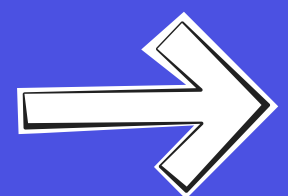


Staircase AI Survey Reveals:

The Reality Behind CS Playbooks

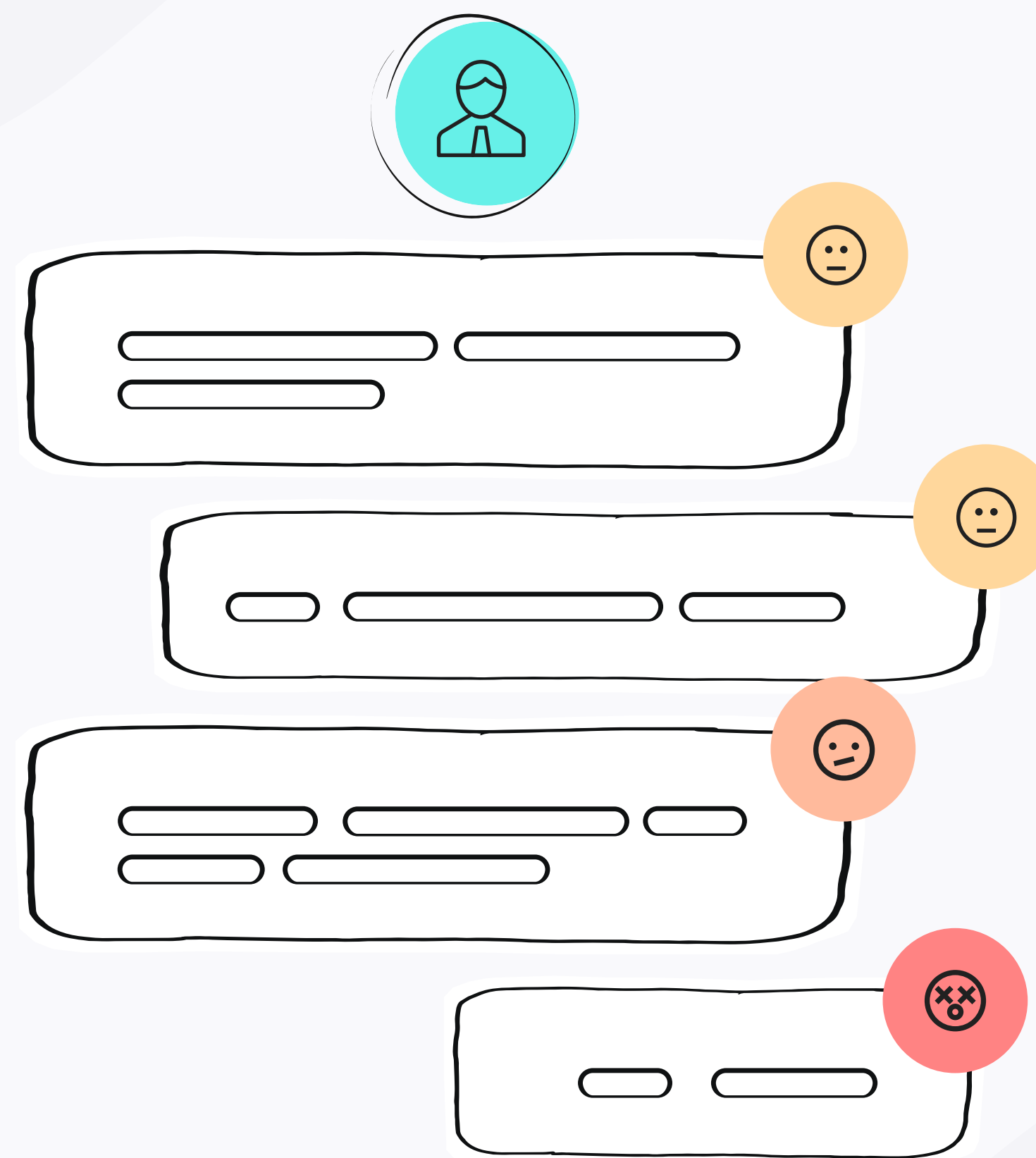


Customer Success has Come a Long Way

Following the B2B SaaS evolution, CS platforms were first introduced into the market 15 years ago, showing great promise.

