

Leveraging a Software Development Tool TO IMPROVE CUSTOMER SUCCESS

Despite [over a decade of proven effectiveness in software development by companies like Groupon, Zappos, Dropbox, and Uber](#), the concept of Minimum Viable Product (MVP) has not yet been widely adopted by Customer Success leaders to build or expand their Customer Success operations. It's time to change that! Check out our blog post for reasons [why CS leaders should adopt an MVP approach](#), and keep reading for an outline on how to go about it.

Focus on Experience

The focus of a Customer Success MVP should always be the experience you and your team will be creating and providing for your customers. By 'experience' we mean the touchpoints the customer will receive (via digital communications or interactions with Customer Success Managers) and the timeline on which these touchpoints will occur. It also includes the various resources that will be made available to your customers, the actions or tasks you want your customer to complete, the processes you want your team to execute, and the overall journey you want to see your customers take as they engage with your company.

Whereas traditional MVPs have primarily focused on developing a new product or service, your CS MVP should focus on how to create a positive and valuable experience for your customers.

Operating Principles

Keep these four principles in mind as you work through the MVP process:

1. Establish a time frame
2. Remember what 'M' stands for in MVP when determining scope
3. If it can be done today, do it!...If not, concept it
4. Workability comes before scalability

Establish a time frame

Determine when your CS MVP process will both begin and end. A CS MVP process can typically be executed over a six- to twelve-month period, but this can vary. If you are simply focusing on one specific aspect of Customer Success or stage of the customer journey (e.g. onboarding), an MVP process could run for an even shorter period, say three months. Establishing a time frame allows you to identify a realistic scope and define a clear project plan to operate within.

Remember what 'M' stands for in MVP when determining scope

Many CS leaders struggle to build efficient CS operations because they try to address every applicable or potentially applicable aspect of Customer Success with their initial project. A major benefit to applying the MVP concept to the establishment of your CS operations is remembering that the 'M' in MVP stands for minimum. This means you only need to focus on the absolute must-have aspects of CS initially to have a successful CS MVP. Then you can gather feedback from both customers and internal stakeholders, which will shape your next steps post-MVP. As such, it's imperative that you determine a scope that is both minimal and realistic given the time frame you've established.

If it can be done today, do it!...If not, concept it

Another challenge facing CS leaders when trying to build up operations is the desire to have all collateral and deliverables completely finalized and ready to be fully deployed before launching their CS strategy. A monthly usage report that will be sent to a customer, for example, ends up not being sent because one or two of the usage data points are not yet available to be merged into the report.

Rather than tabling aspects of your CS operations, the MVP concept can create deliverables or collateral using resources that are available now. In other words, if it can be done today, do it! For those items that cannot be done today, we recommend creating concepts or mock-ups of what these deliverables will ultimately look like and the content they'll contain, along with capability schedules indicating how long it will take to be in a position to execute on these concepts. Remember, it's okay if not everything can be done today! Complete what you can right now and create concepts of the rest.

Workability comes before scalability

Often, CS leaders will approach the development of their CS operations from the viewpoint of whether or not a proposed strategy is scalable. While scalability is an important item to consider, the workability of a proposed strategy is arguably equally critical, and often overlooked. Does the proposed strategy provide the results being sought? Does it bring about other valuable outcomes? Does it increase the effectiveness of other related strategies? If a strategy does not meet these requirements, then scalability may be irrelevant. Be sure to check the workability box before moving on to scalability.

Vetting a strategy through your CS MVP will also serve as a proof of concept to confirm its workability, likely with minimal time, effort, and associated costs. If the strategy proves workable, then efforts can be shifted to scale. If not, the strategy can be modified or abandoned altogether.

How to Execute

Keeping the above-mentioned operating principles in mind, here are the steps we recommend to successfully execute a CS MVP:

Step 1: Analyze and segment existing customers

Assuming a substantial current customer base, we recommend starting your CS MVP process by analyzing your customers and [identifying the customer segments that make the most sense for your business](#). Beyond segmenting based on the size of the customer (e.g. small business, mid-market, enterprise), additional segmentation could include the number or type of subscriptions customers have, existing revenue commitment, renewal revenue potential, churn risk, available customer information, current level of engagement, etc.

