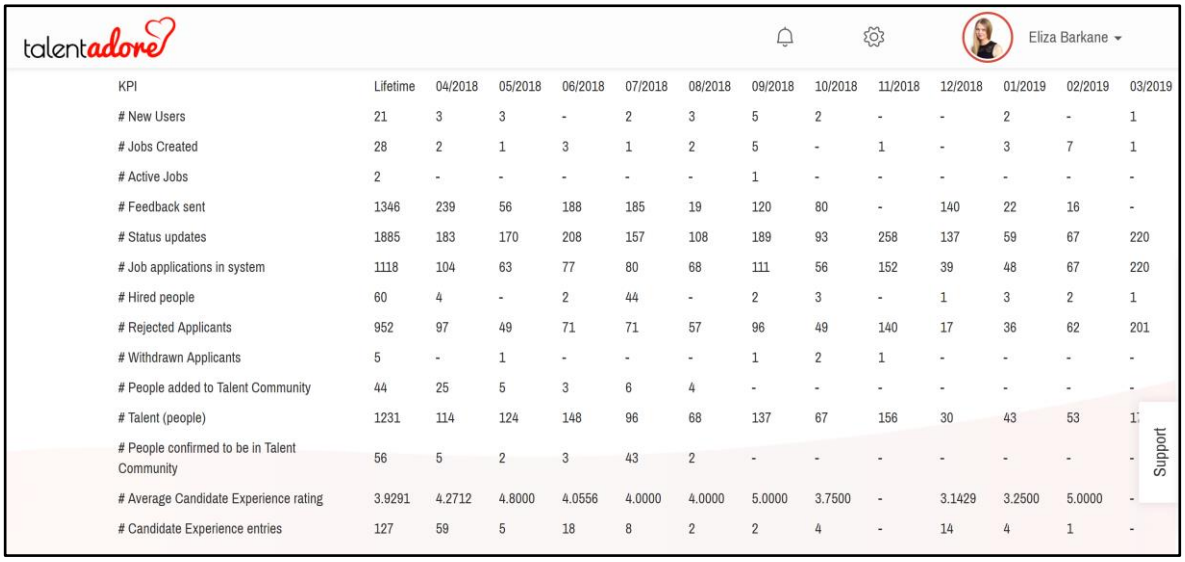
6.1 Identifying areas of focus

Many ideas were gathered during the discovery stage of the project. Therefore, it was necessary to do prioritization. The decision to focus on certain product type was important for limiting the scope and setting ambitions that can be achieved within the given project timeline. The author proposed to concentrate on tools that would impact customer success processes as it seemed to be one of the most crucial elements for enabling better customer experiences. According to Ould (2005, 4), “Processes are activities performed collaboratively by people with purpose to achieve specific outcomes”.

Given that TalentAdore already had human resources dedicated to customer success, the next step was to provide them with suitable tools. Combination of TalentAdore’s employee expertise and generated tools was anticipated to drive context-based interactions and increased value. It was relatively easy to choose which tools should be implemented based on the on observed business needs and available resources. Four customer success tools were developed gradually from August 2018 to April 2019. Several complementary materials were created to support the process of product development. It was decided to mention and attach some of these materials as appendixes. Despite their relevance, it was out of the scope to provide more comprehensive reasoning for why certain items were created in the chosen manner. Creation of tools was extensively relying on the author’s observations and knowledge gathered during the first four months of the traineeship.

6.2 Dashboard for monitoring usage data

After gathering the initial understanding of customer success and creating the service blueprint in May 2018, the author had identified the need for increased transparency of customer usage data. The aim was to define various key performance indicators that would show the extent to which each customer obtains value from TalentAdore's product. It was proposed to create a live dashboard containing customer lifetime and monthly data metrics (appendix 1). The idea did not get immediate support as some of the team members were concerned if anyone will take time to review this information manually. It took a couple of months to convince others that the tool would be of use as summer vacation time slowed down the company's operations. Finally, in August 2018, the author sent a revised proposal reemphasizing the business need (appendix 2) and got permission to use resources for the implementation of the dashboard. After selecting relevant data points, the research & development team assisted with actual development work. The final deliverable did not have a well-optimized user interface, but that did not hinder the customer success team from making use of it (figure 10).



KPI	Lifetime	04/2018	05/2018	06/2018	07/2018	08/2018	09/2018	10/2018	11/2018	12/2018	01/2019	02/2019	03/2019
# New Users	21	3	3	-	2	3	5	2	-	-	2	-	1
# Jobs Created	28	2	1	3	1	2	5	-	1	-	3	7	1
# Active Jobs	2	-	-	-	-	-	1	-	-	-	-	-	-
# Feedback sent	1346	239	56	188	185	19	120	80	-	140	22	16	-
# Status updates	1885	183	170	208	157	108	189	93	258	137	59	67	220
# Job applications in system	1118	104	63	77	80	68	111	56	152	39	48	67	220
# Hired people	60	4	-	2	44	-	2	3	-	1	3	2	1
# Rejected Applicants	952	97	49	71	71	57	96	49	140	17	36	62	201
# Withdrawn Applicants	5	-	1	-	-	-	1	2	1	-	-	-	-
# People added to Talent Community	44	25	5	3	6	4	-	-	-	-	-	-	-
# Talent (people)	1231	114	124	148	96	68	137	67	156	30	43	53	1
# People confirmed to be in Talent Community	56	5	2	3	43	2	-	-	-	-	-	-	-
# Average Candidate Experience rating	3.9291	4.2712	4.8000	4.0556	4.0000	4.0000	5.0000	3.7500	-	3.1429	3.2500	5.0000	-
# Candidate Experience entries	127	59	5	18	8	2	2	4	-	14	4	1	-

Figure 10. Dashboard for monitoring customer usage data created by the author

The tool was delivered at the end of August 2018 and provided access to metrics that had been hidden so far. TalentAdore's customer success manager right away acknowledged the relevance of the dashboard; nevertheless, it took a great while to make it a part of daily routines. The dashboard turned out to be handy for monitoring customer adoption, identifying if customers use certain features, and initiating context-based conversations. The number of various used cases accelerated with time. For instance, upsells and renewal cases used to be handled by the company's CEO without access to the extensive information about customer usage data. In spring 2019, the customer success team

started to take ownership of these processes by making use of the dashboard. Customers who seemed to get much value or had exceeded conditions of the original cooperation agreement could be introduced to the next product package. This also allowed making custom offers for those customers who had not realized the value and prevent their resignation.

Even though the dashboard became integrated into TalentAdore's operations very successfully, manual monitoring consumed a lot of time. It was easy to explore information about one customer at the time, but it was not possible to draw quick conclusions about the whole customer base. Moreover, key performance indicators were predefined, making it impossible to explore different angles of customer usage data. After the implementation of the dashboard, the author recommended investigating the possible acquisition of customer success software. Such software was considered to be useful for analyzing rich data, evaluating priorities, designing customer journeys, and automating certain workflows (Medina, Altschuler & Mark 2019, 7). The author proposed customer success tool called Planhat in September 2018. TalentAdore's CEO started negotiations with a solution provider, but the service subscription fee turned out to be higher than what the company was willing to invest. Without further iteration rounds, the dashboard got actively deployed in the company's operations. It could have been possible to advance the dashboard, but the author believed that it is not worth the efforts considering large manual work required to interpret the data. It was recommended to use this solution until suitable software would be replacing existing data monitoring practices.

6.3 Visualization of the customer lifecycle

The first step concerning the creation of the customer lifecycle was taken before reaching the product development phase in the project's lifecycle. When the author started working in TalentAdore, newly onboarded customers were allocated to a separate pipeline in the company's customer relationship management program called Pipedrive. The way this pipeline was designed did not convey useful information about customer lifecycle. At the end of May 2018, the author revised pipeline to help the customer success manager proactively follow actions that are crucial for further product adoption. This solution figure 11) was not completely suitable for customer success needs, but it provided satisfactory visualization and the ability to assign different tasks.

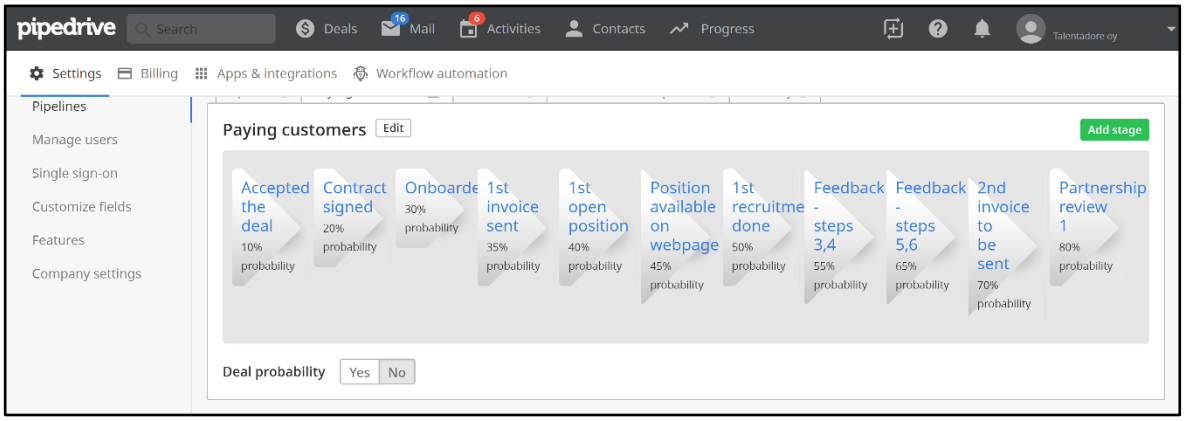


Figure 11. Visualization of customers success lifecycle in Pipedrive (Pipedrive 2019)

To ensure a customer-centric approach, it was decided to bring in the customer perspective. Thirteen customer meetings were organized from August 2018 to January 2019 (appendices 3 and 4). The project author created an illustration of the customer lifecycle (figure 12) and used it to facilitate semi-structured interviews with customers.

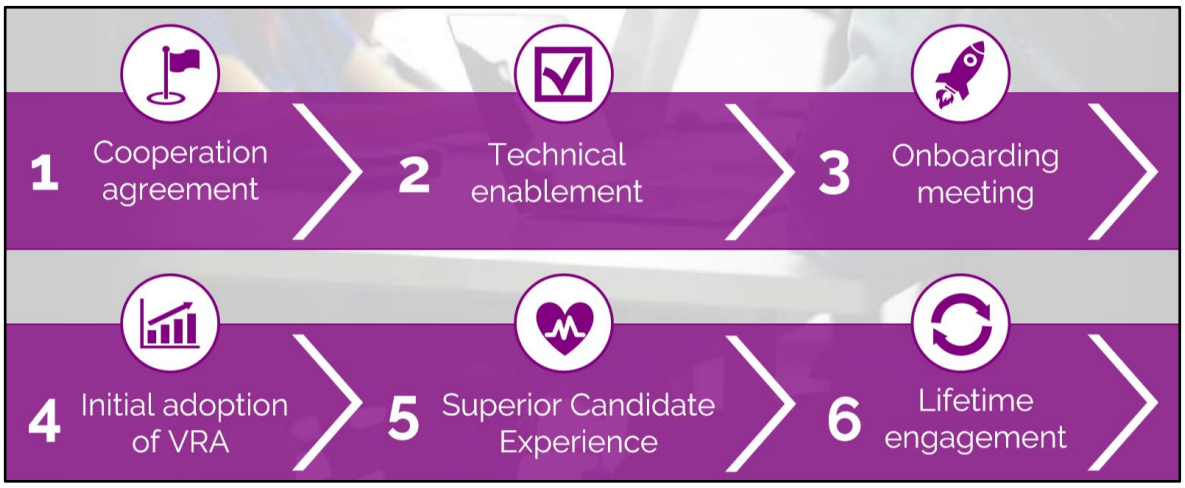


Figure 12. Visualization of customer success lifecycle

The customer lifecycle was continuously enhanced as the author learned that some of the stages did not resonate with customers and could not be easily understood. Gradually, descriptions of each customer lifecycle stage evolved (appendix 5). Touchpoints with customers helped to gain a deep understanding of user experience and challenges that stood in the way of them deriving the maximum value from the product. Moreover, it gave an excellent opportunity to hear customer thoughts on different subject matters relevant at that specific period, e.g., new features, further enhancement of onboarding, good case practices. Acknowledging the importance of delivering value to customers, the author always allocated space on the agenda for answering questions and demonstrating the latest updates.

There was an intention to describe what support activities are required from TalentAdore's teams in each stage of the customer lifecycle. A draft of process guidelines was created, but the author left it unfinished in November 2018. Considering many ad hoc processes and nature of a startup company, it was very challenging to generate a detailed process description that would be enough applicable to every new customer case. It was recommended to collect data from a longer period and then create process descriptions corresponding to different customer lifecycle stages and, if necessary, segments.

To sum up, customer lifecycle was supposed to serve as the tool for understanding what should happen during each stage of the lifecycle. Revising internal customer lifecycle increased CS team's ability to direct customers towards desired actions in the relevant period. Distinction of six lifecycle stages contributed to facilitating conversations. It helped customers to create a retrospective and focus on certain experiences that took place within each stage. The development process of the tool led to new insights, although created visualization for external use was not taken into daily use.

Meetings revealed that employees who do not work in recruitment daily are less likely to get value from TalentAdore's product. For example, hiring managers did not have a high motivation to explore the solution right after onboarding unless there was an actual need to recruit someone. In many cases, customers decided to organize training only for the main users without involving hiring managers at all. This lead to the creation of hiring manager guide (appendix 6), which describes how to start using the product when time is right for a particular individual. Meetings made it evident that customers are not well aware of latest features updates despite the fact they get newsletters. Thus, the author started to explore ideas for increasing new feature adoption. A page (appendix 7) compromising information about the latest product updates was created in TalentAdore's software as a side initiative of this project. Customer onboarding was repeatedly suggested as one of the areas which would require more attention. Few customers expressed that they would appreciate the project management approach to be aware of when and what is supposed to happen after signing the contract. Notwithstanding feedback regarding some CS processes that could be raised to even higher standards, all consulted customers seemed to be very pleased with the collaboration.