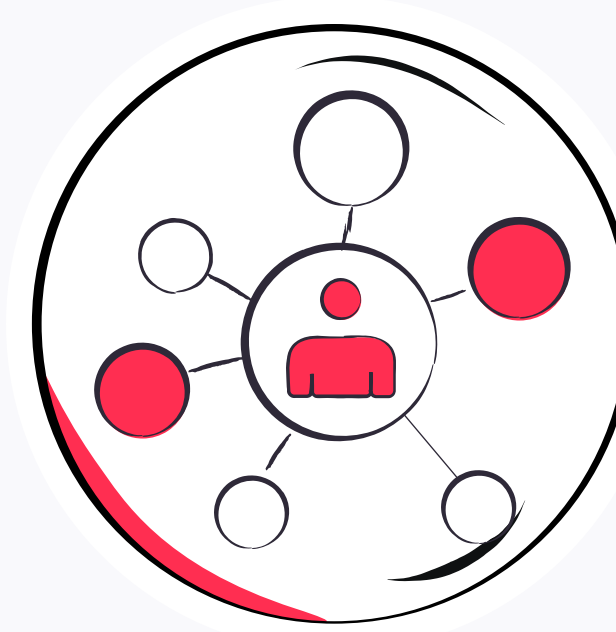
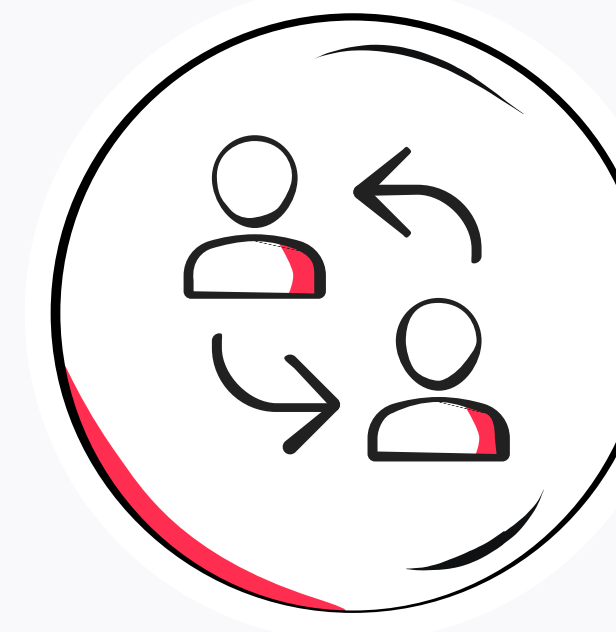
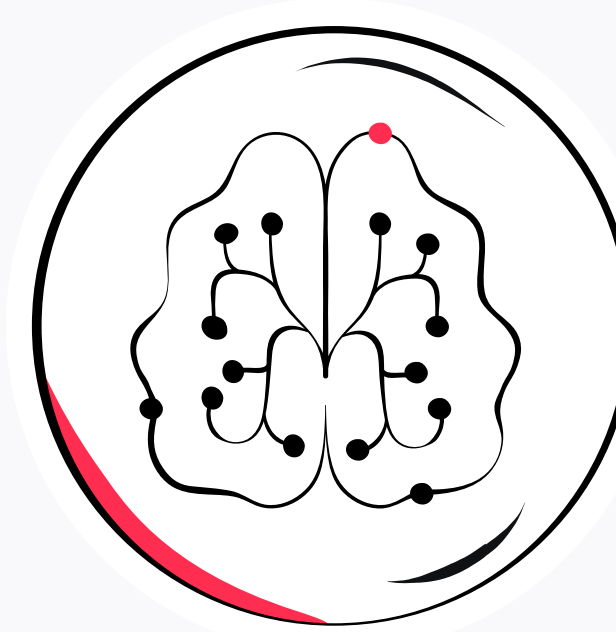
Fast forward to 2023 – today’s changing market revolves around Customer-Led Growth and Product-Led Growth (PLG), both of which require focuses on the user experience and delivering high customer value. B2B businesses have learnt that retaining and growing customers are crucial to business growth and success, as much as gaining new customers.

That said, **only one third of CS teams choose to use CS platforms.** We conducted this survey to help shed some light on why Customer Success teams are struggling to adopt those technologies.