Segmentation will shape how many different customer journeys you will need to create (as the journey for one segment will look different than the journey for another segment), so keep this in mind when determining the number of segments you identify and define. If you find yourself with more than three or four segments and are unable to combine them, we recommend selecting a limited number of segments to include in your CS MVP and leaving the rest as a post-MVP project.

Segmentation will also shape the types of touchpoints that each segment will engage with as part of their respective journey. For example, low revenue customers may primarily receive digital touchpoints, whereas high revenue customers may primarily receive human (or CSM) touchpoints. [Determining the right balance of high-touch and tech-touch](#) is complex, but when done thoughtfully, can significantly improve your customers' experience.

Another benefit of analyzing your existing customers is the ability it provides to identify baseline metrics to compare your MVP results against. For example, how long does it currently take a customer to complete your onboarding process? To what degree are customers participating in regularly scheduled reviews? What is the current renewal rate? Knowing what is happening today with your customers not only helps to shape where to focus your CS MVP, but will also help demonstrate the effectiveness of that MVP upon its completion.

Finally, segmenting your existing customers can help you determine the resources you will need as part of both your CS MVP and your overall CS strategy. For example, if you were to divide your customers into two segments (a digital-only segment and a digital-plus-CSM segment), and the digital-plus-CSM segment contained twice as many customers as the digital-only segment, then you would be able to direct your efforts towards determining how many CSMs you will need in order to execute the digital-plus-CSM strategy you are looking to implement.

Step 2: Create a customer journey map for each customer segment

Traditionally, most customer journey maps will be broken down into the stages defined in your customer lifecycle. We typically utilize a [five-stage Customer Success Lifecycle](#), but this may need to be adjusted based on your business model. Depending on the stages you've identified to include in your CS MVP scope (you could be focused on just one stage or multiple stages), your next step is to identify:

- The timeframe for each stage. For example, onboarding could run from day 1 to day 30, adoption from day 31 to day 274, and renewal from day 275 to day 365, allowing a 90-day renewal timeframe.
- The touchpoints you want each stage to include. Onboarding might include a welcome message, instructions on how to access available resources, and an invitation to engage with a Customer Success Manager (CSM).
- How you will determine customer health. How will you assess whether customers are doing well or are struggling? For example, during onboarding you may monitor whether the customer has participated in training or finalized their system installation or configuration.
- How to address negative indicators. What steps will your CSMs take to address a customer who hasn't participated in training; who hasn't been participating in regularly scheduled review meetings; who hasn't engaged with a renewal rep? etc.
- How one portion of your journey transitions into another. Once a customer has completed onboarding, how do they move smoothly to adoption? Processes should be clearly outlined and may include activities that span multiple journey stages to help with continuity.
- How to measure success. In addition to identifying the KPIs and metrics for each portion of the customer journey, you will also want to determine the tasks that must be completed (by both the customer and by your CS team) in order for a customer to exit one stage of the journey and enter the next. These then become your exit criteria.
- How to collect feedback from your customers. What surveys do you want to include in the customer journey and which segment(s) should these surveys go to? Gathering customer feedback is critical to not only evaluating the effectiveness of your CS MVP, but also in identifying the modifications which need to be made post-MVP.
- Pro tip: make sure that surveys ask the right questions at the right time. For example, if you want feedback on how easy (or difficult) it was for a customer to complete the onboarding process, send that survey right after the customer has completed onboarding so it's fresh in their mind. Don't wait until they're up for renewal and expect them to have a clear memory from many months prior.

Remember, you and your CS team are defining the experience you believe your customers should have in order to receive value from – and be successful with – your product or service. As such, we highly recommend bringing your entire team together to brainstorm the ideal customer journey. Engage key internal stakeholders and leadership to determine if they have specific requests or recommendations.

Step 3: Identify and review existing resources

Now that you've determined what you want to include in each stage of your customer journey map(s), it's time to identify the resources that are currently available for you and your team to utilize. These resources may include:

Digital Resources

This category encapsulates not only the messages you are looking to send customers, but additional content you may need to further educate customers as well. Maybe it takes the form of a resource library, FAQ documents, training manuals, or something entirely different. Even value-driven content pieces like blog articles could fall into this category.

