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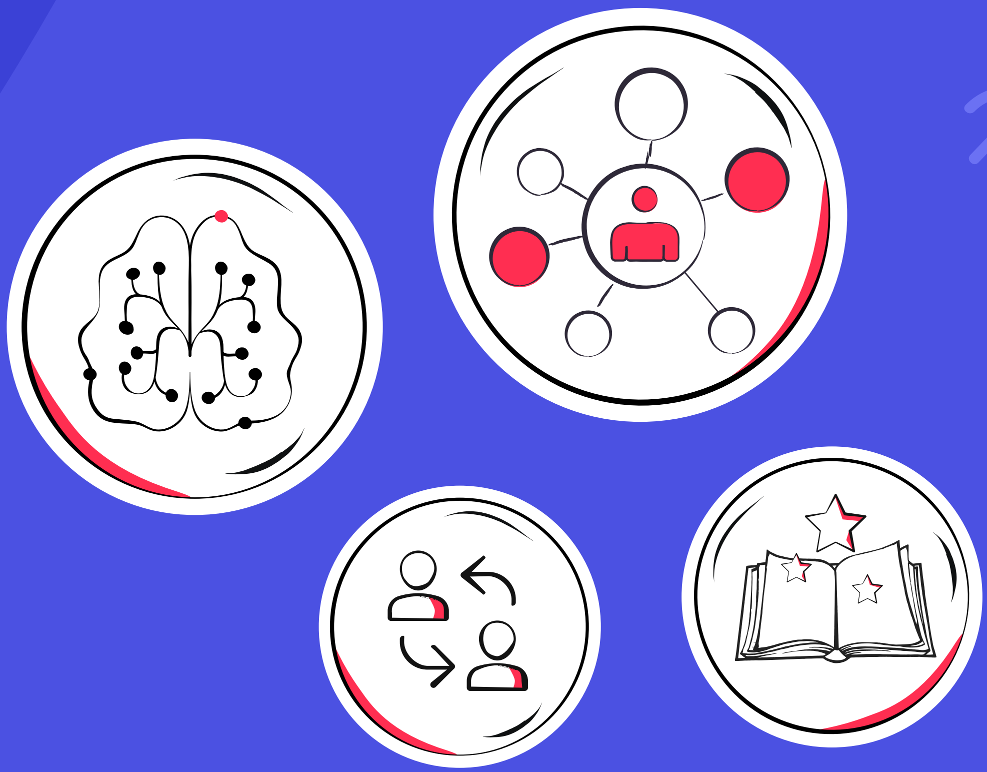
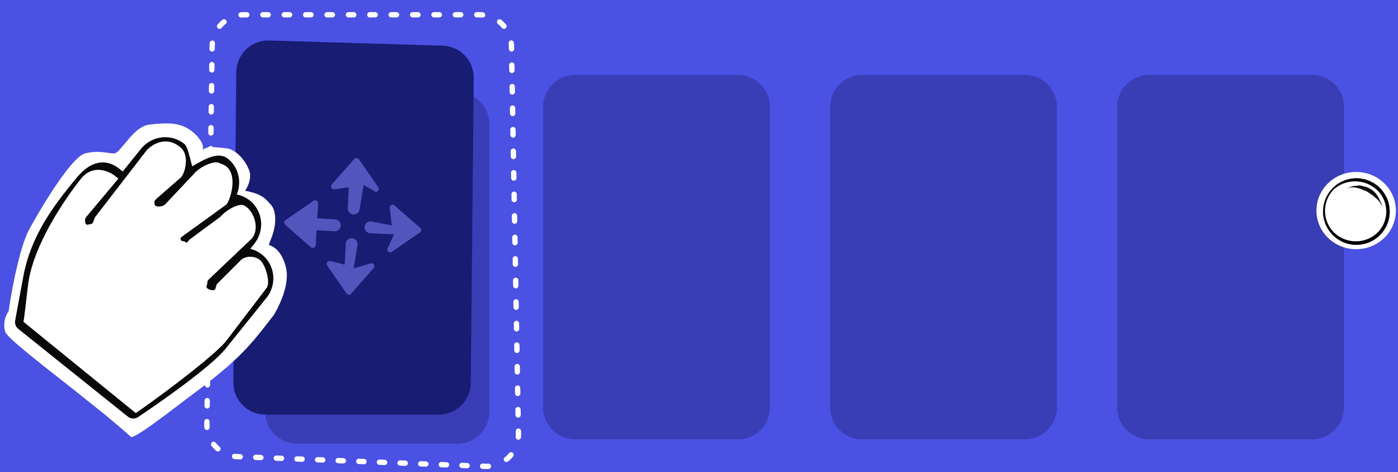
The Complete Guide to Building Your Modern Customer Success Stack