Following these and other insights, it was decided in November 2018 to reconsider the acquisition of customer success software. Also, a head of customer success was hired as a result of a rapidly growing customer base. This was a very significant sign of customer success, becoming a company-wide matter. It was the author's responsibility to present

various software solutions and drive the process of sales negotiations. Previously presented CS software called Planhat again stood out from all options assessed and was considered as the best fit based on TalentAdore's requirements. Lifecycle illustrated in figure 13 was created in January 2019 when the solution was taken into use.

Figure 13. Visualization of the customer lifecycle in Planhat (Planhat 2019)

Further development of customer lifecycle was put on hold at this time as the focus shifted towards figuring out what happens during the onboarding stage. In the future, it would be good to revaluate if this is the most optimal way of organizing customer lifecycle and make it clearer when a particular customer can be moved from one lifecycle stage to another one.

6.4 Onboarding playbook

As described earlier, there existed a documented flow for onboarding training, but it was not specified what customer success activities take place before or after that. Handover of all relevant information from the sales responsible to the customer success team usually happened in an impromptu manner. In a company-wide meeting held, it was decided to create a post-sales handover form (appendix 8) which would incorporate the main information about the sales deals. Unfortunately, these forms were left incomplete very often. This led to a few occasions when the research & development team was not informed about the required development work promptly. Depending on customer's availability, then onboarding meeting was organized within a couple of days or weeks ensuring as short time to value as possible. A list of information necessary from the customer was created (appendix 9) with a purpose to speed up product adoption and prepare for the onboarding meeting. During the meeting, the main users were briefed about all settings and actions that can be performed from the Virtual Recruitment Assistant. It was not a surprise for the author when few customers told that the training was useful but overwhelming. Consulted customers expected to be advised where to get started after the onboarding training as it had covered an extensive amount of information.

In August 2018, the author decided to create an onboarding follow-up material (appendix 10) that could be sent to customers after onboarding meetings. This material compromised checklists of actions, as illustrated in figure 14. Corresponding guides were added to the checklists for in-depth guidance.

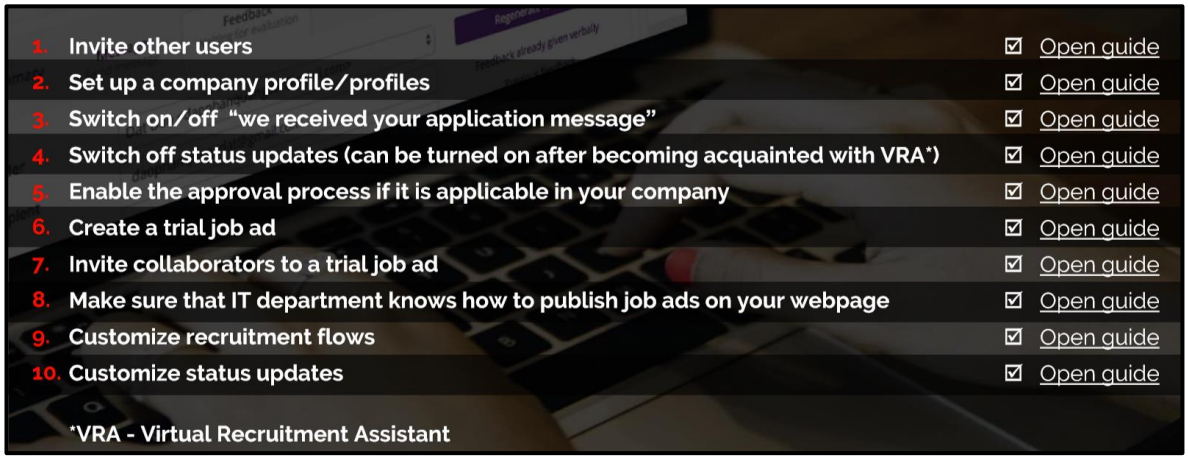


Figure 14. Checklist from onboarding follow up

This was believed to be an important milestone considering that no one else had tried to map out specific steps to be taken after onboarding. Unfortunately, reality proved that created checklists do not enhance customer onboarding as greatly as expected. Based on feedback from four customers, consolidated onboarding checklist was introduced in September 2018 (figure 15).

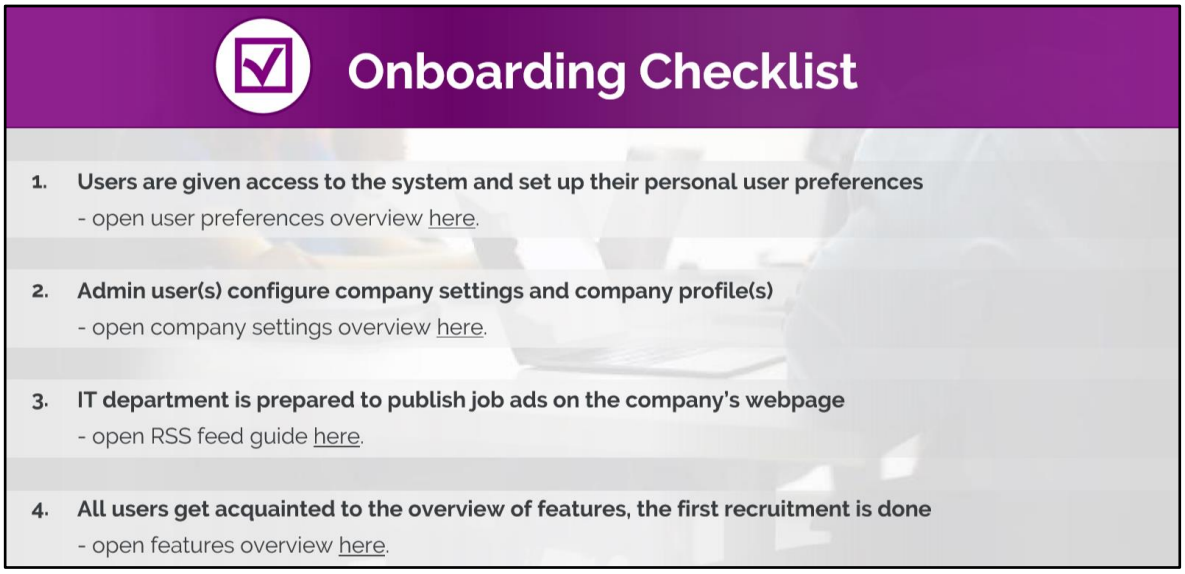


Figure 15. Checklist for onboarding follow-up material

In comparison to the previous onboarding follow-up material, this one (appendix 11) was much shorter, less detailed, and focused on what seems to be the most crucial for further

adoption. It was very challenging to observe the onboarding process because it happened in the language that the author did not speak. After a few attempts to make checklists a part of the company's everyday practices, they were revoked. Static nature of documents had many disadvantages, e.g., they did not allow modifications, tracking, or collaboration. It was decided to keep looking for alternative enhancements that would address onboarding needs.

Finally, in January 2019 a suitable tool was available to the customer success team. Acquired customer success software Planhat included playbook feature. This feature allowed to design customer journey templates that could be applied to the customer in various lifecycle stages. Visually playbooks looked like step by step checklists. With the help of the customer success team, the author created a playbook (figure 16) that compromised key activities which should take place starting from the onboarding kick-off call until the competition of onboarding.

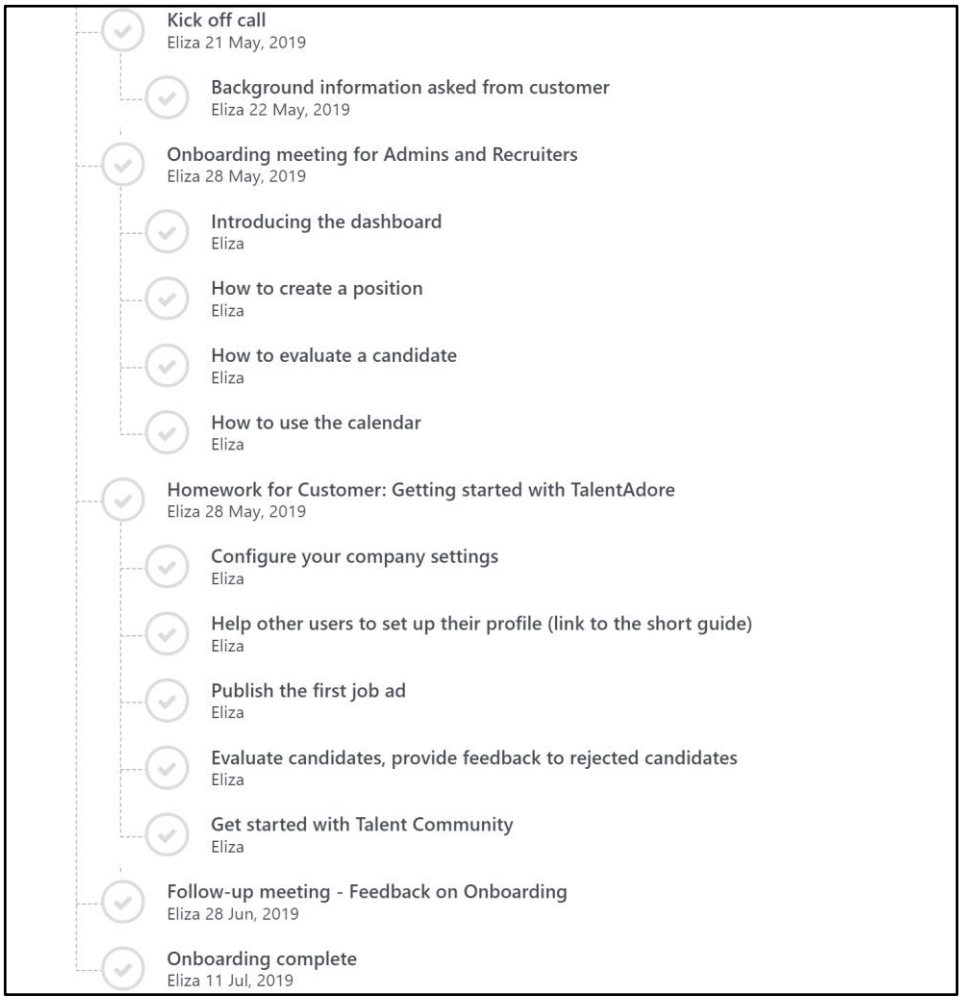


Figure 16. Onboarding playbook (Planhat 2019b)

Introducing onboarding playbooks in February 2019 made the onboarding process transparent not only for TalentAdore's team but also for customer's representatives. It was easy to oversee progress as items on the list could be modified and checked off by any of collaborators. It was possible to add complementary comments, attachments, and checklists to any of the activities in the list. Each activity had an explicit owner from the customer success team and due date. Even when activity type indicated action required form the customer side, the responsible person from the customer success team proactively followed that it happens promptly. The tool was well received and quickly evolved based on learnings obtained. The onboarding playbook was very useful for making it clear when the onboarding period is over. As the company provided people intensive support during the onboarding period and did not have resources to maintain the same level of engagement throughout customer lifetime, it was very important.

With regards to future development, it would be needed to make several onboarding playbooks for all customer lifecycle stages. In addition, playbooks could be diversified within each stage to address various customer segments. It should be one of the customer success team's priorities. The potential of using simple, only internally visible playbooks for handling renewals and upsells could be explored. This would be handy for guiding employee actions and receiving automatic task reminders. It is not yet recommended to connect playbooks with automatic emails and triggers as long as CS processes have not become more standardized.

6.5 Customer health card

Customer health card was made and filled in October 2018 to understand where to allocate the customer success team's resources. The health card (table 3) compromised the basic information about customers, highlights from usage data, and some engagement indications. The green color was used to indicate good customer health, the yellow color was used when some data points looked alarming, and the red color was used for very concerning cases. The assessment concerning adoption, activity, and use of a feature called Talent Community was done intuitively by interpreting available data from the dashboard developed earlier.

Table 3. Customer health card

Basic info						Usage data										Engagement				Next steps	
Customer name	Owner	Webpage	Ad on web	Renewal	Contract value	Adoption	Activity	Use of TC	Active jobs	Talent	Applications	#entries	CandX rating	Added to TC	Confirmed TC	Last touch	Features Oct	Features Sept	Features Aug	Actions	Comments
Customer 1	Name	Link	No	Date	Low				1	1	4	0	0	0	0					Actio	Comr
Customer 2	Name	Link	Yes	Date	High				327	287	1134	8	4.87	239	127					Actio	Comr
Customer 3	Name	Link	Yes	Date	Medium				8	3	42	2	4	0	0					Actio	Comr
Customer 4	Name	Link	Yes	Date	High				32	127	696	43	4.16	111	62					Actio	Comr
Customer 5	Name	Link	Yes	Date	Medium				18	10	411	27	3.59	20	13	?				Actio	Comr

To provide an example, a customer's number 3 health is described herein. Based on data, the customer has not yet conducted one full recruitment and used the main features, that is why a yellow health indicator is used. Frequent activity is recorded. Hence, the activity field is marked green. There have been no attempts to use Talent Community, so the corresponding field is marked red. All engagement fields are green because the customer was in touch with TalentAdore not too long time ago, and more than half of the company's users have opened newsletters containing information about new features.

It was decided not to reiterate the process of creating a health card every month because it took too much time. Regardless of that, the created health card revealed a lot of new insights. The creation process itself was meaningful as it raised the customer success team's awareness and provided an overview of the whole customer base. In January 2019, the author was asked to create one more health card and consolidate all findings in an appealing presentation that was shown to the company's board.

Bottolenecks of using manual approach for customer success processes, including evaluation of customer health, had become evident and well understood by the majority of the TalentAdore's stakeholders. In January 2019, the author started to work on entering all customer data into Planhat. The company's accelerating growth prevented allocation of resources for usage data import, that is why by April 2019 there were still not enough data points to derive customer health. Once it is accomplished, the next step should be configuring the formula of customer health criteria to get live customer health scores and triggers when outliers are detected.