Some of these digital resources may already be available to you. For example, for the onboarding stage of your customer journey, your organization may already have a welcome message that is sent to all new customers. If so, you'll want to review the existing message to see if it aligns with your new onboarding process. Likewise, educational or instructional materials may be available from your Support or Education departments, and value-driven content may be available from your Marketing department.

The key takeaway here is, just because digital resources don't already exist within the Customer Success department does not necessarily mean they don't exist within the organization at large. So look around and ask questions throughout the organization to avoid duplication of work or conflicting information for customers. Plus, it is much easier and less time-consuming to modify an existing resource than to create one anew.

Technology Resources

This may include a Customer Relationship Management (CRM) system, a Customer Success tool, marketing platform, data analytics/reporting system, internal CS team collaboration tool, among others.

Sometimes, the capabilities associated with each of these resources can be found in one comprehensive system. Other times, one or more of these technological resources can be integrated with each other so that information flows from one resource to another.

Should you find yourself in a position where you have limited technological resources available, there are two routes you can take. First, you can attempt to perform the functions you need manually. Yes, this is time and labor intensive. But, in the end, if this effort proves valuable, the case can be made to invest resources in the technology needed to scale this effort later.

Second, you may need to shelve an aspect or two of your initial CS MVP until the technology is available. Keep in mind, though, that this doesn't mean you're shelving the whole CS MVP. Continue to move forward with other aspects that can be done today and revisit the shelved items frequently. Also, for each item you shelve, be sure to include a concept of what you're looking to achieve (and, if applicable, a capability schedule) in your final CS MVP.

Human Resources

Do you have the right people to create and execute the various touchpoints, tasks, and actions included in your MVP? Do you have enough CSMs to manage the customers who will be included? Do you have someone with the expertise to write and design your various digital touchpoints? Do you have someone who can configure existing technology resources to deliver the functionality you are looking for?

You may not have all the human resources you'd like. If that's the case, find out if existing team members have prior experience in the areas you need assistance with, or if other teams within your organization can lend a hand. Perhaps your Marketing team can assist with some of your digital communications, or your Support or Training teams can assist with instructional materials.

More often than not, CS leaders find themselves in the position where not every resource needed is readily available. This is where you'll need to get a little creative, and remember the 'M' in MVP. If the resources are not readily available for one or two aspects of what you're looking to achieve, these aspects can be shelved without taking away from the overall value or success of your CS MVP.

Step 4: Create your project plan

At this point in the process, you have identified the scope and timeframe of your CS MVP. You have also segmented your customers and have created the applicable portions of your customer journey map(s). Finally, you have identified the resources you need, and which are readily available, need to be modified, or need to be created (or secured). Well done! Now it's time to create your CS MVP project plan. Here are the basics and some recommendations to get you started:

1. Document the segments and customer journey maps(s) you've already created and the process you went through to develop them. A portion of your final CS MVP should include all processes you went through as well as the overall output of your efforts. Since this is work you have already completed, you have immediately made progress on your project plan. Congrats!
2. Create your 'epics' or sub-projects. If you only have one segment of customers you have created an overall customer journey map for, we recommend treating each journey stage (e.g. onboarding, adoption/maintain, renewal, etc.) of your customer journey map as its own sub-project (or '[epic to use Agile Project Management terminology](#)') in the overall CS MVP project. In other words, onboarding is an epic, adoption/maintain is an epic, and renewal is an epic. Each of these epics will include a journey map for that particular portion of the customer journey, the applicable playbook(s), all process and materials, and the applicable measurements of success (e.g. health score, exit criteria, and KPIs/metrics). If you have multiple segments you have created customer journey maps for, you will want to create one epic for each segment within each portion of your customer journey map. For example, let's suppose you have a digital-only segment and you have a digital-plus-CSM segment. You'll create one onboarding epic for your digital-only segment and another onboarding epic for your digital-plus-CSM segment.
3. Create a repository epic. A repository is where you will store all documentation and visuals related to your CS MVP. As such, an important task on your CS MVP project plan will be collecting these materials and ensuring that they are stored in one location.

