

## Boutique Consulting Firm Specializing in Implementing Programs, Certifications, Technologies and Methodologies for Customer Success



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**CEOCFO:** *Ms. Eizips, what is the concept behind CSM Practice?*

**Ms. Eizips:** We are a boutique consulting firm. We specialize in customer success methodologies and we help companies fight churn and increase revenues through the development of customer success programs and the implementation of customer success platforms.

**CEOCFO:** *Are many businesses really interested in better customer service? What is the general feeling today about the need for quality customer service?*

**Ms. Eizips:** In today’s world, many companies generate revenues using a subscription based model. Most of these companies sell software-as-a-service or ongoing maintenance contracts, which are renewed periodically. Without providing value and proactively demonstrating value achieved, many companies run into churn or attrition issues. Today’s customers expect their vendor not only to teach them how to use their solution, but become their partner, teach them best practices, understand their business needs and help them maximize their investment in the solution. Companies that invest in fulfilling this need, increase the potential of fully maximizing on the lifetime revenues from their customers. They find more up-sell opportunities. They expand the usage of their solution beyond the existing user group to other departments within organization. When clients experience that kind of quality service, they are more likely to proactively refer outside their organization and take the time to advocate online. Ultimately, providing a higher level of service creates more opportunities for new business sale.

**CEOCFO:** *Are there particular points in time when a company might turn to you for help?*

**Ms. Eizips:** Most companies turn to us for help when they are experiencing a high level of churn or when they need to scale due to rapid growth. If the latter, the customer might have been doing well with a smaller customer success team, but as their business grows, they solicit our help to put a customer success system and a playbook framework in place. These ensure consistency in providing a higher level of service, promote transparency and help the customer success team members quickly see what is really happening with their accounts. We typically help our customers define their customer success playbooks and implement a customer success technology to promote efficiency, proactiveness and consistency.

**CEOCFO:** *What do you look at when you are called in by a company to understand what they are doing and to figure out a strategy for their needs?*

**Ms. Eizips:** The first thing we look at is their current situation. We ask specific questions about their industry and their business model. What we find is that some clients will have a small number of customers with a relatively high annual

recurring revenue per client, and some clients will have thousands of clients with a much lower annual recurring revenue per client. That typically determines the strategy that needs to be applied, what their customer success priorities and methodologies should be, and what technologies they should consider to help them scale.

**CEOCFO: *Where do the customer success managers come in? If you can put in a quality system in place, can almost anybody do a fairly good job or are there some industries where the personality or the capability of the customer success manager plays a bigger part? How do you distinguish?***

**Ms. Eizips:** First of all, it's important to distinguish customer success from customer service or account management. Customer success is not necessarily about onboarding the client or about providing professional services, support, or education. It is a team that is designated to be highly proactive with the customers. The team's main charge is to understand the business issues and challenges that each strategic client has and work with the client by developing a long term plan that would allow the client to fully leverage the solution and see the value that the solution can bring. A customer success manager should demonstrate not only what the value could be, but what are some of the wins that we have already had and what is the business value that we have already achieved. In other words, the customer success manager's role is to manage by measurable customer outcomes. We often see customer success managers, come in from a more traditional account management role, a sales role, or services and consulting role. The personality, experience, domain expertise and capabilities of the customer success manager play a big part in their ability to be successful at their job. A quality system helps scale, create efficiencies and promote transparency. However, simply having a system in place won't be enough to ensure that they will do a good job.

**CEOCFO: *Would you tell us about the different ways you are interacting with your clients?***

**Ms. Eizips:** We offer three types of services to our clients. To be successful at implementing a customer success methodology or launching a new program, you need to have three 'must have' ingredients: a well-defined customer success program, technology, and training. We help our clients in implementing the right customer success platform. Our technology consultants all have very strong salesforce and business intelligence experience and are all certified in customer success management. Our team helps clients get better and more immediate insights about their existing client base. They also help them become more proactive and prescriptive in reaching out to clients.