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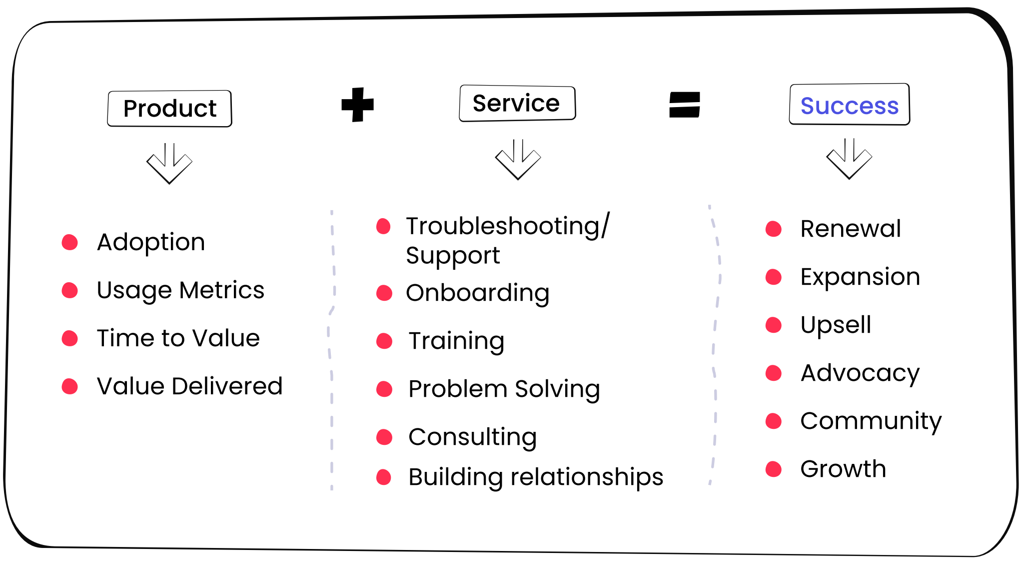
Warning: Your CS Tech Stack May Need an Uplift

Product analytics solutions and customer feedback tools have made life easier for post-sales teams. But with use cases becoming more complex, communication channels multiplying, and customer requirements clogging support pipelines, CS leaders now need to break down siloed data faster with the right tools. These tools can help you create the right CS stack to enable teams and drive growth.

The voice of the customer (VOC) needs to be heard and acted upon for reduced churn and detection of growth opportunities. In today's uncertain times, more and more companies are adopting a customer-centric approach and using the VOC as the main tool to fight churn and detect new growth opportunities.

This guide will help you create a modern CS tech stack to address your needs and create a robust post-sales lifecycle. You'll need these tools to keep customers happy and make sure they are engaged for optimal retention rates. As you'll see in this guide, this can be done by fortifying the 4 pillars of the CS structure. You can then build and nurture customer relationships to generate trust and brand loyalty.

As you can see in the equation below, you simply can't get the job done without analytics. Once you have your user metrics and other key adoption indicators, you'll need to provide the relevant services - onboarding assistance, training and problem solving. This will help you build healthy relationships and achieve sustainable growth by increasing renewals, upselling, and advocacy.



1. The SaaS Success Equation

The Main Challenges (And Best Practices)

Most CS leaders and business decision-makers are aware of the fact that they need a better data-driven approach to achieve sustainable growth. But there are many roadblocks on the way, regardless of the nature of the business.

Here are some key challenges that post-sales professionals are facing today while building their tech stacks:

1. Stacking Up Tools with No Strategy

With so many businesses scaling up (or down) exponentially in short time periods, CS leaders are finding it hard to plan ahead. This means that there is often no real framework of requirements, nor are the needs documented to make decisions based on the bigger picture. Furthermore, there is no single source of truth because data is siloed (multiple data streams) and business alignment is often non-existent.