Once you have defined your epics and have outlined all of the tasks you want to accomplish for each epic, it is time to determine the team members for each epic. Each epic should have an 'owner' to ensure that the entire epic is progressing towards completion and to break ties should there be differing opinions as the list of tasks is completed. Likewise, every task needs an owner as well (this can be the epic owner or another team member). Finally, there should be timeframes associated with both the epic and its applicable tasks.

Step 5: Execute your project plan

With your CS MVP project plan developed, it's now time to begin executing! We strongly recommend that you conduct a CS MVP project kick off meeting that includes all involved parties. Following this meeting, each epic team should conduct separate epic kick off meetings for their respective epics. Yes, this will mean there are several meetings taking place at the front end of the project, but this is time well spent ensuring everyone is on the same page on ownership, deliverables, and timeframes.

Once your CS MVP project has 'officially' begun, regular status update meetings for both the overall CS MVP project and the individual epics are valuable. These meetings will be much shorter and more concise than the kick off meetings. For the overall CS MVP project, the host for this meeting (usually the overall project owner) will quickly review the progress that has been made on each epic, and towards the project as a whole. Likewise, for the epic meetings, each team member will provide a quick update on the actions they have completed, and what they will be focusing on next. There should also be time for team members to ask for help on any actions they're stuck on or anticipate needing an extra set of eyes on in the future.

Your meeting cadence will depend on the timeframe of your CS MVP, but in our experience, a schedule that includes weekly overall CS MVP project meetings and bi-weekly (as in twice per week) individual epic meetings is a good place to start.

Step 6: Summarize the results

While summarizing the results of any project tends to go without saying, it is important to structure your summary in a way that clearly demonstrates the success of your CS MVP. For example, be sure to point out what was happening with customers before you embarked on your project. What did your CS operations consist of? How many customers were successfully completing onboarding? What was the adoption rate for customers and how many customers in this segment of the journey were moving forward with appropriate up-sell opportunities? How many customers were renewing? Your MVP likely won't move the needle in all of these areas, but customer experience in one stage of the customer journey often impacts later stages as well ([hello leading and lagging indicators](#)), so we recommend measuring results in as many areas as possible.

Additionally, be sure your summary includes a step-by-step view of how you analyzed and segmented customers. Don't forget a description on why you chose specific engagement strategies for each segment. The customer analysis and segmentation information you include here will help set the stage for the remainder of your CS MVP summary as it helps explain why each portion of your customer journey map(s) and their applicable playbooks were designed the way they were.

When presenting each portion of the customer journey map, we like to include both a visual representation of each portion along with the respective playbooks. The playbooks are where you get to showcase not only all of the materials, processes, and actions that you and your CS MVP team have developed, but also how these items have helped guide and improve the overall customer experience. A summary of the KPIs/metrics, health score, and exit criteria for each portion of the customer journey should be included as well.

Finally, you'll want to showcase the results of your CS MVP by comparing the statistics you have been tracking against the statistics associated with what was happening with customers before you embarked on your project. This will enable you to point to specific improvements you've made. Likewise, you'll want to include the customer feedback you've received to outline how your project impacted overall customer satisfaction and experience.

Remember, your CS MVP summary is there to help you [build a business case for the additional resources you'll need](#) to take the next step. Maybe that means gaining additional stakeholder support for future CS MVPs or a larger CS engagement strategy as a whole. Keeping this purpose in mind, we recommend structuring your summary in a way that clearly demonstrates the work you and your CS team have done and perhaps even more importantly, the impact this work has had on both your customers and your organization.

Step 7: Repeat

Use the collective information and feedback (from customers, from your CS team, from key stakeholders, etc.) from your first CS MVP to identify what items you want to tackle in your next CS MVP. This is one of the best things about adopting an MVP strategy for your CS initiatives: you can repeat the process over-and-over again, working with the resources available to you, until your ultimate CS vision has been achieved.

Implementing a comprehensive CS strategy does not have to be an impossible undertaking. It doesn't have to require unlimited amounts of time and budget. It will certainly take focus and discipline, with a little bit of creativity and compromise. By breaking your larger goals into smaller components and then tackling each component with a CS MVP approach, you can do this! Should you need any assistance, we are here to help!

Good Luck!