

Customer Success Managers

Key Responsibilities and Why the Role Is So Critical



At a Glance

Within service provider organizations, customer success managers (CSMs) have a pivotal role to play. However, in many service provider organizations, the CSM role isn't properly resourced or understood, which can leave a significant gap in the provider/client relationship. This strategy brief takes a detailed look at the CSM role, outlining why it is so critical and the key responsibilities that CSMs need to address in order to be successful.

Introduction: The Customer Success Manager

The onboarding process represents a critical juncture, one that marks the first time in which the service provider has to move from selling to actually start delivering on the services, capabilities and expertise that were sold. This time is a critical one for all the service provider's staff but perhaps none more so than the CSM.

The CSM plays a central role, both up front and over the course of the client relationship. The CSM has several responsibilities, but chief among them is to establish and then sustain a strong relationship with the customer. Over the course of the client's relationship with the service provider, it is the CSM that is the primary liaison.

Without a dedicated CSM, many service provider organizations see that there is a void in account coverage, one that sales, project management and support aren't readily equipped to address.

Typically, after an initial deal is signed, the sales representative will need to move on to focus on generating net new business, and will only engage with the client again when it is time to follow up on renewals. Similarly, once project managers complete a new customer onboarding project, they'll need to move on to the next customer engagement.

While support representatives will be engaged, their focus will be on specific issues, and ensuring they get addressed.

The CSM role sits between these different groups and the client organization. This individual needs to take a sustained, long-term view of engaging with the client. Ultimately, the CSM needs to be acting as a client advocate and ensuring that everyone is getting what they need to make the relationship a successful one.

The CSM role can be demanding, and it is one that requires a unique combination of skills and attributes. The CSM needs to have the technical savvy required to gain a solid understanding of the client environment. In addition, they also must possess the business acumen and people skills needed to work with clients at a strategic level, and to engage effectively with contacts across all levels of client and service provider organizations.

Whether you are looking to add the CSM function into your organization, or you're looking to refine the execution of the team members that are currently assigned the CSM role, it is important to have a clear, comprehensive understanding of the CSM's responsibilities and how they evolve over the course of the client engagement. In the following sections, we provide a look at some of the CSM's most critical responsibilities.

Kickoff and Onboarding Responsibilities

As soon as a new customer signs on with a service provider, the CSM will be the one taking responsibility for managing the customer relationship. Early on, the CSM needs to set expectations with clients and educate them about relevant processes, including support interactions, communication flows, escalations and so on. The CSM is also responsible for interviewing client contacts in order to understand how users work with relevant technologies and then communicating that information to the technical team.

Once the client signs the contract, the kickoff meeting should take place. During the kickoff meeting, introductions should occur between the appropriate team members from the service provider and the client. From the service provider, the CSM and the project manager will be key attendees. On the client side, this meeting should generally include decision makers and appropriate IT staff. During this kickoff meeting, the project manager leading the onboarding effort will discuss the onboarding process, plans and timeframes.

During the onboarding process, the project manager should be the main point of contact for any communications related to the onboarding project, including discussing the

project plan and timelines and any and all updates or changes that may occur along the way. During this onboarding phase, it is important that there is direct communication between the project manager and the client in order to ensure onboarding efforts, status, feedback and input are occurring directly, and in the most timely and efficient manner possible.

However, if issues should arise, for example, if the customer has concerns with onboarding timeframes or execution, the customer should be clear that those concerns should be taken up directly with the CSM. If problems arise, the CSM should be running point, working with contacts in both organizations to manage expectations, ensure service provider staff are clear on requirements and so on.

Once onboarding has been completed, and the customer has signed off on the deliverables agreed upon, the service provider can start billing, usually on a monthly basis, for ongoing services. The following section looks at the responsibilities the CSM will have from this point forward.

Ongoing Responsibilities

Once the onboarding process has been completed, most communications, except for those concerning technical support issues, should be going through the CSM. Throughout the entire span of the service provider's relationship with the customer, the CSM is the one responsible for ensuring that the client gets to the right people within the service provider organization, and that they ultimately have their questions answered, issues resolved and needs addressed.