Key Findings

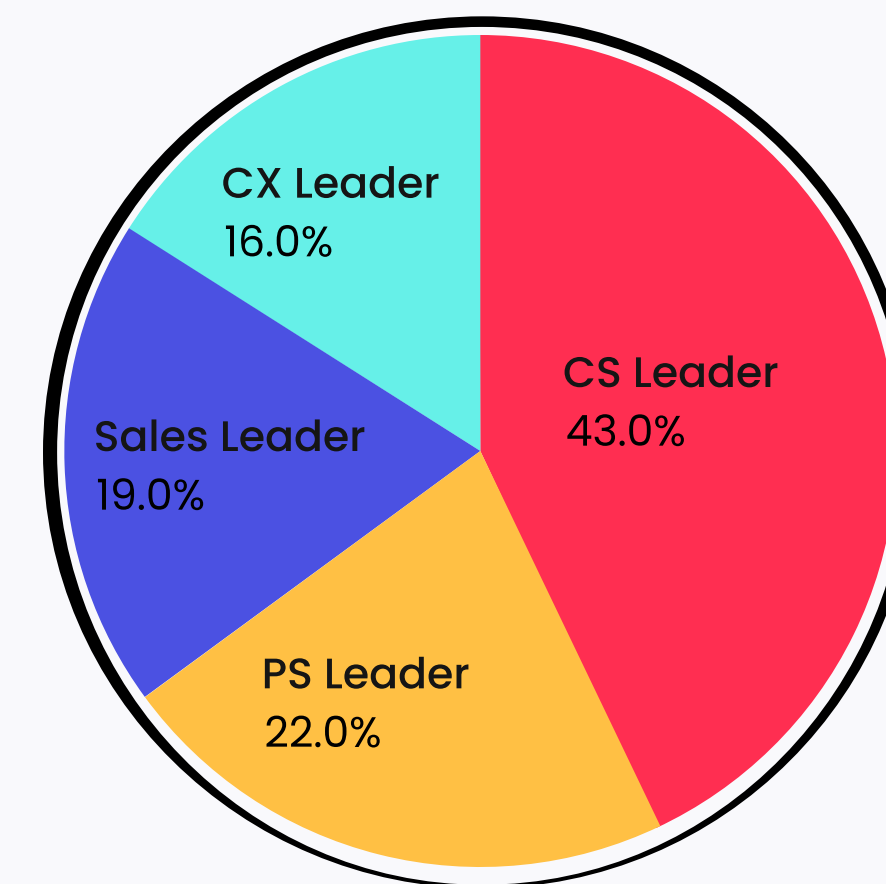
- Despite the availability of multiple CS platforms, CS leaders are still looking for better solutions for managing their customer accounts.
- Almost half of the B2B businesses today are still using project management tools to implement their CS playbooks.
- More and more CS leaders and teams are finding their playbooks to be partially or totally inaccurate when constantly used.
- AI can help companies trigger playbooks that are far more accurate and far less dependent on manual processes and CRM data.
- The newly launched AI-responder leverages unbiased customer signals and shortens response or outreach times by up to 50%.



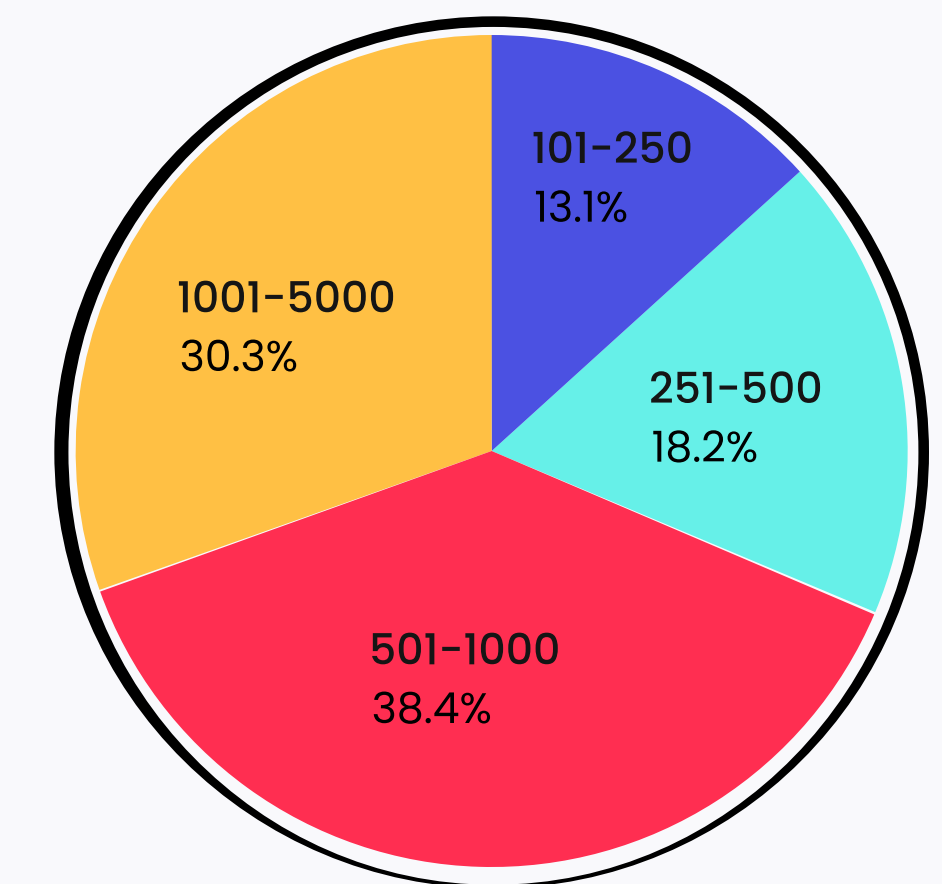
Who answered our survey?

- **The Target Audience** - 43% of the respondents were Customer Success Leaders, with CX Leaders taking up 16% of the share. 22% of the participants were Post Sales (PS) Leaders, with Sales Leaders completing the list with 19%.
- **The Companies** - 31.3% of the responses came from executives that are currently working in SMBs with up to 500 employees. 68.7% of the replies were from companies with more than 500 workers.
- **Geolocations** - The main focus of the survey was North America and Europe. 47% of the responses were collected from US-based companies, with another 44% coming from the United Kingdom. Canada and Germany came in at 4% each.