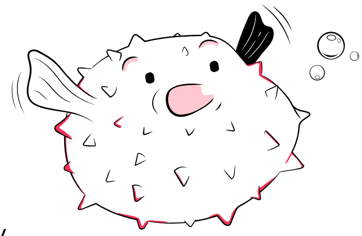
Pro Tip

The North Star Metric is a great way to align CS and post-sales teams and make them move towards a primary business goal. Connect your business goal/s with ongoing achievements and attribute them to the right personas for best results.

North Star Metric Examples

Facebook	Monthly Active Users (MAU)	WhatsApp	Messages Send
Spotify	Time spent listening	Quora	Number of answers to questions
amazon	Number of purchases per month	Uber	Rides per week
airbnb	Booked nights	HubSpot	Daily Active Users (DAU)
LinkedIn	Monthly Active Users (MAU)	Slack	Weekly active teams

2. Too Many Platforms with Overlapping Functionalities



With businesses going online also comes the adoption of third-party solutions. More often than not, you can have multiple solutions with parallel features. For example, you can help multiple tools that can send out NPS emails. Which one should you use? Which one is better with engagement tracking? Teams often use multiple platforms with overlapping functionalities, leading to technical debt or incomplete data, and eventually to poor results.

Also, SaaS apps and services create blind spots on many levels - operational issues, data harvesting, implementation hiccups, information sharing, business alignment, and more. Integrations are also common roadblocks, as are onboarding and training issues when the business starts scaling up. Visibility issues arise as CS teams get overwhelmed with heaps of data flowing in from multiplying sources.

Best Practice

Document and define what each application is doing (Saleforce for CRM, Zendesk for support, etc.) and remove redundant ones as soon as possible. Pay extra attention to overlapping capabilities and mark down your choices.

	Tool #1	Tool #2	Tool #3
Requirement #1	✓	✓	✓
Requirement #2	✓	✓	
Requirement #3	✓		

2. Put your requirements against your tools

3. The Human Factor

You may have the best team possible, with talented and experienced CSMs and professionals. Unfortunately, everybody makes mistakes. This is true for every group, but especially for CS teams because accounts are constantly changing and data is coming in from multiple communication channels and teams. The bottom line is clear - automation is now the call of the hour.

Customer Success and Post-Sales leaders must prioritize automated solutions that eliminate (or minimize) human intervention, provide real-time monitoring, and come with notification capabilities.

Teams then should be constantly trained and educated on how to use them.

Pro Tip

You have limited resources and the clock is always ticking. Start off by automating what is possible and educating your team. Move on to visualizing customer journeys and understanding where to concentrate your efforts.

4. Inaccurate and Siloed Data

Last but not the least, you have the data. Data-driven strategies require accurate and up-to-date data. Is this always the case? More often than not, leaders and teams have to deal with multiple inconsistencies and format irregularities. This is specially the case with human feedback and customer feedback, which is also often subjective, incomplete, and outdated. This is one of the biggest challenges today.

Things get complicated when you have to track multiple dashboards on a daily basis. Is the data updated? Can you generate accurate insights? What are the unresolved issues and who is prioritizing them? Too many unanswered questions.

Pro Tip

Having the best automation team is useless if data is not manually updated in most cases. You need to make sure that all customer data is being processed in real-time so you can generate unbiased and accurate insights.

Is your current tech stack enabling that for you?

Building a Bulletproof CS Tech Stack

Step #1
Analyze

Step #2
Act

Step #3
Engage

Step #4
Educate

The modern CS tech stack needs to be a well-planned blend of analytics tools, operation solutions, community platforms, and knowledge software, essentially helping you get high-quality bi-directional feedback from customers to you, and from you to your customers. Not addressing even one aspect can lead to a broken post-sales lifecycle and redundant churn.

Here are the four main pillars of the modern CS tech stack:

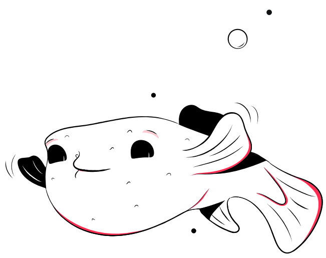
Step #1

Analyze what your customers are saying, feeling, and doing

Before even starting working on this pillar you need to understand your customer and know the answers to some key questions: What are their main concerns? How are they feeling? How do they use your product? What features are not being used?

This key component of your stack needs to have the obvious product analytics tools to monitor and visualize current usage patterns, while also providing crucial behavioral data to reduce friction and optimize the customer experience.

You'll also need to pick a capable Business Intelligence (BI) solution that you can establish that coveted "one source of truth" to cut through the noise.