6.6 Repeated assessment of customer success maturity at the case company

In this section, the framework of customer experience maturity model is used again for describing the state of customer success function at TalentAdore in May 2019. Although

not all changes concerning customer success maturity resulted from this project directly, it greatly contributed to many of them. The project raised the awareness about the relevance of customer success, identified existing and non-existing CS elements, and initiated the transformation. Based on the author's evaluation (table 4), the maturity of customer success at TalentAdore correlated to level 2, in some cases moving towards level 3.

Table 4. Maturity of customer success processes at TalentAdore in May 2019

	Ad hoc Level 1	**Aware** Level 2	**Repeatable** Level 3	**Predictable** Level 4	**Activating** Level 5
People		X			
Processes		X →			
Technology		X →			
Business strategy		X			

In May 2019, the CS team consisted of three employees who were recruited explicitly for the work in the customer success function. Each employee, including the project author, had clearly defined responsibilities that contributed to the customer success team's goals (appendix 12). Also, two trainees assisted with some matters related to customer success, sales, and marketing. The head of CS coordinated the work of the customer success team and the research & development team. Having an extensive understanding of both - customer needs and the company's roadmap, it seemed that the head of customer success was able to do more effective resource allocation than it used to be done one year ago.

Inputs from customer interactions and new sales commitments were reviewed every week during the internal meeting of the customer success team. The new approach positively affected the research & development team as they could focus on their core work instead of prioritization. Inputs from customers were divided into four categories. Bugs and serious flaws got immediate attention and were addressed as fast as possible. Relevant development suggestions were marked down under specific subject matters for being used when the time is right. Suggestions that did not go along the company's roadmap in the foreseeable future were noted, but it was communicated to customers that they are unlikely to be developed. The fourth category included customer-specific customization requests that were feasible if the customer was ready to cover the implementation costs. Overall the prioritization seemed to work much better than before.

Trial and error approach had helped to establish basic customer success processes, but they still had to be streamlined and tested in real life situations. There were continuous improvements done on weekly basis by recognizing working and non-existing elements. The customer lifecycle was defined, although it still required a lot of further thinking about what should happen in each stage of the lifecycle. The created dashboard for monitoring usage data had introduced some key performance metrics that the customer success team followed, but it was not an optimal solution for addressing long-term business needs. Playbook templates made the onboarding process more repeatable, although it was evolving as rapidly as TalentAdore's customer base. There were many feedback loops organized throughout the year, but there was no systematic approach for collecting and distributing the feedback. The customer success team had become aware of how important it is to assess customer health, be proactive, and make sure that customers obtain desired value. The next step was to translate this awareness into meaningful actions.

Acquisition of the customer success software Planhat was expected to help building customer success function's capacity and scalability. It took a few months to enter basic data about all existing customers before the customer success team could start getting value out of the tool, but once it was done - the impact was felt immediately. Ability to access all relevant information about any of customers from one place saved tame and increased efficiency. Moreover, it allowed seeing past communication and activities involving any of the users. Every employee was granted access to the solution, although it no one used it as frequently as the customer success team. With a purpose to increase company-wide transparency about customer success activities, an integration from Planhat to team's messaging platform called Slack was made at the beginning of May 2019. Updates were posted automatically in the form of short messages, so anyone interested could go and discover further details. The software held much-undiscovered potential and was a very important asset of the business strategy. Although TalentAdore had not developed the capacity to provide standardized and predictable customer experiences, it had moved away from the initial survival mode.

7 Discussion

The discussion compromises information about the relevance of the project plan, evaluation of product applicability, use of selected methods, collaboration with the commissioning company, as well as recommendations. In the end, the author's assessment of learning and professional development is presented.

7.1 Summary and conclusion

The objective to develop tools for increasing the maturity level of customer success processes at TalentAdore was met according to assessment based on the customer experience maturity model. Maturity of customer success processes advanced from level 1 to level 2 during the project implementation. This was not a consequence of the author's efforts entirely as the company experienced rapid growth, and new employees brought in additional expertise. Nevertheless, many changes were initiated by the author, and progress made would not be as significant without efforts dedicated throughout the year (Valkama 2019).

The chosen Double Diamond model had established a suitable framework for creating a project plan. During the "Discover" phase from May 2018 to August 2018, the author explored the business context and reviewed literature concerning customer success. It was challenging to understand where to get started. Thus, defining existing and none existing customer success processes based on "The 10 Laws of Customer Succes" was very beneficial. Having identified the current state of customer success maturity at TalentAdore by September 2018, the author was ready to move from the "Define" to "Develop" phase. Originally it was planned to complete "Develop" phase in a shorter period, but the author had underestimated the complexity of facilitating change in a real business environment. Driven by the motivation to ensure that developed products can be used in the company's day to day operations, several iteration rounds of creating products and support materials took place. The first of the tools moved to "Deliver" phase in August 2018 while the last one reached it in February 2019. Applicability of delivered tools was evaluated from the time of delivery until May 2019. There was an intention to advance delivered tools even further, but for that to happen, the author had to set up recently adopted customer success software called Planhat. Figuring out how to curate customer success process in Planhat was one of the author's main focus areas during spring 2019. However, it was not described herein as it was not in the scope of the project.

The following tools were developed: dashboard for monitoring usage data, visualization of the customer lifecycle, onboarding playbook, and customer health card. It was fairly easy to evaluate product applicability by seeing if they become applied to TalentAdore's operations or not. Furthermore frequency of tool usage was estimated. Since all tools were related to customer success processes, their maturity level was assessed. Table 5 provides an overview of developed tool applicability.

Table 5. Product applicability

Criteria	Dashboard	Customer lifecycle	Onboarding playbook	Customer health card
Did the tool become a part of TalentAdore's operations?	Yes	Yes	Yes	No
How frequently was the tool used?	Few times a week	Few times a week	Few times a week	A couple of times in total
Which maturity level did it reach based on the author's observations?	Level 3 (Repeatable)	Level 3 (Repeatable)	Level 3 (Repeatable)	Level 2 (Aware)

As defined in the thesis scope, there was no intention to estimate the extent to which produced tools could apply to other organizations than the commissioning company. Nevertheless, the author's unique contribution to the knowledge about customer success should be recognized. Accumulated wisdom during the product creation process can be transferred and deployed in other SaaS companies which use a subscription-based business model. The project's plan and framework can be used by other individuals who are trying to establish the foundation of customer success process in B2B startup companies.

While developing customer success tools, the author followed service design principles by taking into consideration the needs of all stakeholders directly impacted by CS processes at TalentAdore. Tools were developed collaboratively by working together with TalentAdore's employees and customers. The simple and iterative approach allowed to process a large number of ideas very rapidly. Testing was done in the company's business setting, ensuring immediate feedback loops and elimination of unsuitable prototypes that did not address the need. Several intangible aspects of customer success activities were turned into physical visualizations.

With regards to the literature review, gathering secondary data was imperative for the author's initial knowledge about the concept of customer success. First, it seemed that there is very limited amount of reliable information concerning the topic, but then a lot of

useful materials were found. The author collected and became acquainted with a much greater number of resources than sited in the work. It was especially important for ensuring that the chosen reference point for identifying existing and none-existing customer success processes (“The 10 Laws of Customer Success”) adequately represents what is widely known about the studied phenomena.

The chosen quantitative approach supported the need to build in-depth understanding of the context within which the project was implemented. Considering that the author had no prior expertise related to customer success and the commissioning company’s operations, unstructured observation approach was adopted. The author spent an extensive amount of time in the observed environment to discover unwritten rules, processes, and habits of people. Moreover, the ability to address necessary questions with any of the stakeholders promptly and within the real business setting was crucial for ensuring the reliability of produced results. Massive volumes of data gathered during observation, chat conversations, and interviews made it difficult to record, summarise, and classify this information. More detailed and reliable retrospective analyses of the project implementation could be compiled if there was a written overview generated after the completion of every project step. All interviews with employees were unstructured with a purpose to obtain situation-specific data and make full use of the interviewed person’s knowledge. Although interviewees were not limited by being able to answer only preformulated questions, the objective of the interview was presented to direct the conversations towards topics that were relevant to the investigated matter. The credibility of the project’s results could be increased even further if employees were asked to evaluate the maturity of customer success processes based on predefined criteria at the beginning and the end of the project. Unfortunately, the inconsistency of unstructured interviews did not allow to capture comparable data, so the evaluation was based on the author’s observations and the customer experience maturity model. Semi-structured interviews were conducted to obtain insights from customers related to their experience with TalentAdore and development of customer success tools. This interview type was chosen to make the most out of limited time and focus on certain insights necessary for product advancement.

The project implementation helped to raise awareness about customer success being a company-wide matter and initiate transformation. Recommendations for further development of customer success maturity at TalentAdore were delivered complimentary to suggestions concerning tools in chapter 6. The company should focus on building a culture of self-managed teams to ensure that individuals are encouraged to review and improve existing working practices as often as necessary. In a nutshell, standardized CS

processes are as important as the CS team's talent capacity to enhance them. Having experienced the impact that can be made by adopting suitable customer success software, the author recommends dedicating a significant amount of time for exploring its functionalities. The next big step is to connect Planhat with live usage data from TalentAdore to derive rich information about customer behaviour. Also, usage data is one of the most crucial components missing for setting up the formula that will estimate customer health. Increased capacity and experience of the customer success team should be used for learning how to handle renewals and upsells, taking this responsibility away from CEO. Moreover, the software offers the possibility to create email templates and automating certain workflows, but these functionalities can only be used when various playbooks are predefined. The customer success team is on a good path to proactively monitoring customer health, effectively allocating limited resources, and driving desired business outcomes through context-based engagements. To accelerate the CS team's performance and take into consideration customer perspective, a systematic way of collecting customer feedback through physical touch-points and surveys should be developed further.

Collaboration with the commissioning party worked out very well. The company required that the author commits to full-time employment to get access to all necessary resources for delivering applicable results. Apart from the project implementation, the author was asked to generate constant improvements (many of which were not described in this work) and contribute to the customer success team's responsibilities. Although TalentAdore's employees revealed already identified performance gaps and areas of possible improvement, a high degree of autonomy made it challenging to identify priorities and get started at first. There was full trust placed into the author's competency to conduct the project, engage stakeholders, and drive transformation. The company's culture promoted learning by doing, making it a surprisingly safe space for someone with very limited expertise. The majority of the author's ideas were supported, leaving it to the actual trials to make it self-evident if the delivered suggestion should be disregarded or enhanced further. The thesis author was recruited as a full-time employee in May 2019 to continue increasing maturity of customer success processes.

The project's results were disseminated by giving a presentation to Haaga-Helia's students and providing weekly updates in TalentAdore's DEMO meetings, there was a plan to create a short business report for other TalentAdore's stakeholders, but it was not completed before the submission of this work.

7.2 Evaluation of one's learning.

This section presents my self-reflection about the challenges and learnings obtained during the project implementation. Almost one year ago, I was looking for an employer that would fit my values of tolerance towards diversity, strong collaboration, striving for excellence, and continuous development, then I found TalentAdore. I have always preferred being part of ventures that provide an opportunity to serve people and I feel that one's contribution can make a difference. Therefore, TalentAdore seemed like the right type of company for which I would like to conduct a thesis project for.

I think of this experience as the learning process that challenged me to strive for my best possible performance. An immense amount of trust was placed in me, even though I was just a trainee. Being a part of the startup was very demanding, but it allowed to learn a lot about different functions and contribute to the company's roadmap. Sometimes learning lessons came in the form of failure, but that was considered as a natural part of the process. When I sent my initial application I wrote "The sky is the limit when it comes to human potential." I feel large gratitude for being given an opportunity to be between people who not only believe in it but also live it on a daily basis. At the end of my traineeship, I prepared the traineeship development portfolio and presentation (appendix 13). If there was one thing that I could have done significantly better, it would be more timely delivery of the report. I always had prioritized actual work, so it was really hard to allocate time for diverging results of the project instead of kicking-of next plans related to improving customer success processes at TalentAdore. Below I have written a self-reflection about the process of the project implementation.

The first project plan presented to the thesis advisor in May 2018 turned out to be unrealistic. It took twice more time than planned to discover the business context and define areas of possible contribution. Partly, this was a consequence of the summer vacation period that slowed down TalentAdore's operations, limited available resources, and hindered communication with customers. During this period, I kept myself distracted with some quick improvements that did not require as much planning, but could bring a quick, positive impact on customer success processes. It would have been better if I invested this time into compiling the written knowledge base because I did not have time to incorporate all aspect of reviewed literature later on.

In August 2018, I had explored the business context and identified existing and none-existing customer success elements. Accomplishing first two project steps had given

many ideas for the delivery form of the final product. To start developing customer success tools, I needed to explain their relevance to other employees and obtain support. This was a new experience that enhanced my cross-functional collaboration skills. Despite the fact that I had observed customer success activities for a couple of months, the language barrier restricted my ability to understand everything that happened in full-depth. Moreover, I needed to enable my colleagues to deploy and test my tools without being closely involved in the process. It was particularly hard with enhancements of onboarding - I was constantly failing to deliver applicable solutions. At this stage, I decided to start translating customer support requests and any other materials in the Finnish language that deprived me of having a better understanding.

On the bright side, the majority of tasks related to the project implementation could be performed in English. The product development phase was particularly interesting as touchpoints with customers brought to attention a lot of previously undiscovered insights. Company-wide awareness about customer success was increasing by showcasing how to make use of customer success tools. It would have been possible to stop development iterations in November 2018, but the company's growth was accelerating, and I was offered to extend the project until May 2019. Considering that this is beneficial for my personal development and the project's results, I was delighted to accept the offer. During the following months, our team grew, and we acquired customer success software that enabled further development of some tools.

Iteration rounds of delivered customer success tools finished around the end of February, giving a couple of months for observing and evaluating their applicability. I had planned to develop additional customer success tools, but other things were prioritized instead. At this time, my work-related responsibilities were no longer concerning the initial scope of the project, making it challenging to allocate time for finishing the report. This was also related to my workload, aside from being a trainee at TalentAdore. Throughout the project implementation, I had treated the practical side of the work as a higher priority than actual thesis writing. Thus, finishing this report promptly with the quality that I initially expected from myself was very challenging. I had followed the Double Diamond framework, identified the maturity of customer success processes at the commissioning company, and delivered customer success tools, but it was not easy to reflect all of that in writing. Finally, I could have made a better use of advising by not being uncomfortable with showing the work that is still in the progress and holding myself accountable to meet certain milestones no matter what. That would have helped to create the first version of the any deliverables and accelerate the progress.