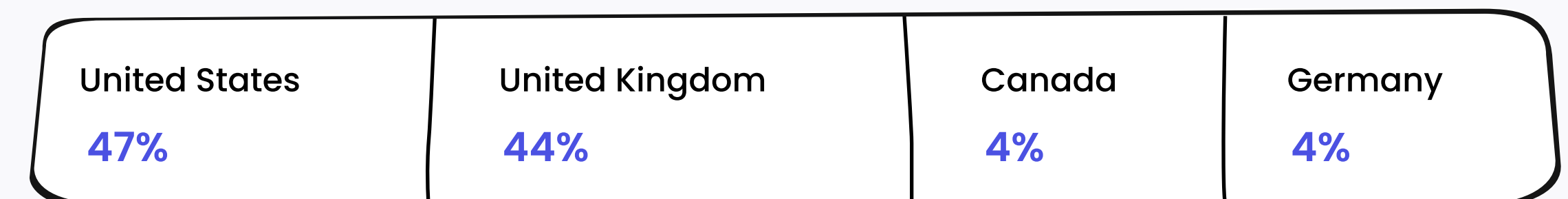
1. 175 Post-Sales Executives



2. Company Sizes



3. Locations

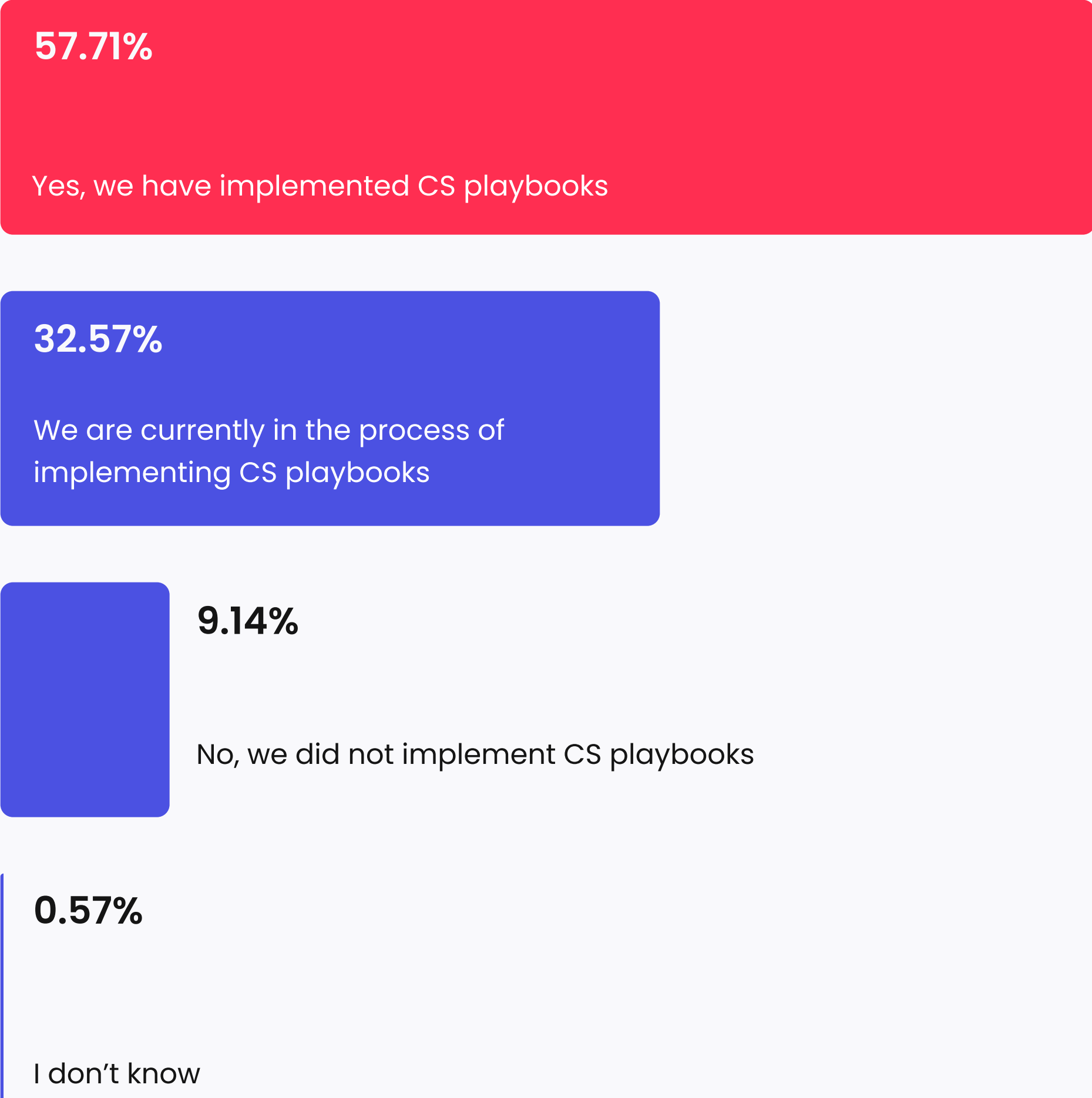


CS teams need a (*better) solution

82% believe CS playbooks are absolutely needed...