Product usage and Bi are great, but CS teams also need to dig deeper to understand customer sentiment. They need to be on top of behavior fluctuations and customer text communications across the various channels. This ability of tracking, breaking down, and acting upon these underlying human signals is what is making customer success operations so efficient today.

- **Product Analytics**

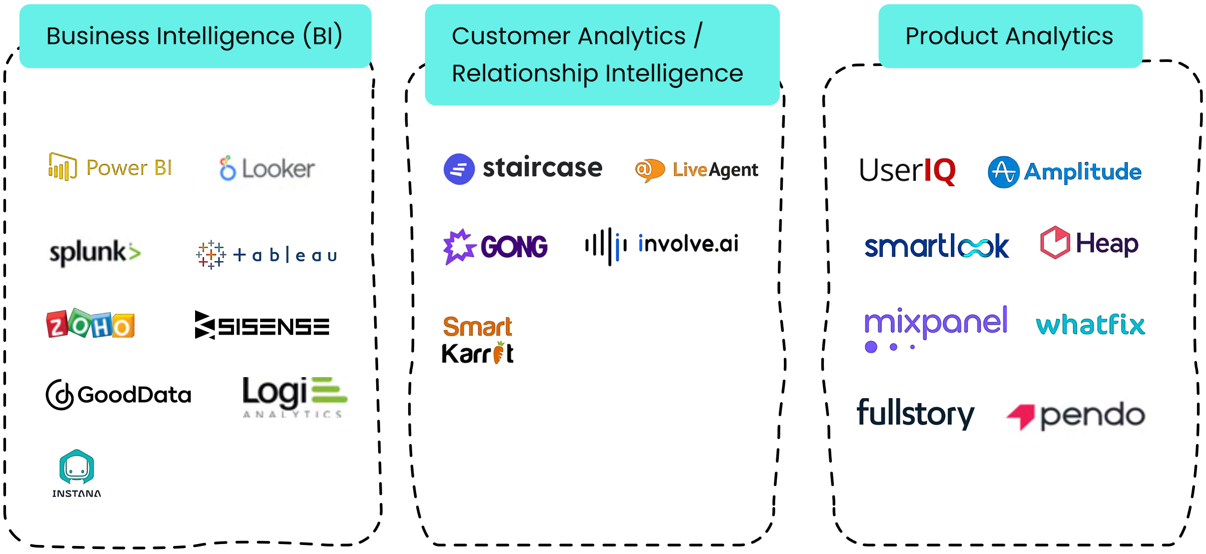
Product analytics tools, also known as usage analytics solutions, help understand how customers are currently engaging with the application or online service. These tools give businesses the ability to monitor and visualize the current usage patterns, while also providing crucial behavioral data to reduce friction and optimize the user experience.

- **Customer Analytics & Relationship Intelligence**

The most overlooked aspect of the analysis component is the ability to break down customer communications into health scores. This is often the missing part of the puzzle. To know customers true health, CS teams now need to understand customer sentiment and engagement to create a foolproof game plan. This ability is now available thanks to Artificial Intelligence (AI) helping companies understand customer behavior fluctuations and scoring across various channels.

- **Business Intelligence (BI)**

The abundance of product and customer data can get overwhelming if there is no "one source of truth" for KPIs tracking. This is where Business Intelligence solutions come into play. These tools gather all relevant information and condense it into a centralized dashboard for improved visibility across the organization. Connecting the dots is extremely important before getting started.



3. Analyze: The analytics tools map

Step #2

Act upon the customer data you have collected

Once you have taken care of the data harvesting, processing, and analysis, you can start taking some action. You will obviously need a Customer Relationship Management (CRM) platform to serve as the backbone of your operations. This will ideally be supplemented with customer feedback solutions, collaboration tools, and end-to-end support platforms like Zendesk.

Another key part of this component is your Customer Success (CS) platform, an option that many companies are opting not to indulge in. But these solutions can definitely help when customer management becomes complicated and task management tools stop being useful. But the true game changer for 2023 of this section is **Generative AI.** What it means for CS professionals is that they don't only get an alert to connect a customer, but also an automatically AI-generated message according to that alert.