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Appendices

Appendix 1. Proposed key performance indicators for the dashboard

The 1st priority:

New users (this month)
New jobs created? (this month)
New job applications (this month)
Withdrawn (this month)
Rejected (this month)
Out of rejected received feedback (this month)
Hired (this month)
Status updates sent (this month)
CandE entries (this month)
Average CandE rating (this month)
People added to Talent Community (this month)
People confirmed to be in Talent Community (this month)
job applications from Talent Community (this month)
job applications from Talent Community (in life time)

Appendix 2. Email presenting the business need for developing the dashboard

Hi everyone!

Below you will find:

- described business need and some case examples,
- what is customer success in brief (because the need for improved KPIs stems out of there),
- my observations regarding CS manager role in TalentAdore,
- expected outcome,
- conclusion and link to the excel file that suggests improvements.

1. BUSINESS NEED.

As the number of customers is increasing we need to put some monitoring in place, as well as start developing forward-looking mindset that company which provides SaaS anyway will have to do eventually. It is not yet our top priority to develop/integrate software that analyses customer behaviour and creates "health scores", but I strongly encourage to do basic improvements in admin view that would allow CS manager to optimize customer relationships and avoid of opt-outs.

I don't know how to answer the question raised in June as the comment in one of the documents "How much it will cost us if we do not have that info?", but I hope we can figure it out together. We have recorded a few cases when based on currently available key performance indicators VRA adoption after onboarding has been unsuccessful, having access to usage data will allow to prevent such situations.

2. WHAT IS CUSTOMER SUCCESS?

At its essence, customer success should focus on the customer experience with the goal of maximizing retention and Lifetime Value, in practice in TalentAdore it means four things:

- reducing/managing churn - customers who no longer want to be customers,
- ensuring full technical and knowledge enablement,
- improving overall customer experience/satisfaction,
- driving increased contract value for existing customers,

A major difference from customer support, customer success teams use data and analytics to determine which customers should be acted on, either because they appear to be at risk or because there appears to be an upsell opportunity or because there's a chance to engage with customer in meaningful way that supports users' knowledge/technical enablement at the relevant moment.

Given this background, in future it would be great to consider the implementation of system similar to https://www.planhat.com/, enable internal alerts and automatically deliver the right content, but for the time being we need to look for a solution that can help us to create basic Customer Success processes with existing resources.

3. MY OBSERVATIONS

According to my observations, our team and CS manager has extremely limited access to the information about customers and how they use our VRA, therefore all attention is given to customer support - break/fix concept. Of course, this touchpoint is critical to customers' overall experience with TalentAdore, but, in contrast, customer success should use data to proactively predict and avoid customer challenges (especially opt-outs), optimize resources spent by the team on various customers, as well as ensure that customers make practical and effective use of all VRA features (= provide superior candidate experience).

I personally intend to make sure that new KPIs are utilized, analysed and overlooked on weekly basis (customers in adoption phase) and on monthly basis (already onboarded customers) by me and the customer success team if we are going to implement them.

The current form of suggested improvements may be quite primitive in comparison to what could be done in future, but after researching this topic I strongly feel that we need to take a step forward towards strategic customer engagement and knowing if our customers use our VRA as we think they do. I would appreciate if you would help me to understand what's the best way to achieve it with available resources.

4. EXPECTED OUTCOME.

Proposed improvements of KPIs in admin view would allow CS manager to do two things: monitor each customer's' growth and success during the adoption phase and engage with already onboarded customers in meaningful way when seeing long-term stagnation or disruptive changes in KPIs.

Additionally, it would allow me to observe product adoption (beneficial for standardization of onboarding), because onboarding is not only one meeting, but process from the first touchpoint with until successfully using our VRA that has to be tightly monitored. I also would like to create and, if possible, pilot targeted content delivery to new users during onboarding and to those users whose KPIs indicate unordinary performance. The last, but

not the least - having access to hard data would provide me with better context of information obtained from interviews with customers.

5. CONCLUSION. The customer success team already makes use of the information available in admin view and she has re-confirmed that listed information would be useful. Here is the file with suggestions (appendix 1), feel free to ask questions, challenge my views and fill in gaps in my understanding, especially when it comes to IT. This is not an absolute priority, but it would be great if the next week we could discuss further at least the first two of following points:

- alternative short-term solutions that could support my need to know more details about customer profiles before having meetings with them
- how much time and monetary resources it would take to implement proposed KPIs, possible flaws/challenges,
- which of suggested improvements are going to be implemented, if any, based on their relevance, business need and cost,
- possible stages of implementation, approximate timeframe.

Thank you and, please, let me know what's the best time for you to have a chat about this next week.

Have a great day!

Appendix 3. Email invitation to the meeting that was sent to customers

Hi [customer's name],

TalentAdore team is very grateful for successful collaboration with [company's name] since fall 2017, but now we would like to take it a step forward. My name is Eliza and I am currently working on customers success and engagement project as it is part of our roadmap. Read more in the attached file.

I just read your blog - with help of the translator, I must admit. I am glad to hear about your experience and hope that recent product updates will make it even more pleasant. I would like to schedule a meeting with you in order to discuss how we could enhance our collaboration.

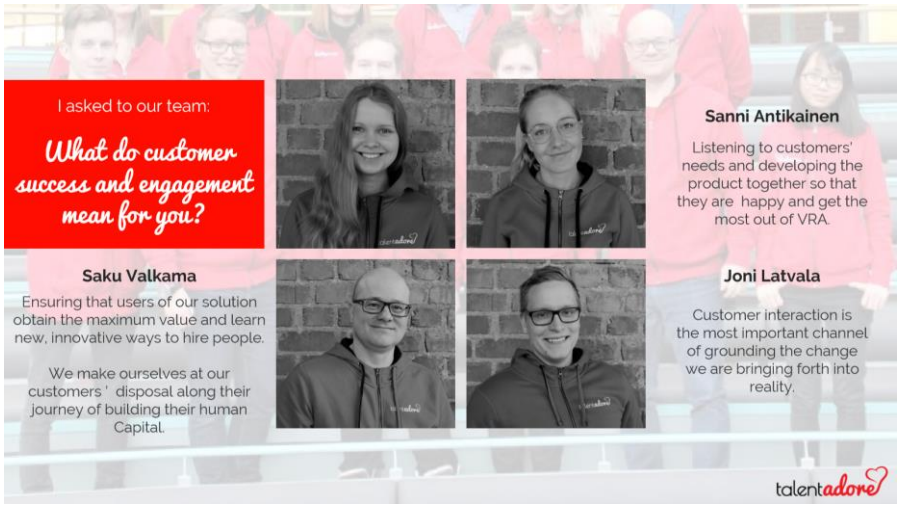
I really appreciated if the main focus of the conversation would be on how TalentAdore team can help your users to make the most of VRA (e.g. by delivering email content to new users) and how we can enable more frequent collaboration between TalentAdore and [company's name] users.

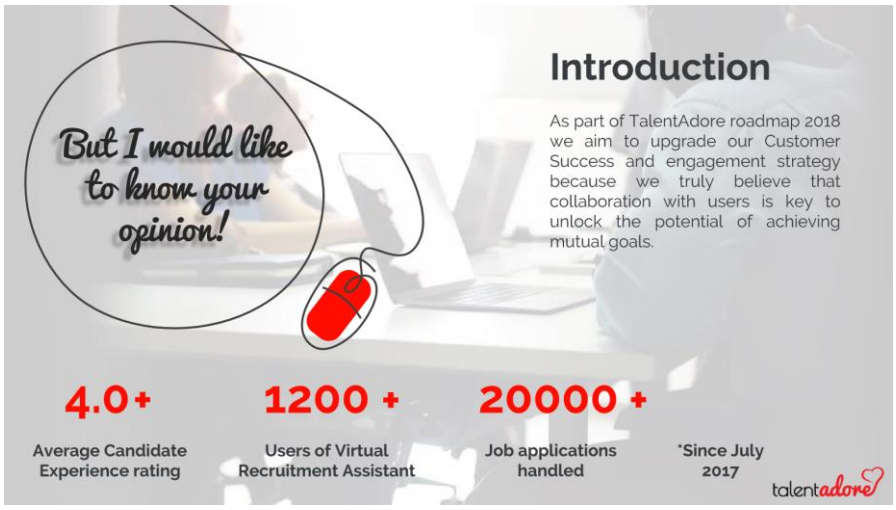
We just have introduced "Customer Success Journey map", as well as our R&D team is working on the next version of Talent Community. Considering that 1/4 of all applications handled in our system have been coming from [company's name] we strongly believe that your input is crucial.

Please, let me know if you are available for 1 h long meeting and what would be the closest suitable opportunity to arrange it. Thank you!

With best regards,
Eliza

Appendix 4. Presentation attached to the meeting invitation



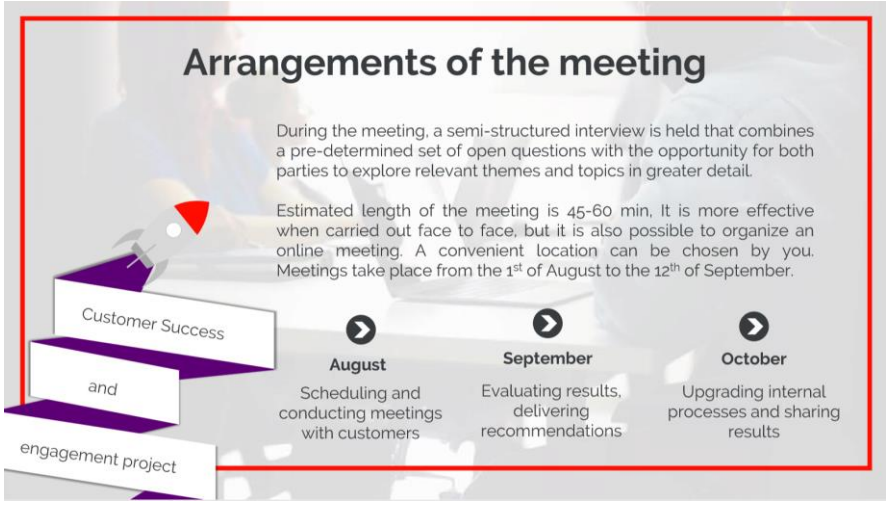

But I would like to know your opinion!
Introduction
As part of TalentAdore roadmap 2018 we aim to upgrade our Customer Success and engagement strategy because we truly believe that collaboration with users is key to unlock the potential of achieving mutual goals.
4.0+
Average Candidate Experience rating
1200 +
Users of Virtual Recruitment Assistant
20000 +
Job applications handled
*Since July 2017
talentadore

Goals of the project:
Gain an accurate and deep understanding of [ ] experience with TalentAdore Virtual Recruitment Assistant.
Explore challenges that possibly stand in the way of providing superior candidate experience and utilizing all existing VRA's features.
Discuss what would be the most convenient ways to engage in the future, as well as get feedback from other [ ] users.
Collect good case practices in order to share with TalentAdore team and, if you wish so, wider network.
talentadore

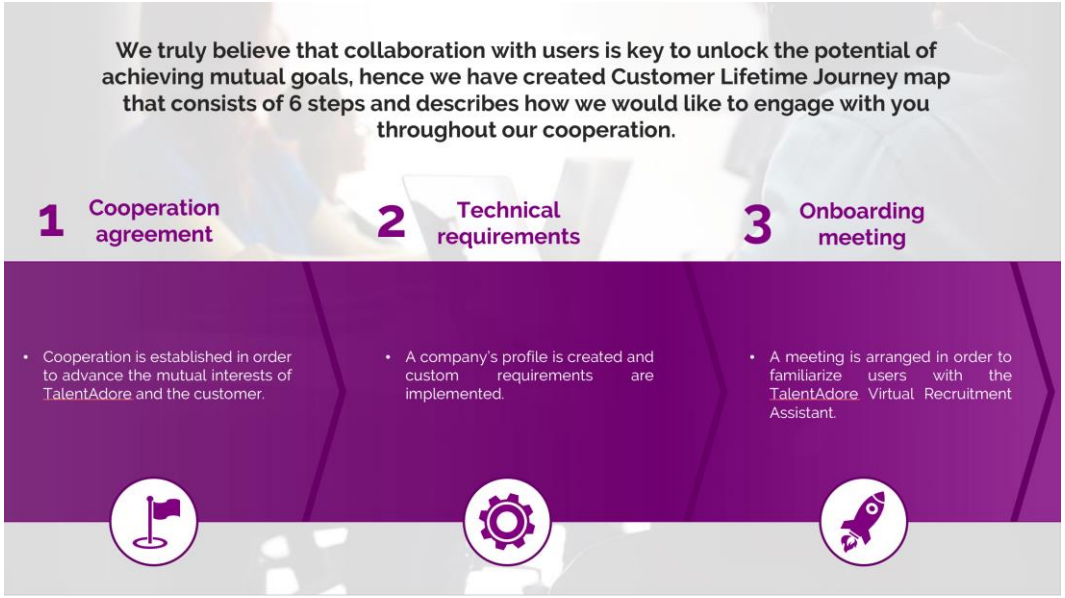
Welcome to our recently introduced Customer Success journey map!
1 Cooperation agreement
2 Technical enablement
3 Onboarding meeting
4 Initial adoption of VRA
5 Superior Candidate Experience
6 Lifetime engagement

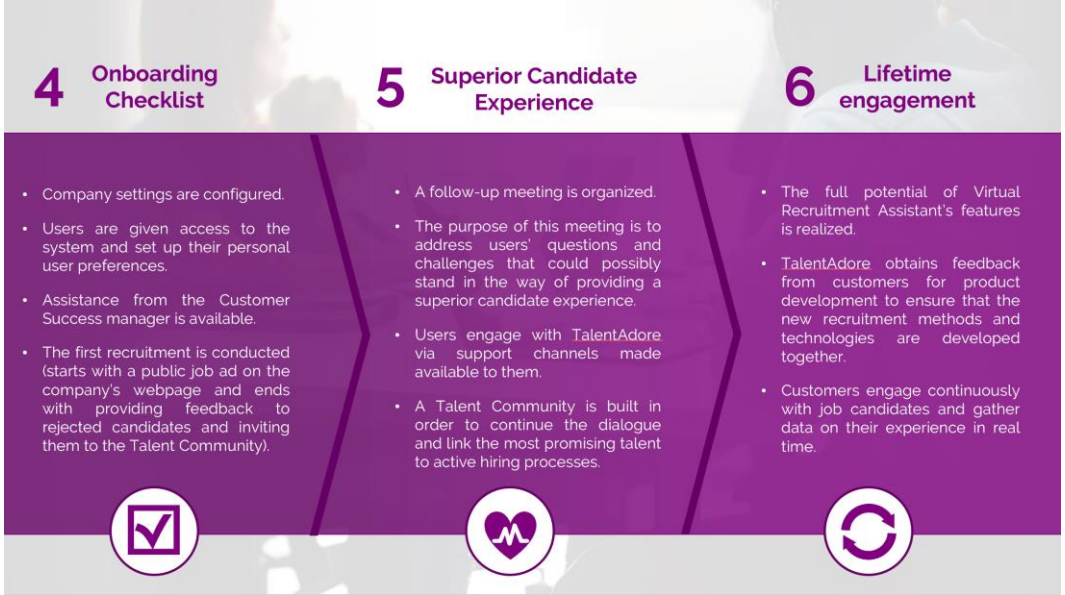
Customer Success Journey
1
Cooperation agreement
Cooperation is established to advance the mutual interests of TalentAdore and customer.
2
Technical enablement
Company's profile is created, if there are any custom technical conditions for VRA's adoption, then they are implemented.
3
Onboarding meeting
An online or offline meeting is arranged in order to familiarize customer with TalentAdore VRA. This stage is optional and provided at extra cost.