- CS playbooks are here to save customer success teams.**
When asked about the importance of having CS playbooks in place and using them, an overwhelming majority of respondents (82%) voiced their strong belief in the concept. However, things are not as straightforward as they seem.
- Implementing CS playbooks has become the norm.**
These statistics backed up the results of the previous question. 58% of the respondents claimed that they already have CS playbooks in place, with another 32% confirming that they are currently in the process of implementing them.

Q2. Does your organization use Customer Success Playbooks?



CS teams need a (*better) solution

62% claim their CS playbooks are inaccurate or irrelevant, **wasting CS teams' time.**

- **So why are CS playbooks inaccurate or irrelevant?**

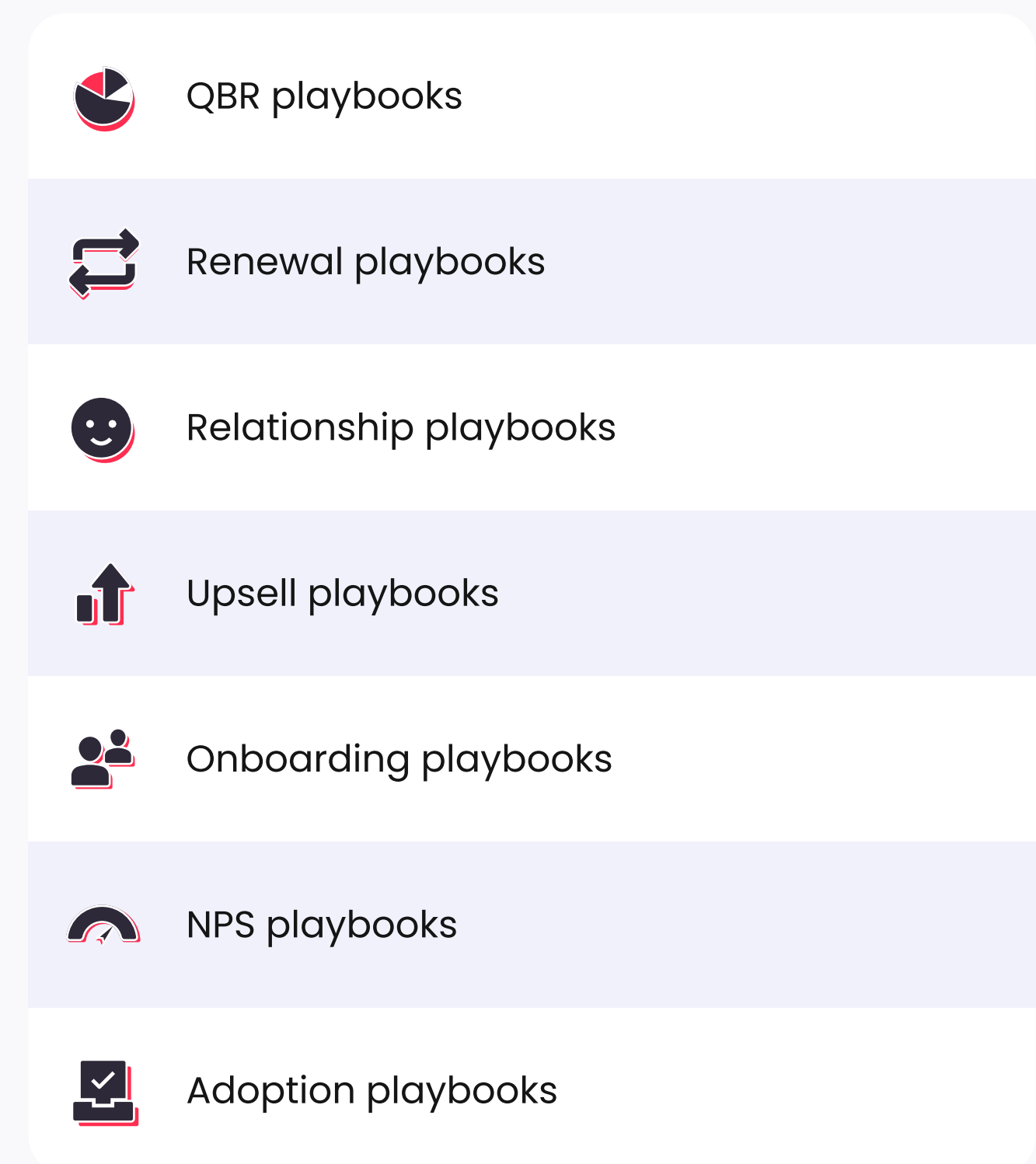
The follow-up question showcased a glaring problem. While the importance of CS playbooks is not in question, almost two thirds of respondents (62%) currently feel that their playbooks are not serving the purpose due to various reasons.