- ### Customer Relationship Management (CRM)

  CRM and workflow management is the first thing you need to get started with executing your playbook. These end-to-end platforms help manage all leads, Freemium users, paid customers, and business pipelines. Task management, reminders, and event summaries are also covered by these automated platforms

- ## Customer Success (CS) Platforms

CS platforms take center stage when it comes to post-sales operations. CRM platforms are a great foundation, but CS teams need to monitor customer life cycles, detect adoption trends, and identify new growth (upselling, cross-selling) opportunities. CS platforms help enforce playbooks and track metrics, all with customizable triggers and alerts. New age CS platforms integrate AI to move from react to proactive.

- ## Customer Feedback Solutions

Customers want to be heard, but they don't want to get dragged into lengthy email conversations. The good news is that modern customer feedback solutions help fire in-app or email questionnaires just with a few clicks to gauge customer sentiment and collect direct feedback. The surveys are fully customizable and schedulable.

- ## Collaboration Tools

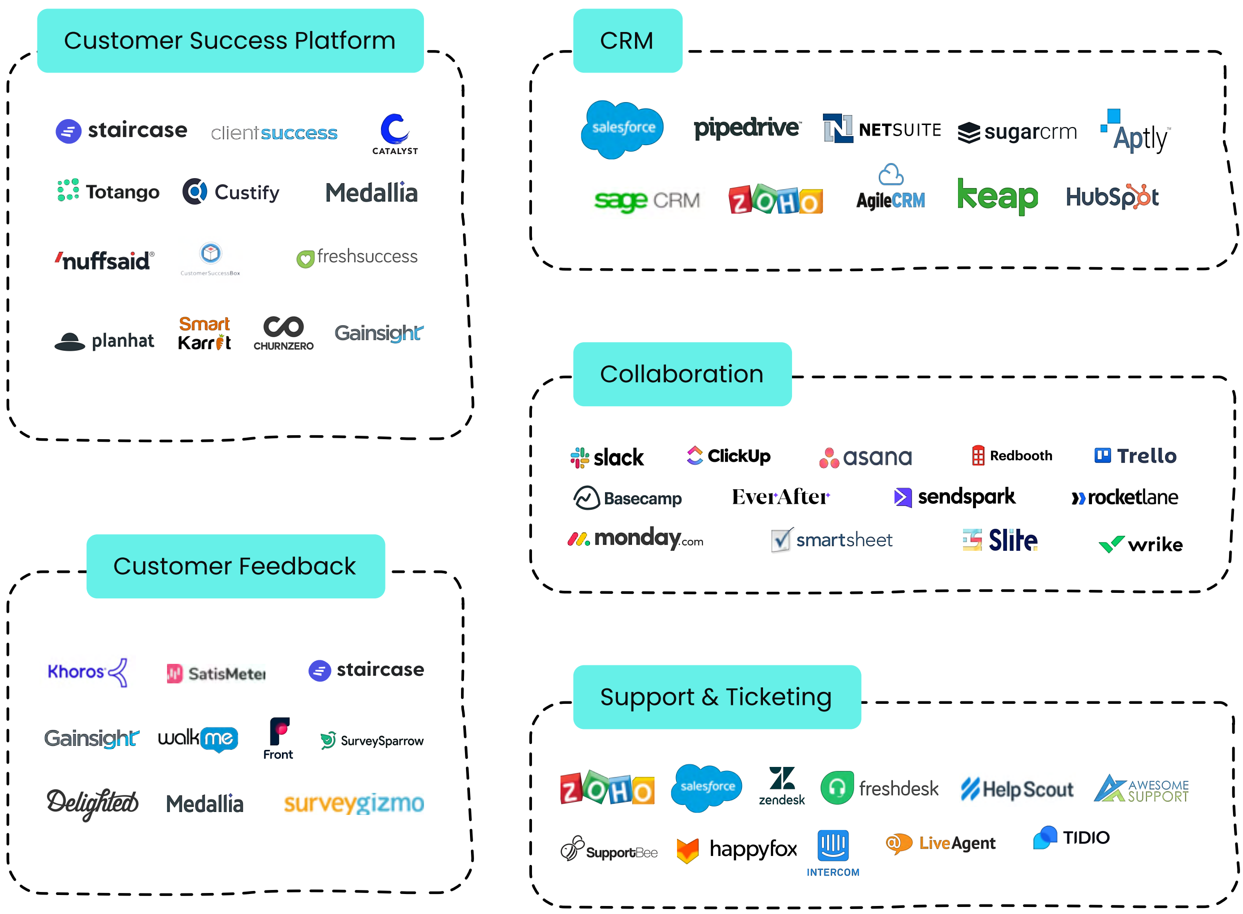
Many brands are now being judged by the level of ongoing professional information and customer support they are providing. Collaboration tools help bypass the bureaucracy and contact the right personas that are seeking help. These sentiment-boosting tools promote collaboration via direct chats, video calls, or push notifications.