Initial adoption of VRA
The first end-to-never-end recruitment is done (starts with a public job ad on the company's webpage and ends with providing feedback to rejected candidates and inviting them to talent community).
4
Superior Candidate Experience
Full potential of VRA's features is utilized, assistance from Customer Success manager is available to overcome challenges that could possibly stand in the way of providing superior candidate experience.
5
Lifetime engagement
Cooperation review meetings are arranged at the convenience of both parties, there is established channel for obtaining feedback from users, new recruitment methods and technologies are developed together, good case practices are being shared with TalentAdore and wider network.
6


Arrangements of the meeting
During the meeting, a semi-structured interview is held that combines a pre-determined set of open questions with the opportunity for both parties to explore relevant themes and topics in greater detail.
Estimated length of the meeting is 45-60 min. It is more effective when carried out face to face, but it is also possible to organize an online meeting. A convenient location can be chosen by you. Meetings take place from the 1st of August to the 12th of September.
Customer Success
and
engagement project
August
Scheduling and conducting meetings with customers
September
Evaluating results, delivering recommendations
October
Upgrading internal processes and sharing results

Appendix 5. Evolved visualization of the customer lifecycle





Appendix 6. Hiring managers guide

How do I get started if I am a hiring manager?

CS team

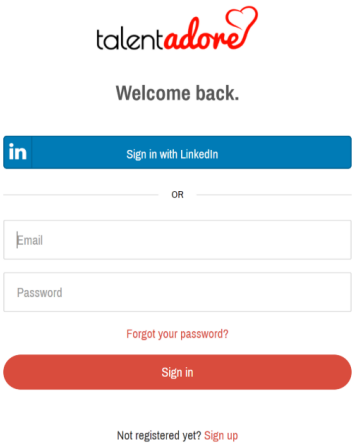
2 months ago · Updated

Unfollow

Welcome to the TalentAdore family! It is super easy to start using our Virtual Recruitment Assistant, follow the 5 steps below to learn to use our solution and to get the most value out of it.

STEP 1: Sign in to TalentAdore

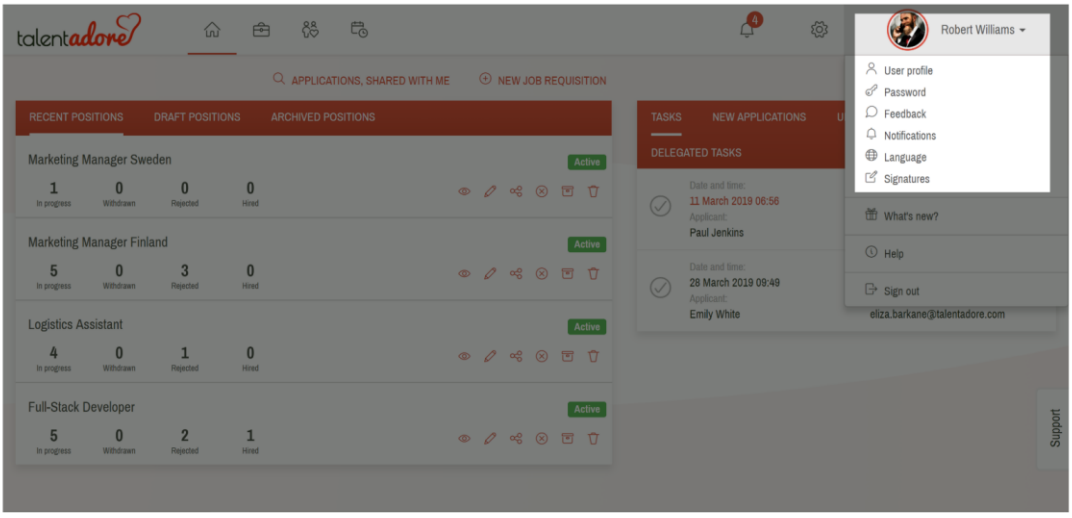
Admin user(s) of your company are responsible for giving you credentials to the system. They will ensure that you receive an email invitation from support@talentadore.com with a link to the login page (see the picture below).



To sign in, insert your email address (make sure you use the same email address to which you received the invitation), and the password provided in the invitation email to the page. After that, change your password and you are good to start working!

STEP 2: Configure your personal user preferences

To ensure smooth communication with your colleagues and candidates, start with setting up your personal information and signature. Click on your avatar at the top right corner where your email or name and surname are displayed to open the list of "User preferences" (see the picture below).



To assist you with configuration of “User preferences”, we have described functionality of all six items on the list below.

1. User profile - add your picture, name, surname, email, role, and timezone.

2. Password - change your password whenever necessary, especially after logging in for the first time.

3. Feedback - you can edit your feedback preferences as described in the list below. Please note that your company’s admin users may have further instructions on how to set these preferences.

- Add or remove items in the feedback messages: company logo, "Rate this recruiting process" question, service provider text to feedback messages
- Choose the formality level of language used in feedback messages
- Choose how a candidate should be addressed (first name, last name, or both.

4. Notifications - select when and how often you would like to receive email notifications.

5. Language - choose the default language of the user interface. This does not define the language that will be used when creating new positions and communicating with candidates. A specific language can be chosen each time when creating a new position.

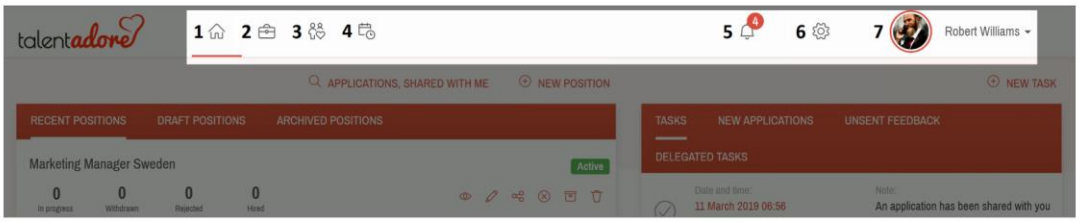
6. Signatures - define signatures that will be used when sending feedback and other messages. You can create signatures for each language separately, but a default signature will be used if the signature for a specific language is not set manually.

Note! Please, make sure that you do not move to the next step without setting up at least these two items: user profile and signatures.

STEP 3: Get to know the user interface

TalentAdore’s user interface for hiring managers consists of four main pages: “Home” (1), “Positions” (2), “Applications” (3), “Calendar” (4).

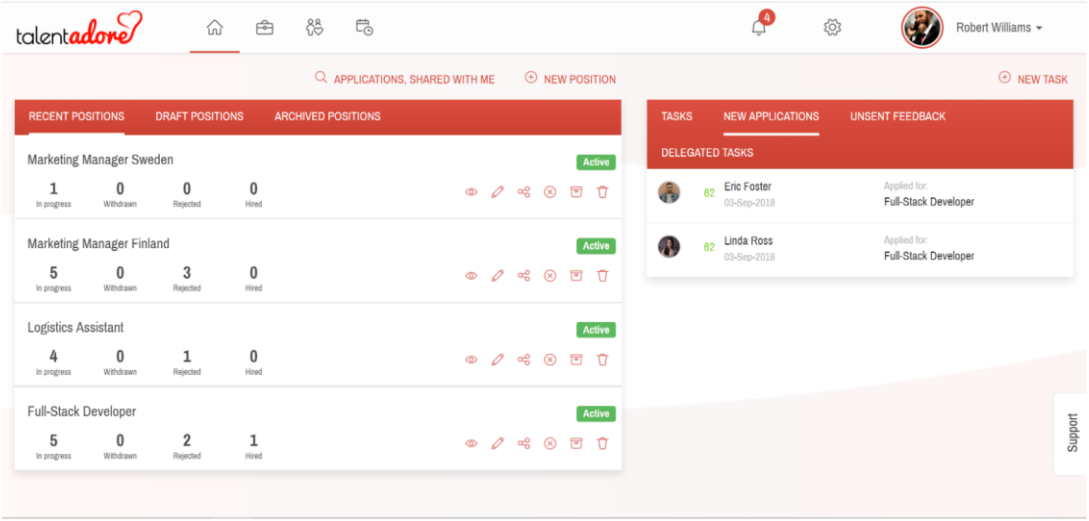
In addition, at the top right corner you can access “Notifications”(5), “Company settings” (6), and “User preferences” (7) that you already are familiar with. Please see the picture below.



"Company settings" are visible to hiring managers but cannot be modified. If you would like to edit company settings, contact the admin user(s).

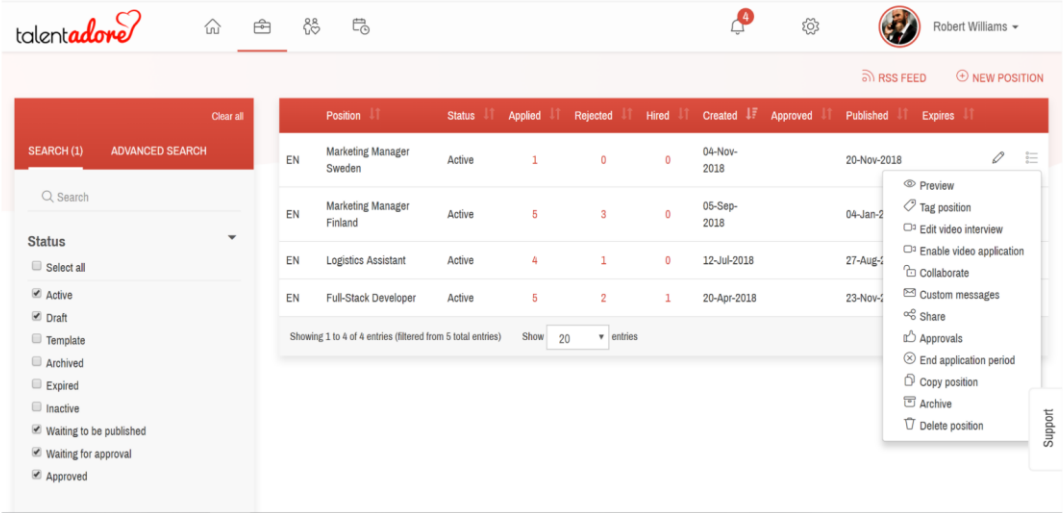
"Home" page

This page is like a dashboard, it provides an overview of recent positions to which you have been added as a collaborator or which you have created yourself. In addition, this page allows you to see a variety of other items, e.g. delegated tasks, tasks assigned to you, new applications, candidates who have not been sent feedback to.



“Positions” page

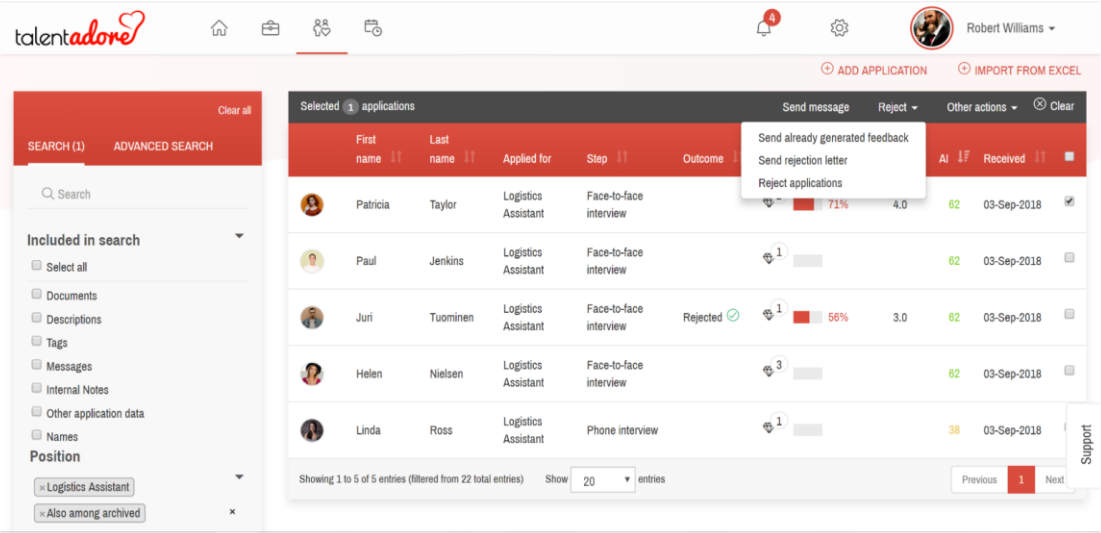
This page shows all positions to which you have been added as a collaborator or which you have created yourself. Click on “New position” at the top right corner under your avatar to create a new position. In case your company has enabled approval process, the same button is called “New job requisition”. In order to edit a position, click on the “Pencil” symbol. Other actions can be found from the list that opens up from the menu symbol.