Q4. How strongly CS playbooks are actually used by the CS organization?



- We don't have such a playbook / I don't know
- It's hardly enforced
- It's partially enforced since most tasks are irrelevant
- It's partially enforced since some tasks are irrelevant
- It's 100% enforced

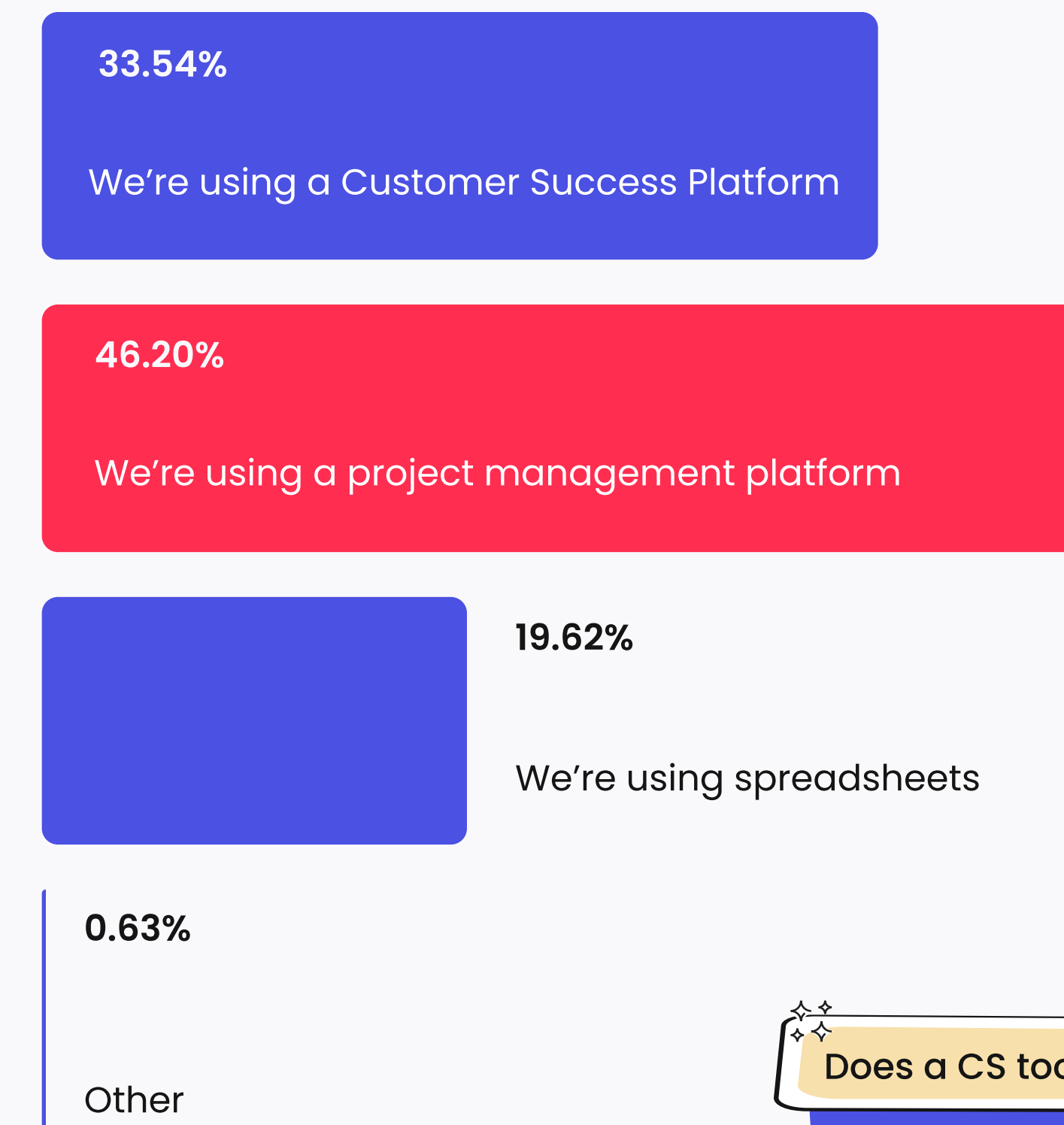
The **most used** playbooks are...



Current CS Platforms are barely moving the needle.

- CS Platforms are less common than you may think.**
 Only 33% of the surveyed executives admitted to having a CS platform in place. Almost half (46%) are implementing their CS playbooks with the help of task management tools. 20% are still doing so manually with spreadsheets.
- Startups and SMBs are taking their time with CS Platforms.**
 Our research also clearly showed that CS Platforms are currently being used by enterprise-level businesses. The smaller the business, the more likely it is to opt for manual ways of implementing CS playbooks due to financial constraints.

Q2. What tools are you using to enforce Customer Success playbooks?