- ## Customer Journey Solutions

When it comes to customer success in post-sales scenarios, fast response times are of the essence. CSMs need to tackle sentiment drops or changes within big accounts with quick onboarding analysis and engagement tracking. Customer journey solutions allow smooth orchestration of these activities, all in an automated manner to save time.

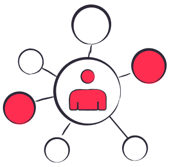
- ## Support and Ticketing

Customer success and support teams need to be extremely efficient in handling open tickets and support requests today. With businesses scaling up fast and users expecting to reach “aha moments” fast, only comprehensive chatbot, live chat, email, and social media integration can help collect more information about customer needs and expectations.



4. Act: The Operational tools map

Step #3



Engage with the customer with actionable insights

Traditional post-sales were mainly about answering questions and enforcing damage control protocols - both reactive activities. The modern approach is all about creating communities to improve brand awareness, elevate customer sentiment, and allow them to help each other. This helps create separation from the competition, while promoting account stickiness and improving brand engagement.

Strong relationships and increased loyalty means that there are more brand advocacy opportunities to tap into. The voice of the customer can be channeled into all sales, marketing, and support pipelines for sustainable business growth.

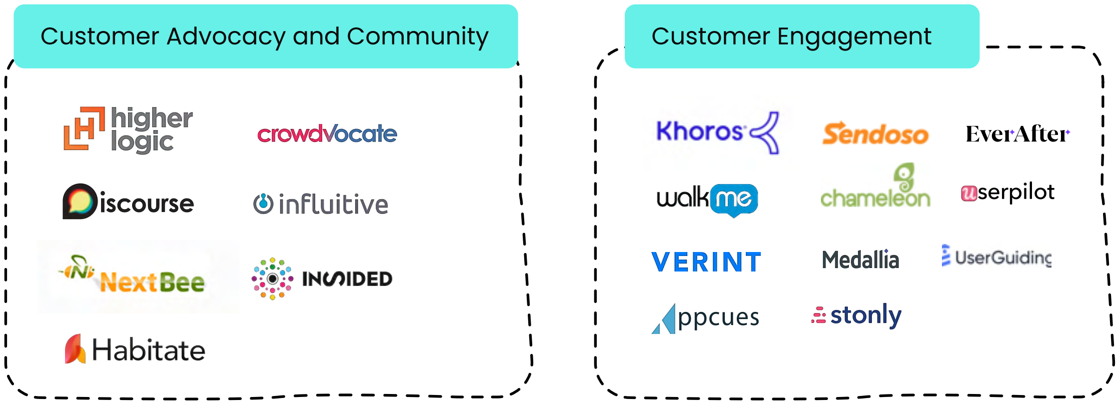
What tools do you need to cover these crucial bases? You can use customer advocacy and community tools. These will help you create (and grow) communities, where customers can connect with your brand and exchange experiences with others. But you can opt just for the vital engagement solutions, which help reduce friction, highlight key features, and turn users into brand advocates.

- **Customer Advocacy and Community Tools**

It’s now common knowledge that creating new communities and constantly engaging with customers empowers them. They feel more free to share their real thoughts and exchange experiences with others. Besides turning contributors into advocates, even identifying champions within big and complex accounts becomes easier.

- **Customer Engagement**

Improving customer engagement requires a proactive approach. Customer success teams need to understand what features the customers are using more and where the friction points are. This information can then be used to create in-app guides and optimize the user journey, while also emphasizing the value of less used features or services.



5. Engage: The Community, Advocacy and Engagement tools map

Step #4

Educate your customers and guide them to "Aha!"

The last pillar is all about elevating customer stickiness. But it's getting harder than ever to provide customers with the right content at the right time, especially at scale. Due to the massive competition for your customers' attention, documentation, guides, videos and product tours are playing a huge part in elevating customer satisfaction.

Users today are simply not interested in sending long emails to support reps, being on long Zoom calls, reading long feature emails that do not impact them. You'll need to educate customers more proactively. This is the time to use the insights you learned about your customers in Step #1 and enable your customers through short videos and guides.