Any time the client has issues, whether with support escalations or non-technical issues like contract or SLA questions, the CSM should be the initial point of contact and take the lead on providing assistance. The CSM will need to route these inquiries to the

appropriate staff members within the service provider organization. For example, if the customer has billing questions, the CSM would route the inquiry to the appropriate accounts receivable contact. Or, if the client contact is interested in getting information on additional products or services, he or she would be routed to the appropriate sales representative. Either way, the CSM should remain in the loop, ensuring questions are answered and tracking progress.

Both during the onboarding process and after, the CSM should schedule regular meetings to stay connected with the customer. These ongoing meetings help demonstrate commitment, show value and keep efforts coordinated. During the early stages of the engagement, the CSM can use these regular meetings as a way to learn about the client's business, people, processes and technologies. Through these investigations, the CSM can often uncover opportunities for new projects and sales. For example, they may identify opportunities for adding more technologies to a monitoring service or instituting efficiency improvements that weren't included in the original project's scope.

The CSM should maintain regular communications with various staff members on the client side, including both the top decision makers and IT contacts. Through quarterly business reviews, CSMs can take the opportunity to pursue a more strategic engagement, interviewing the client on initiatives and plans in the customer organization, and determining if and how the service provider can help the business accomplish its objectives.

Ideally, through this type of ongoing interaction, the CSM may even start to be involved in the client's budgeting process, which can provide a range of insights and ultimately enable the service provider to help guide the client's planning and budget decisions.

The CSM's ongoing interactions with clients can be instrumental in helping the service provider stay on top of renewals. You don't want sales teams following up with renewal contracts, and only then find out about a laundry list of complaints and unresolved issues the client has. By staying engaged with the client and understanding when renewals are happening, the CSM can work proactively with the client to uncover any issues and ensure that these issues are addressed and that the client is satisfied—before the sales team broaches any renewal discussions. Further, by maintaining this level of engagement, the CSM will be helping to show value and build trust with the customer. For all these reasons, the CSM can help dramatically boost the chances of the client's renewal.

Over time, the CSM can continue to uncover additional layers of understanding of the customer's technical environment, and then continue to help the technical and support teams keep apprised of changes or intricacies they may not otherwise know about. For example, if an alarm is generated for an issue with a printer, the support representative that receives the initial alarm may assume the issue is a lower priority. However, the CSM may know that the specific printer in question is the only printer that supports several of the client's business-critical workflows. Based on this understanding, the CSM can alert the representative to that fact so the issue gets escalated. Similarly, the CSM will be familiar to the client organization's personnel, and know, for example, that a user that submits a ticket relating to a connectivity issue is a key decision maker that has budget approval authority. Given this insight, the CSM can ensure that the technical representatives involved understand the added significance of the issue and prioritize accordingly.

Conclusion

Ultimately, the CSM plays an integral role in helping build and sustain a solid, trusting relationship with the client's key contacts. Finding the right people to staff this role is critical, as is the need to give them the support and resources they need to fulfill their objectives. This is important, because, when the CSM succeeds, the client and the service provider can succeed.

For more information on the CSM role in the service provider organization, be sure to review these additional documents from the CA Service Provider Center of Excellence:

- **Strategy Brief: Building a Customer Success Team: Fostering Success for the Customer and the Service Provider**
- **White Paper: New Customer Onboarding: Understanding the Process, so You Can Manage it Effectively**

About This Document: Developed by the CA Service Provider Center of Excellence

This document has been written by the CA Service Provider Center of Excellence team and is intended to provide our service provider partners with the guidance they need to address some of their most pressing challenges. Our team has rich expertise in service provider businesses, strategic consulting, technical deployments, sales and marketing. Our documents are informed by the Center of Excellence team's extensive experience over the past ten years in helping build successful service provider businesses and by interviews with some of our most successful service provider partners. This document is provided for informational purposes only and on an as-is basis. The guidance and results described herein are based on the unique experiences of our staff and partners, and may not be applicable to all organizations.

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