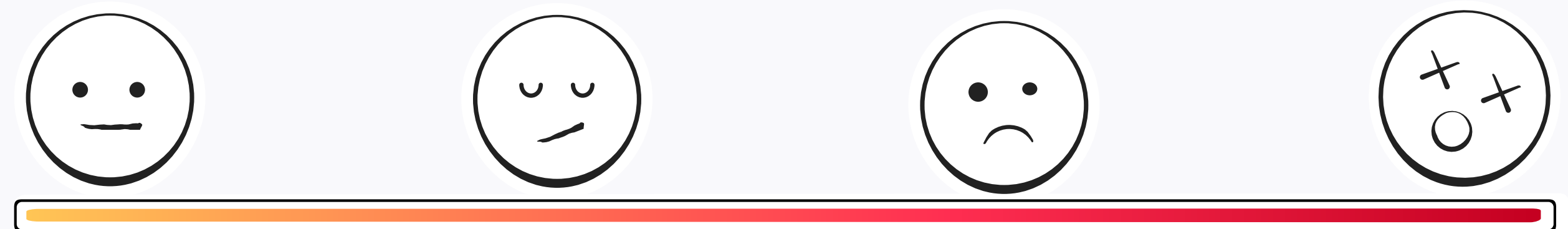
The bigger the company, the more likely they purchased a CS platform.

Does a CS tool make an Impact?

Based on the survey results, CS Platforms Improve Playbook Accuracy Only By 10%.

CS Playbooks: The Shortcomings

- **Low task accuracy** - When more and more irrelevant or outdated tasks pile up, they start creating noise. When this becomes the norm in the task funnel, CSMs simply start ignoring these signals, even when they are actually relevant. This results in lower adoption rates of CS platforms and lack of adhering to the playbooks. Task accuracy has a direct impact on productivity and efficiency.
- **Dependence on CRM platforms** - Your CRM has data about your prospects, customers, and subscriptions. But with the frequent changes in customer relationships and account details, it's becoming very challenging to keep CRMs updated manually. When the data isn't synced properly or if there are manual errors, the wrong playbook may be triggered.
- **Customers-to-CSM ratios** - Moving to a 1:many model in most companies has amplified the aforementioned problems. CSMs are asked to handle more tasks when the business is scaling up fast, a huge problem when using task management tools or spreadsheets. They simply don't have enough time to do what really matters - strengthen relationship and spot growth opportunities.

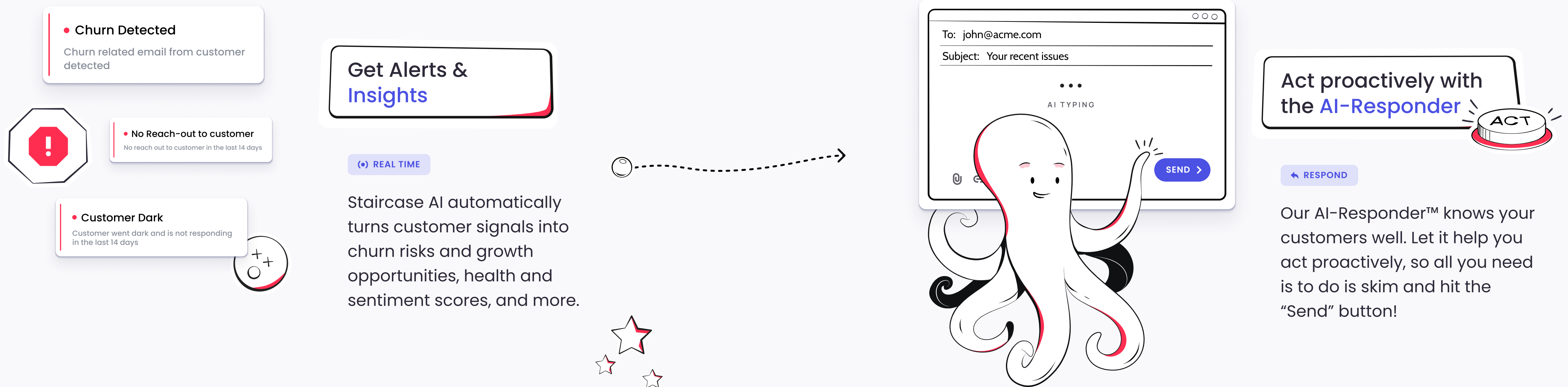


Time for Customer Success 2.0

Staircase AI Combines AI Customer Analytics with generative AI to build the first AI-Responder