- **Customer Enablement**

Customer enablement is all about knowledge democratization. Customer enablement solutions eliminate information hierarchies and make it accessible to all customers – free trial users, Freemium customers, and of course the paid ones. The result – making your product knowledge searchable and accessible, and less time users waste on requesting training, searching through countless emails, or opening support tickets.

- **Learning Management System (LMS)**

Customer stickiness is all about engagement. These goals can be achieved by improving information sharing and better echoing product updates. LMSs help upload videos, written content, and infographics, making it more accessible to users. Furthermore, customer engagement with this media and content can be tracked to create more of what's working better.

6. Educate: The Knowledge tools map

Use cases to consider: Different companies need different stacks

Every business is different and unique. Some are SaaS-centric, while others sell services, not to mention companies maturity can vary. Customers, even within the same account, have varying tendencies and preferences across personas and industries. For example, one may like to be contacted daily, while others will prefer to be left alone with short interactions. You need to take all of this into consideration before creating your CS tech stack.

The CS Tech Stack for SaaS Companies

SaaS product businesses engage customers via the cloud. That's why they need a sophisticated data-driven approach to track customer activity and sentiment at all times.

Taking this into consideration, CS leaders here will have to invest heavily in analytics tools (Product, BI, customer intelligence). Having a support and ticketing system is also mandatory, as are community and knowledge tools.

Your SaaS CS stack checklist:

- CRM
- Product Analytics
- Customer Analytics
- Business Intelligence
- Support

The CS Tech Stack for Service Companies

Service-based businesses usually provide services that are either created by a professional or by non-customer-facing tools (e.g. a design agency).

Such companies do not need BI or product analytics, but they must have a customer analytics tool due to the high volume of communications.

They also need a CS platform or a proper collaboration tool to make sure their projects are transparent and the communication is smooth. CRM systems are also mandatory.

Your Service CS stack checklist:

- Customer Analytics
- CRM
- CS platform or Collaboration tool
- Customer Community

The CS Tech Stack for Low-Touch Companies

Low touch business models usually involve simple products. Communication with customers has to be quick, intuitive, and easy, without too many processes or roadblocks.

Such businesses don't need to touch base with customers frequently, but make contact on a value-based basis. Product Analytics and business intelligence on such a use case are crucial. Engagement, community, and advocacy tools are also important here, since most of these companies need to scale up fast.

Your Low-Touch CS stack checklist:

- CRM
- Product Analytics
- BI Analytics
- Customer Community
- Customer Engagement
- Education and LMS

The CS Tech Stack for Low-Touch Companies

High touch business models usually come with more product or service complexity. They need to connect with customers as much as possible, learning their every move, and engaging at every opportunity. Customer satisfaction is always the priority as they're using the product intensively. There's a need to expand the usage across the company for stickiness. The stakes are relatively high, so it's worth it too.

These companies don't necessarily need community tools, but must put a strong emphasis on analysis. Such a company would need a strong support system, since products are complex and expected to have issues. High quality support is crucial, as are knowledgebases.

The High-Touch CS stack checklist:

- Product Analytics (if SaaS)
- BI Analytics (if Saas)
- Customer Analytics
- CRM
- Support & Ticketing
- CS Platform or Collaboration tool
- Customer Engagement
- Education & LMS (if SaaS)

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Letting Go of the One-Stop-Shop Dream

Summing things up, there’s no such thing as a “one stop shop” for managing accounts. Many leaders are looking for this silver bullet, but there’s no such thing in today's market. This is not to be confused with “One source of truth”, which is something you must strive to establish before getting started. The bottom line is that the “analyze” pillar is not fortified enough by many businesses.

The 4-pillar approach demonstrated in this guide differentiates between the different values each tool can provide your CS team. As mentioned earlier, the “Analyze” pillar is often the missing link, since customer insights are so hard to generate. Unfortunately, research shows that most companies still struggle to make sense out of it. The best part? All the data is there!

This is why managing your tech stack right is crucial. Identify your needs, plan your tech stack strategy and goals, and don’t forget to analyze your customers behavior.

Step #1 Analyze	Step #2 Act	Step #3 Engage	Step #4 Educate
Product Analytics	CRM	Customer Advocacy and Community	Education & LMS
Customer Analytics / Relationship Intelligence	Customer Success Platform	Customer Engagement	
Business Intelligence (BI)	Customer Feedback		
	Support & Ticketing		
	Collaboration		

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