“Applications” page

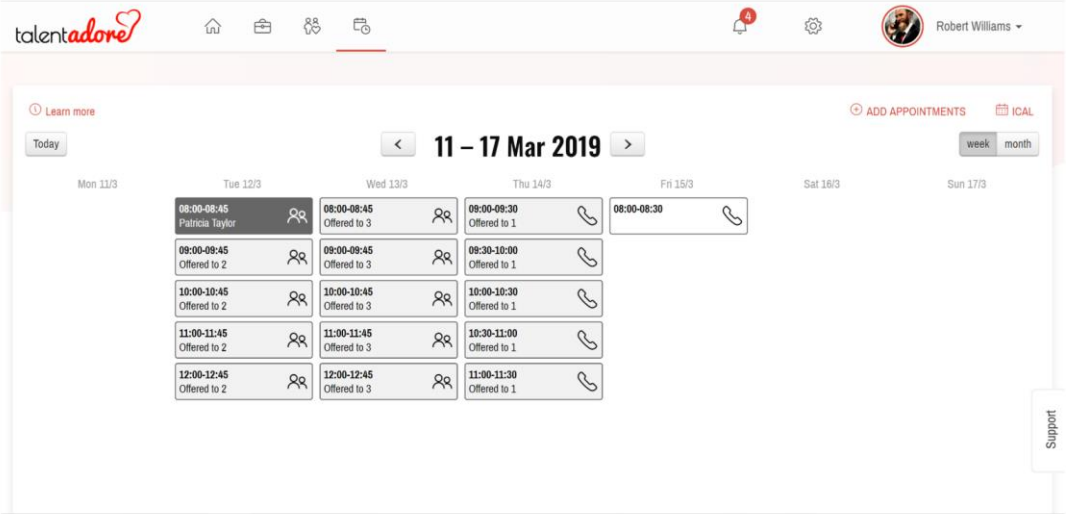
This page shows all applications that you have access to. To find the right application you can use a full-text search or narrow it down to specific kinds of data, such as specific information of the application, status, position, step or outcome, and whether the candidate has confirmed invitation to join the Talent Communit or not.

If you would like to send messages, copy or reject many candidates at once, select multiple candidates by checking the boxes on the right side of the screen. After it is done, choose the action from the “Mass action bar” (see the picture below).



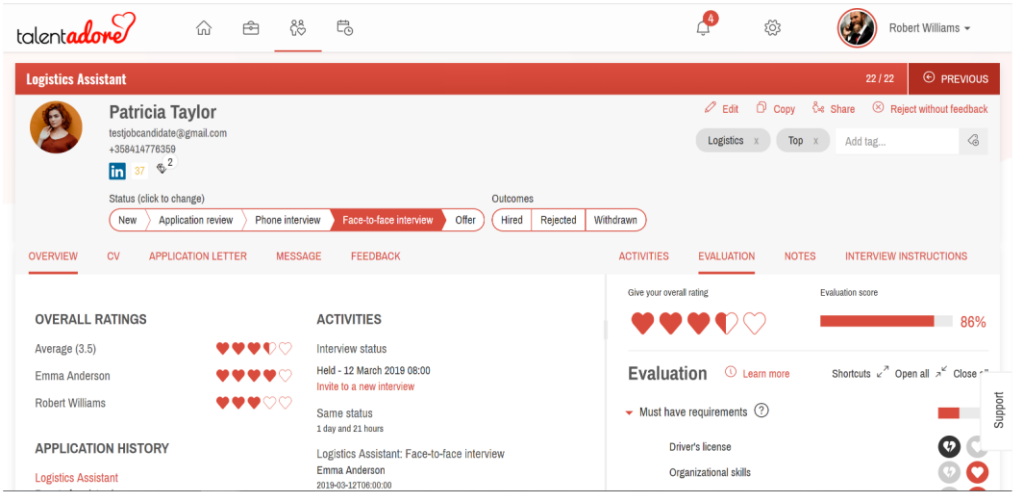
“Calendar” page

Calendar in the TalentAdore system helps to schedule interviews. This page shows all offered and booked time slots (see the picture below). You can add additional time slots by clicking on “Add appointments” at the top right corner under your avatar or by choosing time slots when sending out interview invitations. By clicking the “iCal” button you get a link to import your calendar into the calendar application.



STEP 5: Familiarize yourself with application view and candidate evaluation

Evaluating candidates, adding notes, and sharing with your colleagues are arguably the most important activities in recruiting process. Fortunately, it's super easy in “Candidate’s application view”. Take a look at the picture below to start exploring this.



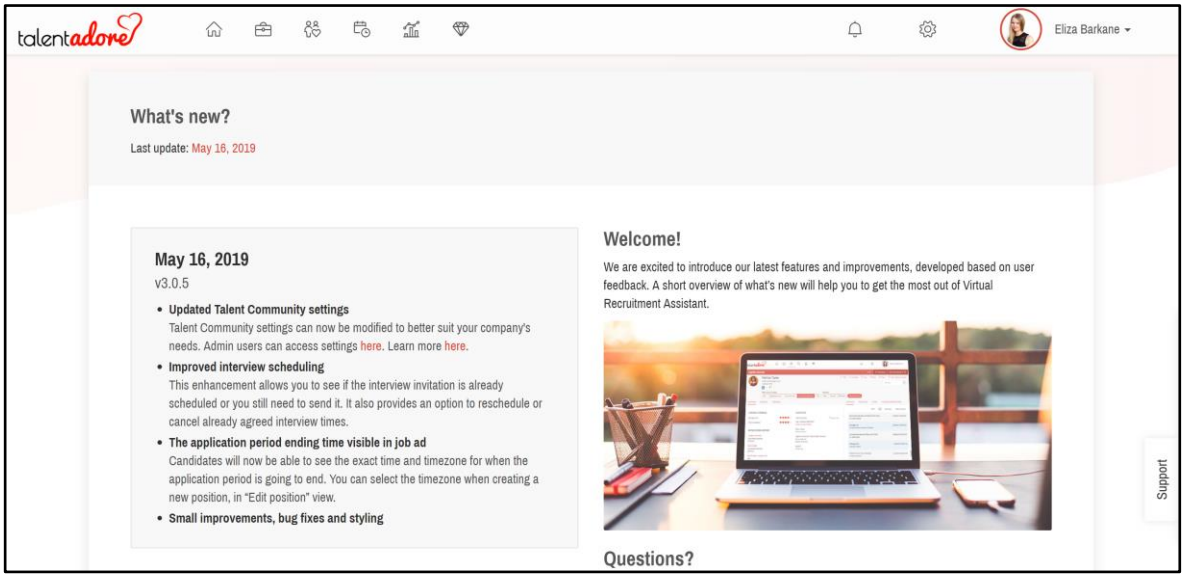
There are several actions you can take from this view, we have explained functionality of all items below.

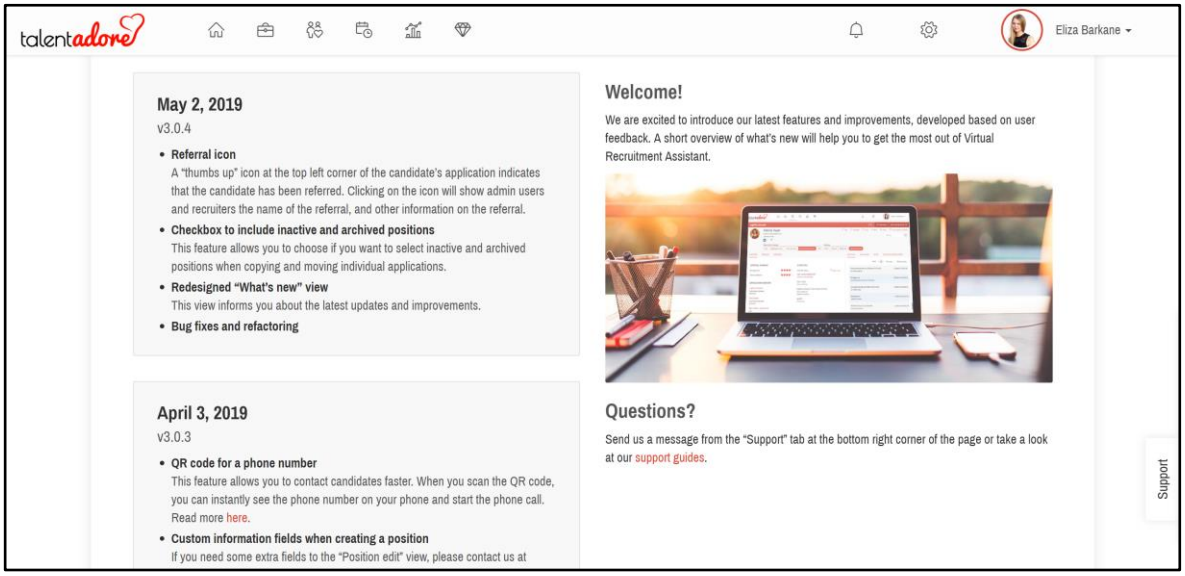
CONGRATULATIONS! You are now ready to start recruiting with the help of TalentAdore!

If you have further questions or comments, please contact:

- Your company’s admin user(s)
- TalentAdore’s “Support” tab at the bottom right corner.
- Support guides: open here.

Appendix 7. What's new page





Appendix 8. Post-sales handover form

Customer:

Contact person:
Email:

IT responsible:
Email:

Contract closing date: 00.00.00.
Contract period: x month

Cancellation period: x month
If pilot, the end date: 00.00.00.

Extra work EUR/h 0

	Optional services	**Comments (description, limitations)**	**DDL for delivery**
☐	# of custom forms		
☐	Integration 1 (removed)		
☐	Integration 2 (removed)		
☐	Integration 3 (removed)		
☐	Integration 4 (removed)		
☐	Data migration		
☐	Career pages		
	Other commitments		
☐	Add		
☐	Add		
☐	Add		

Special conditions if any

Appendix 9. Onboarding requirements checklist

Technical requirements

1. Please,send the following information to example@email.com, so that our team can proceed with creating your company profile and configuring the system:

- logo, brand's colour code(s), and other relevant brand guidelines.
- cover photo and content of sample job advertisement (can include additional pictures and videos).
- contact information of the person in charge of your company's webpage and other IT related matters.
- privacy policy that explains how the data of applicants is handled (link or attachment).

2. Up to three custom application forms can be created for the company if the built-in application form does not serve the company's needs.

- If you decide to use custom application forms, please, send us necessary requirements (what required or optional questions need to be included, checkboxes, dropdown, open fields, sliders etc.).

Appendix 10. Onboarding follow-up mterial 1

We truly believe that collaboration with users is key to unlock the potential of achieving mutual goals, hence we have created **Customer Success Journey map** that consists of 6 steps and describes how we would like to engage with you throughout our cooperation.

1 Cooperation agreement

2 Technical requirements

3 Onboarding meeting

4 Onboarding checklist

5 Superior Candidate Experience

6 Lifetime engagement

6 steps of Customer Success Journey map

Cooperation agreement 1
- Cooperation is established to advance the mutual interests of TalentAdore and customer.

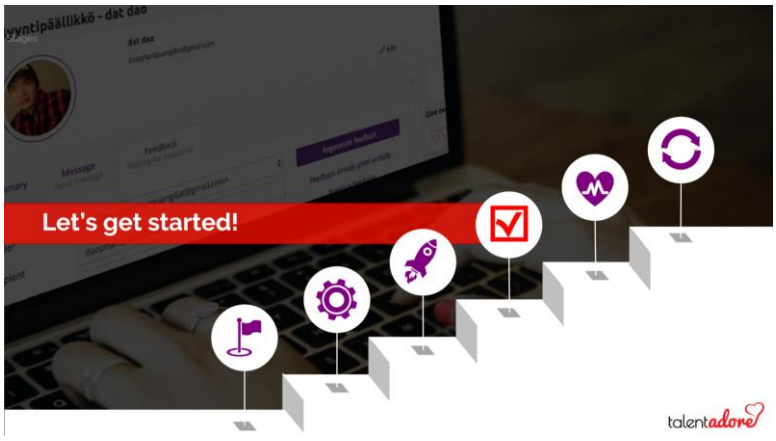
Technical requirements 2
- Company's profile is created and custom requirements are implemented (if there are any).

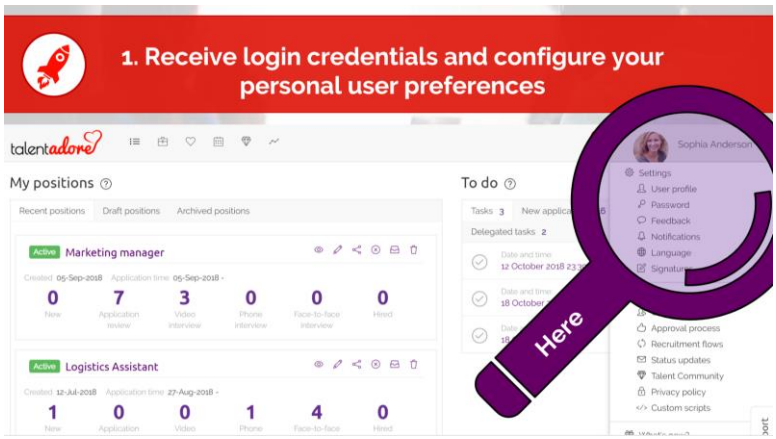
Onboarding meeting 3
- An online or offline meeting is arranged in order to familiarize customer with TalentAdore Virtual Recruitment Assistant.