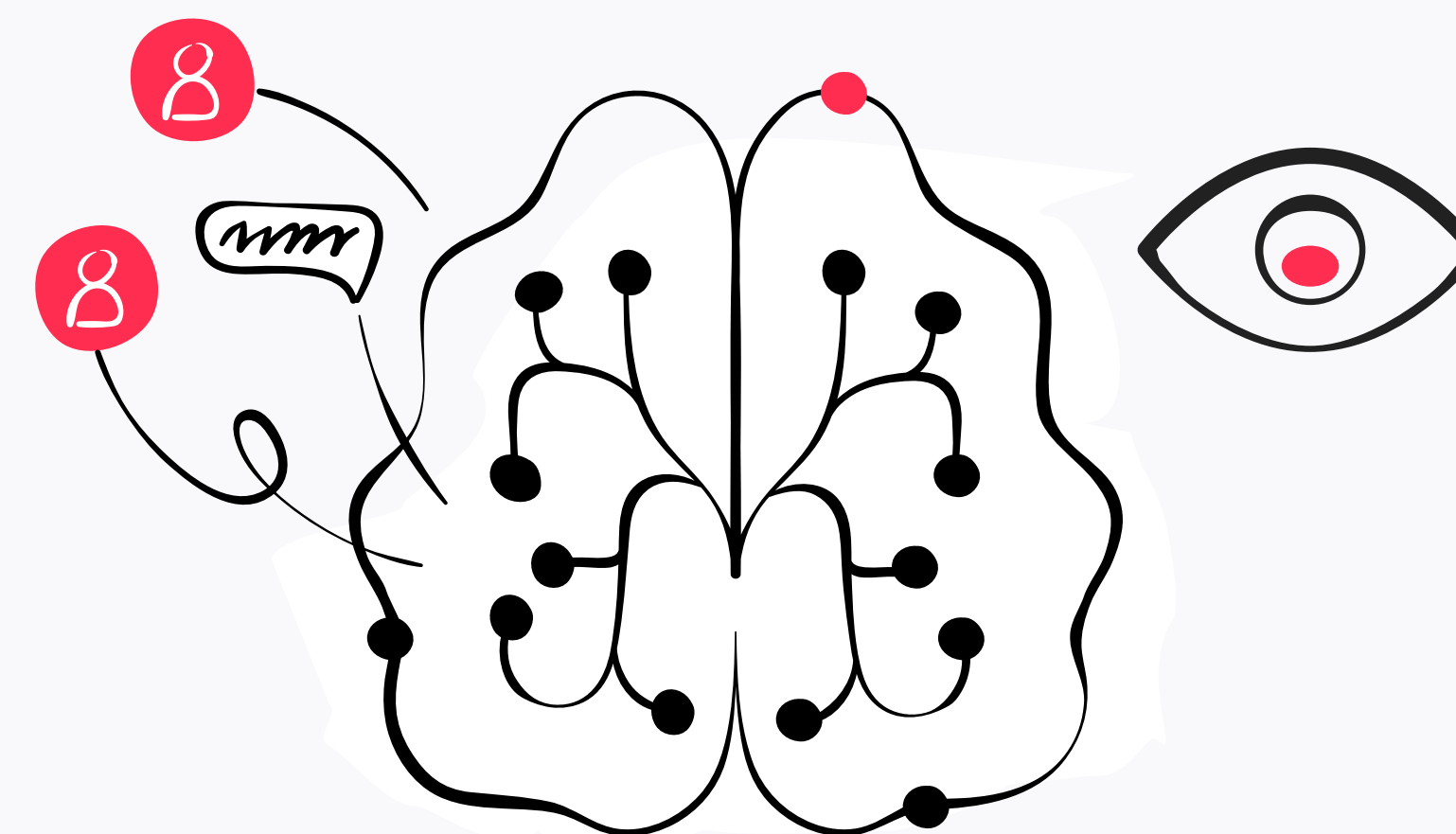
Staircase AI has now launched Customer Success 2.0.

Improve your playbooks accuracy by using AI-powered insights, and your teams' productivity using generative-AI fueled with previous customer knowledge. Combine AI-powered customer analytics insights with cutting edge Generative-AI to produce emails, responses, and more content, always in the right context.



Time for Customer Success 2.0

- **Automated customer intelligence** - Staircase AI's cutting-edge AI-powered customer analytics analyzes millions of customer-vendor communications - emails, chats, calls, product usage, and more, to track real-time sentiment drops, relationship changes, churn risks, and growth opportunities.
- **Proactive AI-Responder** - Staircase AI has now embraced the ascending Open AI technologies to create an advanced Generative AI response solution for customer-facing teams. The power of our AI-Responder is previous knowledge of the customer and customer events, helping it craft personalized responses that are always in the right context.



Final Thoughts

Our survey has painted an interesting picture. Post-sales leaders are facing numerous challenges in 2023 - the ongoing recession, scaling up fast with limited manpower, demanding customers, and increased competition just to name a few. While the importance of customer success playbooks is clear to all, there are many loopholes and blind spots that are blocking their implementation.

The bottom line is that CS teams need to be efficient, proactive, and productive. The power of AI is helping achieve just that. With over half of CS leaders (53%) finding CS platforms lacking it only makes sense to join the Customer Success 2.0 revolution. Accurate, proactive, and efficient teams will be the biggest CS winners in 2023 and beyond.

Harvest the Power of AI to act proactively towards Customers' Churn Risks and opportunities.

[Talk to our experts](#)

