Successes and Challenges When Scaling CS
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Building a scaled CS program can help your team meet the needs of your customer more effectively due to its ability to provide information when it is needed. However, making the transition to scaled CS can bring challenges and roadblocks along the way.

Here are some of the successes and failures that folks in various stages in the scale journey are experiencing.

Successes

Emerging Scaled CS Programs

- Tools are important
    - Automating outreach to improve product usage
        - Auto messaging functionality saves time and multiplies efforts
    - Improve product usage reports for customers around suggestions on how to increase usage as a place to start
        - Allows you to better forecast accounts that might have issues 6 months from now
            - Work to address gaps in usage
            - Prepare more effectively for potential revenue impacts

Expanding Scaled CS Programs

- Ability to work with other departments closely
    - CSM involvement in outgoing communication
    - Driving better customer engagement through ad hoc meetings
- Increased connection for low touch customers while found ways to become more high touch with a small team

- Digital strategies became more of a focus resulting in webinars and increased automation to scale customer touch

Considering/Planning for Scales CS

- Once the content is created, how do you help educate customers to move into a self-service mindset to start with?
    - Some are more inclined to pursue self-help than others
    - Use things like email signature, out of office messages, etc to communicate this resource
    - Make sure it is located in a single place with good navigation
    - Community can be used to allow users to connect with each other
        - Stand-alone platform
        - LinkedIn

Challenges

Emerging Scaled CS Programs

- Data can be a problem, especially with understanding data usage
    - Creates challenges for meaningful client conversations for adoption
- Data understanding is an issue
    - What does the data mean? Are they solving business problems using your product?
- Creating strong support for customers in a scaled program
    - What information do they need?
    - How do you customize the experience for your customers to make it more applicable?
    - Ability to advocate with product teams to meet customer needs more effectively
- If the product (or portions of the product) isn't conducive to self-service, how do you help every customer in a 1:1 manner that isn't able to scale well
- Other teams that want the data that lives in your CS tool but requires a lot of the CSM time to pull and explain

Expanding Scaled CS Programs

- Having to operationalize the inclusion of another team into the program
- Can end up becoming more reactive (service vs. success) due to larger teams
- Move from CS owned space into more of a partnership which requires work to navigate
- Needing to migrate from servers to a cloud to meet scaled onboarding needs
- Data on usage is still lacking
- Matching your scale needs to growth can be very difficult if you are growing quickly (i.e. 80% YOY)
- Figuring out the low versus high touch balance for maintaining strong customer relationships
- When you have poor fit customers, it results in poor roll outs which means scale is another complication
- Need to focus on onboarding and self-service support to free up CSMs to work more strategically
- Navigating expansion and upsell opportunities while scaling

- Ensuring your scale programs can grow with the customer (Ex. 2 different products with 3 verticals – how do you make sure that the needs of each of these paths are met well)
- Bridging the CS team across the products can be difficult

Considering/Planning

- If you have huge books of businesses, how do you work to scale everyone?
- CSMs are seen as more of a support function, working on support tickets and questions
- Lack of an existing knowledge base which prevents customers from self-servicing
    - Identify the needs of the customer along the journey
    - Create content that addresses each of these needs
    - Organize them well
- Support function needs to evolve to let CSMs become more proactive through
    - Identification of best practices
    - Online help channels
    - Dedicated support team
    - Webinars
- Move from reactive to proactive
    - Good support team to help with technical questions and issues
    - Well-segmented users
        - Define and identify characteristics
        - Need good data
        - What is your Ideal Customer Profile?
        - Don’t over-segment