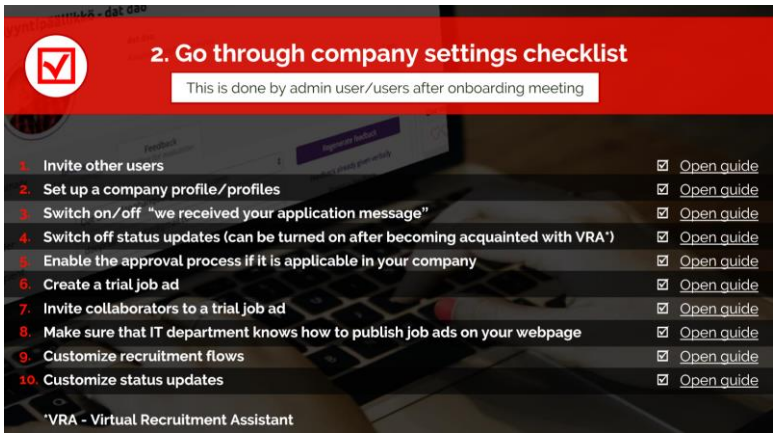
Onboarding checklist 4
- User preferences and company settings are configured.
- New users are introduced to the onboarding checklist.
- The first end-to-never-end recruitment is done (starts with a public job ad on the company's webpage and ends with providing feedback to rejected candidates and inviting them to talent community).

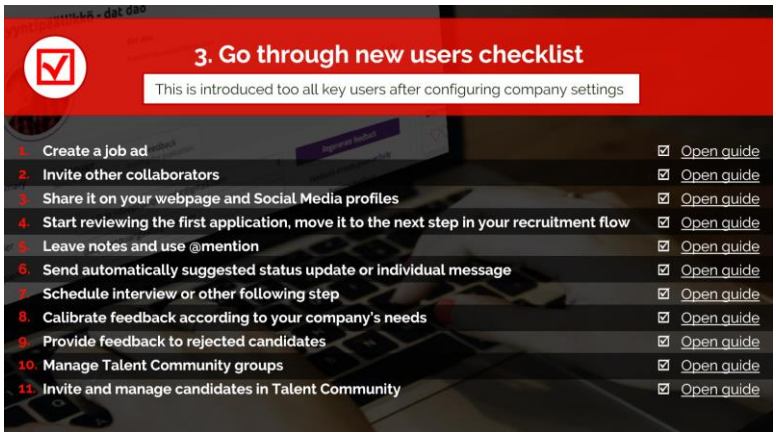
Superior Candidate Experience 5
- Full potential of Virtual Recruitment Assistant's features is realized.
- Assistance from Customer Success manager is available to overcome challenges that could possibly stand in the way of providing superior candidate experience.
- Talent Community is built in order to continue dialogue and link the most promising talents to active hiring processes.

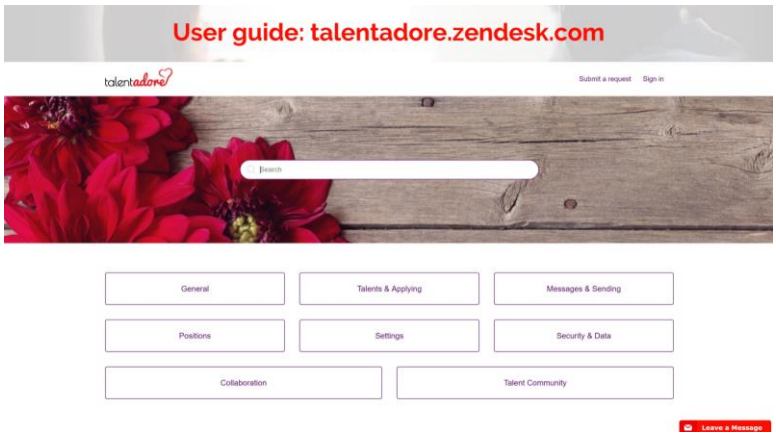
Lifetime engagement 6
- Customers engage with TalentAdore via support channels made available for them.
- TalentAdore also obtains feedback from customers for product development to ensure that the new recruitment methods and technologies are developed together.
- Moreover, our customers engage continuously with job candidates and gather data on their experience in real time.

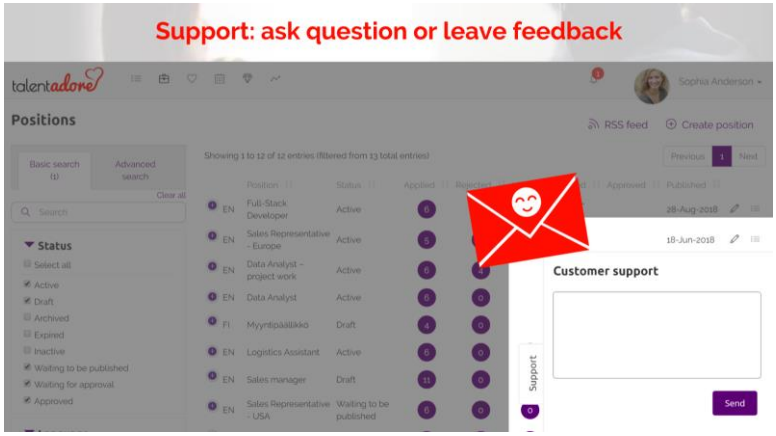

Let's get started!
talentadore

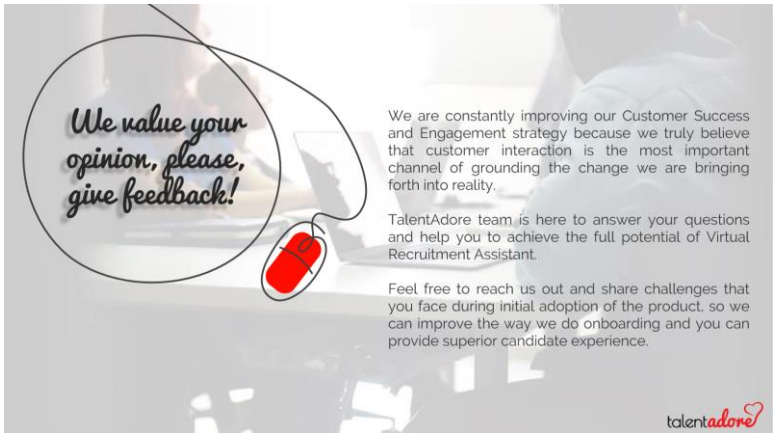

1. Receive login credentials and configure your personal user preferences
talentadore
My positions
Recent positions
Draft positions
Archived positions
Active
Marketing manager
Logistics Assistant
To do
Tasks 3
Delegated tasks 2
Sophia Anderson
Settings
User profile
Password
Feedback
Notifications
Language
Approval process
Recruitment flows
Status updates
Talent Community
Privacy policy
Custom scripts
Here

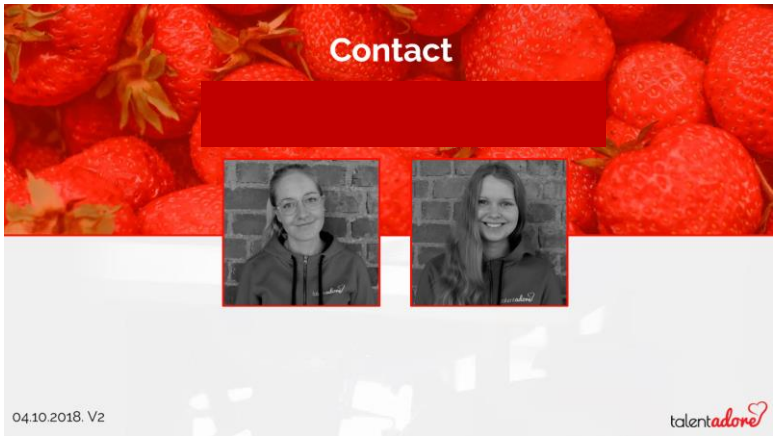

2. Go through company settings checklist
This is done by admin user/users after onboarding meeting
1. Invite other users
2. Set up a company profile/profiles
3. Switch on/off "we received your application message"
4. Switch off status updates (can be turned on after becoming acquainted with VRA*)
5. Enable the approval process if it is applicable in your company
6. Create a trial job ad
7. Invite collaborators to a trial job ad
8. Make sure that IT department knows how to publish job ads on your webpage
9. Customize recruitment flows
10. Customize status updates
Open guide
*VRA - Virtual Recruitment Assistant


3. Go through new users checklist
This is introduced too all key users after configuring company settings
1. Create a job ad
2. Invite other collaborators
3. Share it on your webpage and Social Media profiles
4. Start reviewing the first application, move it to the next step in your recruitment flow
5. Leave notes and use @mention
6. Send automatically suggested status update or individual message
7. Schedule interview or other following step
8. Calibrate feedback according to your company's needs
9. Provide feedback to rejected candidates
10. Manage Talent Community groups
11. Invite and manage candidates in Talent Community
Open guide

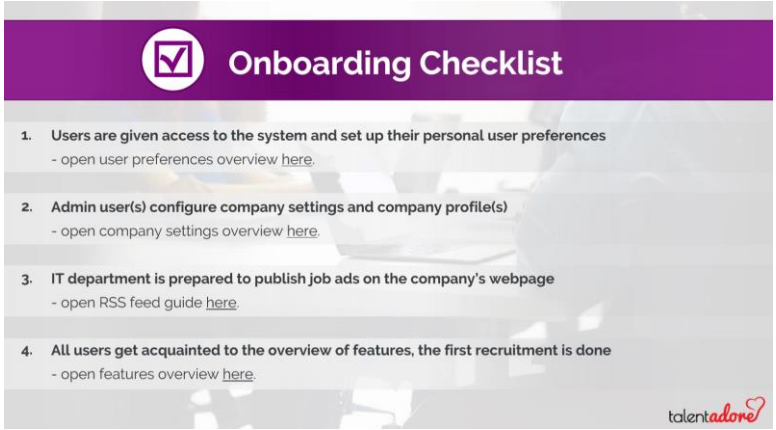

User guide: talentadore.zendesk.com
talentadore
Submit a request
Sign in
Search
General
Talents & Applying
Messages & Sending
Positions
Settings
Security & Data
Collaboration
Talent Community
Leave a Message

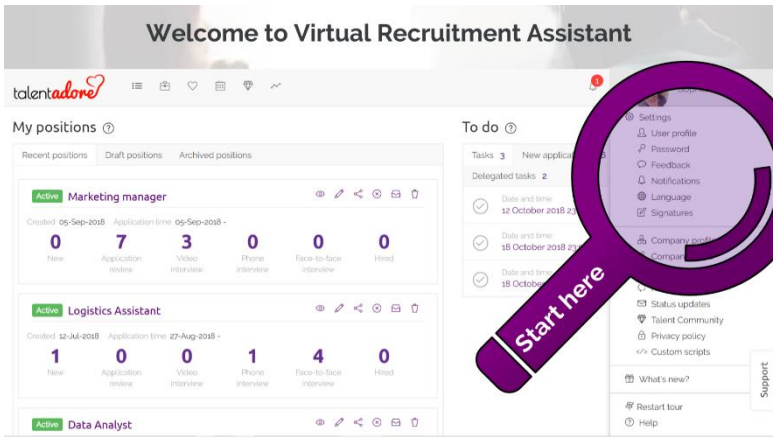

Support: ask question or leave feedback
talentadore
Sophia Anderson
Positions
RSS feed
Create position
Basic search
Advanced search
Clear all
Search
Status
Select all
Active
Draft
Archived
Expired
Inactive
Waiting to be published
Waiting for approval
Approved
Showing 1 to 12 of 12 entries (filtered from 13 total entries)
Previous
Next
Position
Status
Applied
Rejected
Approved
Published
Full-Stack Developer
Sales Representative - Europe
Data Analyst - project work
Data Analyst
Myyntipäällikkö
Logistics Assistant
Sales manager
Sales Representative - USA
Active
Draft
Waiting to be published
28-Aug-2018
18-Jun-2018
Customer support
Send
Support


We value your opinion, please, give feedback!
We are constantly improving our Customer Success and Engagement strategy because we truly believe that customer interaction is the most important channel of grounding the change we are bringing forth into reality.
TalentAdore team is here to answer your questions and help you to achieve the full potential of Virtual Recruitment Assistant.
Feel free to reach us out and share challenges that you face during initial adoption of the product, so we can improve the way we do onboarding and you can provide superior candidate experience.
talentadore


Contact
04.10.2018. V2
talentadore

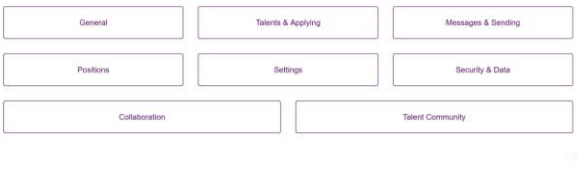
Appendix 11. Onboarding follow-up material 2