We also offer a training program to certify customer-facing teams in customer success management. While we do not certify the company, we do help certify the employees themselves to ensure they equipped with the right skills and knowledge to be successful. Finally, we partner with our customers by offering management consulting services to define or improve their customer success strategy. We typically begin by uncovering churn and success reasons. We do so by interviewing their existing customer, perform in-depth data analysis and conduct discussions with the internal teams. We then define and implement a customer success program based on the business model and what we learned.

**CEOCFO: *What are some of the more common barriers to customer success and what might be something unusual that you were able to find by your investigations?***

**Ms. Eizips:** I find that typical barriers to customer success largely depend on the client's business model. When the engagement model is highly strategic (aka "High Touch"), we are seeing that customer success is typically not achieved because our client doesn't have the full framework in place. We typically find that some of the playbooks that we know work very effectively for other clients, are just plainly missing from the program. More often the client's customer success program is not as prescriptive as it needs to be. When this happens, the organization depends largely on the customer success managers' individual ability to develop a trusted advisor relationship with their clients. As such, this becomes a barrier to ensuring a high quality of service in a consistence manner. In these situations, we often find that there's no system or processes in place to encourage and facilitate knowledge sharing between team members. When we come in, we create the missing templates and processes for them, we facilitate discussions that promote knowledge sharing, and we help scale the team through the use of technology to facilitate guidelines and consistency.

On the other hand, we see a different range of barriers to customer success when the company has an average monthly or annual recurring revenue too low to justify a dedicated customer success manager. In these situations, companies would apply a 'low touch' engagement model. We see a lack of having scalable processes and systems in place as their main barrier for success. Other common barriers include a lack of cross-functional processes which introduces the risk of slow adoption and higher churn. In terms of scalable strategies and systems, we note that success comes through providing clients with a range of live and self-paced training programs that promotes value. Scalable systems could also include customer email campaigns, which promote webinars and online workshops geared to increase adoption and value. Finally, an important component to the success of a low touch engagement model is the implementation of a 'voice of the customer' program.

The most unusual barrier to customer success that I came across while analyzing a client's data was related to the lack of a consistent customer experience throughout the customer journey. In this case, our data analysis showed that the trial

conversions were low because of two reasons. One, the user software interface needed improvement to allow for a better customer onboarding experience. Two, the marketing, sales, product and customer success teams were working in silo. As a result, users received completely different value messages across the customer journey. The difference was so great that most of the users quit their trial within the first few clicks.

**CEO CFO: How do potential clients find CSM Practice? How do you reach out? And are there many companies specializing in what you do?**

**Ms. Eizips:** We are the only consulting firm that offers technology, certification, and strategy services under one roof. We know the ins and outs of implementing customer success strategies, and we use these expertise to help our clients scale their customer success operations by implementing best of breed technologies. The ability to work with one firm on an end to end customer success solution sets us apart and is a huge benefit to our clients. That being said, you may find consultancy firms that specialize in high level strategy work; they will come in conduct a high level assessment, and perhaps even define the customer journey and related playbooks at a high level. However, most of them will not implement processes and systems nor will they create the templates necessary to execute those playbooks. At CSM Practice we do everything, from A to Z.

Customers reach out to us because they recognize our brand and thought-leadership in this space. We are highly involved with the customer success community. For example, I volunteer as the President for PulseLocal Silicon Valley chapter. PulseLocal is predominant organization for customer success professionals who wish to educate themselves on recent customer success trends and network with other customer success professionals. Our contribution helps us foster a strong and honest relationship with the local community. In addition to volunteering, I speak at customer success related conferences and local events. I see this as an opportunity for me to take an active part in the movement of customer success. Even though the movement started a few years ago, there are still many questions and a lot of confusion around what is customer success or how to implement it. By volunteering to speak at larger events and webinars, I get the opportunity to share the latest trends and best practices with a larger audience.

Overall, as a firm, we place a great emphasis on customer success education. We accomplish that through blog posts, our newsletter, and tweeter posts about interesting articles. Bottom line, we try to give back to the community by educating it about customer success. I believe these efforts help differentiates us by driving the point that we are in the business of customer success because we're passionate about it and because we are proud taking an active part in supporting the movement of customer success.