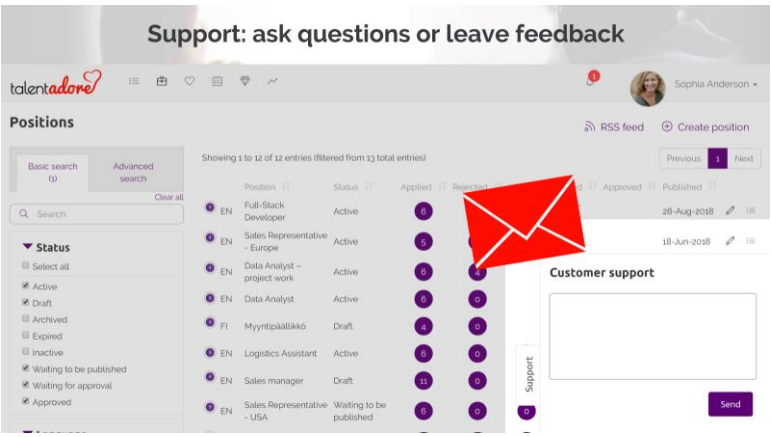


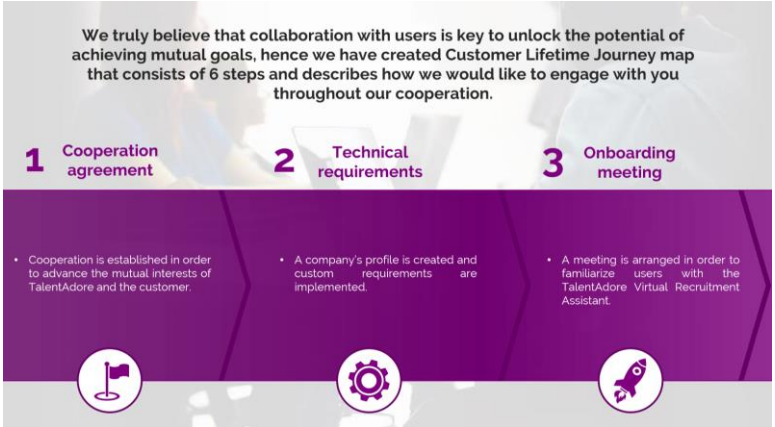


User guide: talentadore.zendesk.com

User guide: talentadore.zendesk.com




Support: ask questions or leave feedback
talentadore
Sophia Anderson
Positions
RSS feed
Create position
Basic search (1)
Advanced search
Clear all
Search
Status
Select all
Active
Draft
Archived
Expired
Inactive
Waiting to be published
Waiting for approval
Approved
Showing 1 to 12 of 12 entries (filtered from 13 total entries)
Previous
1
Next
Position
Status
Applied
Approved
Published
EN Full-Stack Developer Active 6 28-Aug-2018
EN Sales Representative - Europe Active 5
EN Data Analyst - project work Active 6 4 18-Jun-2018
EN Data Analyst Active 6 0
FI Myyntipäällikkö Draft 4 0
EN Logistics Assistant Active 6 0
EN Sales manager Draft 11 0
EN Sales Representative - USA Waiting to be published 6 0
Customer support
Support
0
Send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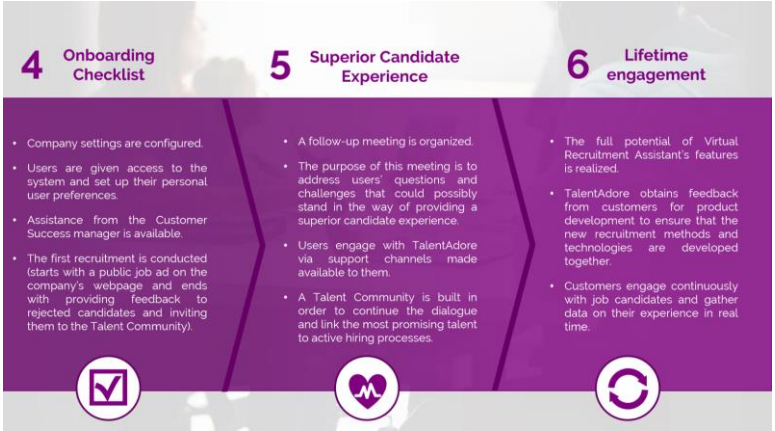
1 Cooperation agreement
Cooperation is established in order to advance the mutual interests of TalentAdore and the customer.
2 Technical requirements
A company's profile is created and custom requirements are implemented.
3 Onboarding meeting
A meeting is arranged in order to familiarize users with the TalentAdore Virtual Recruitment Assistant.


4 Onboarding Checklist
Company settings are configured.
Users are given access to the system and set up their personal user preferences.
Assistance from the Customer Success manager is available.
The first recruitment is conducted (starts with a public job ad on the company's webpage and ends with providing feedback to rejected candidates and inviting them to the Talent Community).
5 Superior Candidate Experience
A follow-up meeting is organized.
The purpose of this meeting is to address users' questions and challenges that could possibly stand in the way of providing a superior candidate experience.
Users engage with TalentAdore via support channels made available to them.
A Talent Community is built in order to continue the dialogue and link the most promising talent to active hiring processes.
6 Lifetime engagement
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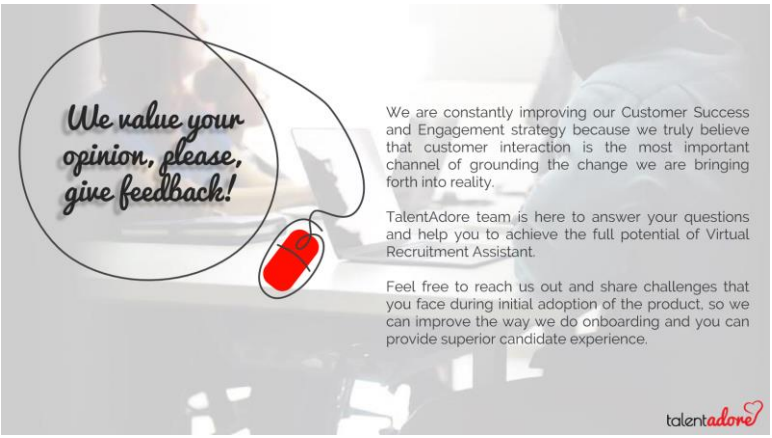
Customers engage continuously with job candidates and gather data on their experience in real time.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Feel free to reach us out and share challenges that you face during initial adoption of the product, so we can improve the way we do onboarding and you can provide superior candidate experience.
talentadore

Appendix 12. Author's job description and goals

JOB DESCRIPTION and TARGETS	
PLANNING PERIOD	00.00.0000.-00.00.0000.
NAME	Eliza Barkane
TITLE	Customer Success Specialist
TEAM	Customer Success team
TARGETS FOR THE TEAM	**General goal:** Ensure that customers get the maximum value from VRA and are happy. We want to make them feel that they are supported. **Targets for quarter:** ● Using Planhat actively (on a daily basis). ● Enhancing customer advocacy and publishing CS stories. ● Completing (100%) English and Finnish guides in Zendesk. ● Improving CS teams processes and cross-team collaboration. ● Having ownership of renewals and upsells.
LOCATION	**Address**
REPORTS TO	**Name Surname**

JOB DESCRIPTION
● Eliza is responsible for implementing CS strategies and initiatives aligned with the overall business strategy. ● Her job is to work closely with customers to drive outcomes leading to successful product adoption, renewals, expansion, and advocacy across all involved stakeholders, especially customers. ● A crucial part of the job is cross team collaboration with purpose to advance the product development and make effective use of company's resources.
DUTIES & RESPONSIBILITIES
● Be involved in all necessary aspects of customer support, onboarding, training and feedback loops. ● Write, maintain and update user guides in English. ● Advance processes which optimize customer experience and use of CS team's resources e.g. drive Planhat's adoption. ● Contribute to product development and represent the voice of users.

GENERAL TARGETS FOR THIS POSITION	TARGETS FOR NEXT QUARTER
● The same as targets for the team.	● 100% of users guides: reviewed and aligned according to common guidelines. ● Planhat adoption: have 100% accurate data, make meaningful progress regarding usage data (KPIs) import, have a clear process in use for MRR/NRR and invoice management. ● 1-2 blog posts: "How to make the most out of Talent Community" and "How to get the most value out of VRA".

PERSONAL DEVELOPMENT PLAN

Appendix 13. Author's traineeship review

Eliza's traineeship review

April 2018 - April 2019

Recap of the beginning

How can I help TalentAdore team?

I am interested in conducting a qualitative research that would aim to improve the experience of TalentAdore customers/stakeholders by using service design methods.

I strongly believe that service design thinking is a part of TalentAdore culture on daily basis, but I would like to offer one extra mind in your team that would be dedicated to figure out how to deliver desirable, enjoyable, efficient, and effective experiences that truly serves company's vision to bring the human touch back to recruitment. To get started I would like to ask you:

What challenges are you currently facing? If you were to improve one thing about TalentAdore today and had no limited resources, what would it be?

When was the last time when you validated your assumptions? How often do you collect qualitative data from your customers or the service end users? What are the next cornerstones to be reached towards company's global expansion, what keeps you from it? What information are you missing? How could I help you to obtain it?

Service Design tools have potential to provide a deeper understanding of various customer /stakeholder groups, identify opportunities and challenges, retain all stakeholder perspective in the delivery of complex services, increase profits even when you have captured the market and expand other margins.

Recap of the beginning

6 phases of Design Thinking process

4. Prototype

Build real, tactile representations for a subset of ideas to understand what works. and what does not.

3. Ideate

Generate a range of crazy, creative ideas.

2. Define

Combine all results of and identify where challenges and/or opportunites exist.

1. Empathize

Conduct research to develop a deep understanding of customer experience.

5. Test

Return to customers for feedback and verify that it achieves your goals.

6. Implement

Put the vision into the effect. Ensure that your solution is materialized and touches the lives of your end users.

/ www.nngroup.com/articles/design-thinking /

Recap of the beginning

How can TalentAdore help me to connect the dots?

This opportuntiy would help me to

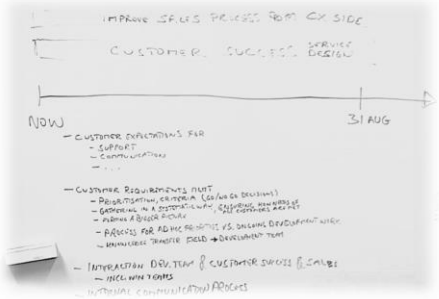
- utilize my customer oriented mindset and willingnes to challenge myself in dynamic environemnt,
- apply the knowledge obtained in the univerity and gain prfessional experience,
- learn more about service design and start developing portfolio to apply for Master's degree in Aalto,
- follow my passion for doing meangingful work that makes a difference,
- be part of team that fits my values of tolerance towards diversity, striving for excellence, and continuous development.

Notes from the
Initial discussion

Recap of the beginning

Main objective:

- Explore and evaluate customer experience by utilizing service design methods in order to create standardized customer success processes.



Stages
of the project

- **Discover** the context of business need and establish the initial knowledge base.
- **Define** the maturity level of customer success processes at TalentAdore and identify the project's focus areas.
- **Develop** and test solutions which contribute to increasing the maturity level of customer success processes.
- **Deliver** applicable products, evaluate their applicability, deliver recommendations for further development, and reassess the maturity level of customer success processes at TalentAdore.
- **Discuss** conclusions, evaluate the project, present author's reflection of own learning and professional development.

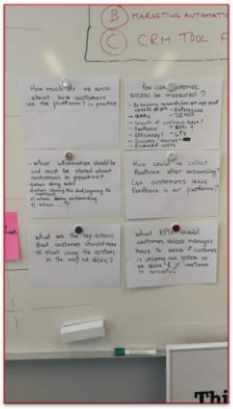
Progress
made

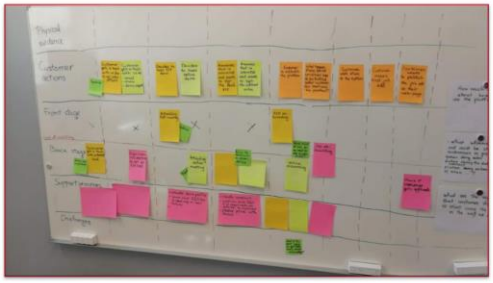
Raising awareness about Customer Success, increasing maturity of CS function

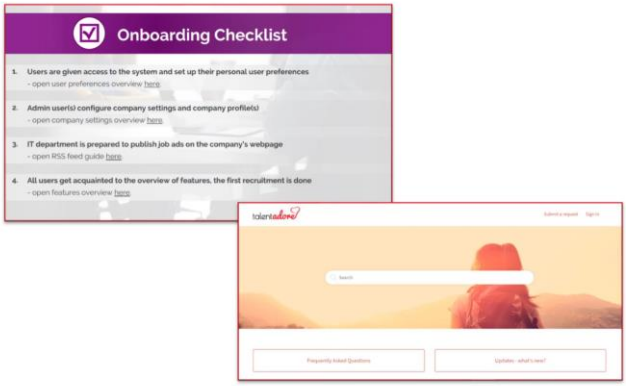
Progress
made

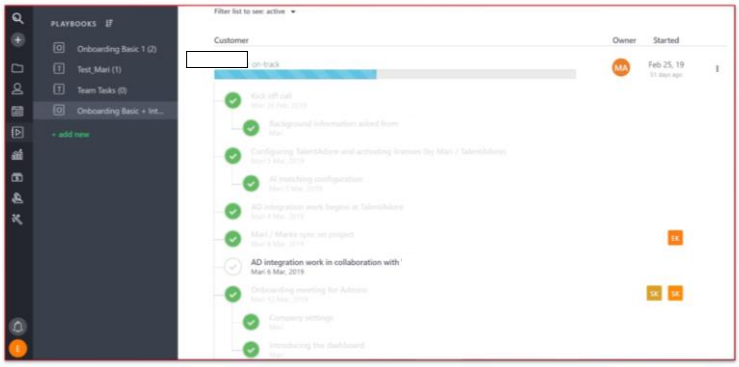
Enhancing onboarding capacity

Onboarding process for new users









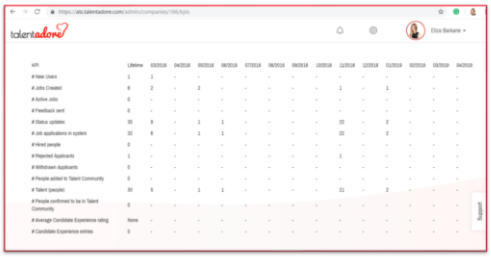
Progress made

Having all data in one place

planhat

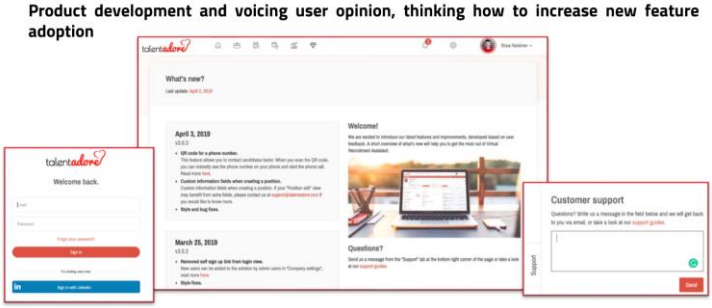
Progress
made

KPIs, health monitorning, evaluating if customers get the value/use the product (important for upsells)



Progress
made

Product development and voicing user opinion, thinking how to increase new feature adoption



Traineeship
deliverables

- Transforming CS function from reactive to predictive approach;
- Designing customer health criteria;
- Using lifecycle stages;
- Creating playbooks (e.g. for onboarding);
- Managing subscriptions.
- Handling handoffs;
- Handling upsells;
- Handling churn;
- Organizing feedback loops;
- Using customer success management software.