

The Predictable Revenue Guide To **TRIPLING YOUR SALES**



*\$1 Billion+ In Proven Simple Sales Truths That Will Help
You Crush Your Growth Goals Year After Year.*

By Aaron Ross & Jason Lemkin

You Can Crush Your Growth Goals

The world's filled with sales advice. Some great, some harmful, mostly outdated or 'nice'.

'Nice' is helpful if you want a 30% bump. But what if you want a 300% increase? It happens more often and more systematically than you may realize...

If you care about sales for your team or company, here are a few *PRACTICAL, REPEATABLE* ideas that have been proven to make a HUGE difference in sales.

As in a \$100+ million difference.

Or going public & selling for \$1+ billion.

Or "only" doubling or tripling sales.

At a minimum, this ebook can help give you more peace of mind, predictability and clarity in how to make next year the best yet.

These Ideas Helped...

Salesforce.com almost double enterprise revenue and add \$1 billion to its topline revenues.

EchoSign and the Adobe Document Services grow from \$0 in revenue in 2006 to \$144 million in ARR in 2013.

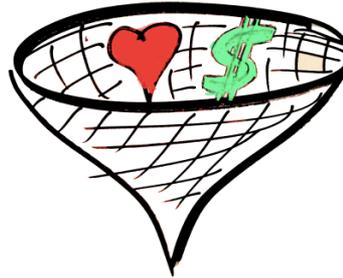
Responsys transform from a slow-growth \$20 million business to rocketing 10x to \$200 million in revenue in 5 years, and being sold to Oracle for \$1.5 billion.

Acquia (a \$45 million company) to add an **extra** \$12-\$15 million this year AND make sure it is "when, not if" it will break \$100 million in revenue.

5 Ideas That Drive Big Growth



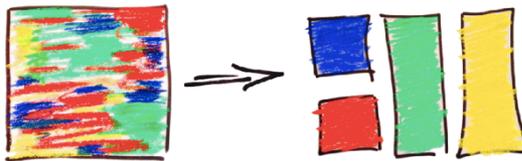
LeadGen 1: Seeds
Customer Success



LeadGen 2: Nets
Inbound Marketing
Growth Hacking



LeadGen 3: Spears
Outbound Prospecting



Specialize Your Sales Team
How to do it, big or small



Drop Sales Team Churn To <10%
Make your sales team scalable

About The Authors



ROSS

Aaron Ross is the #1 best-selling author of [*Predictable Revenue: Turn Your Business Into A Sales Machine With The \\$100 Million Best Practices Of Salesforce.com*](#) (called by Inc.com the “Sales Bible of Silicon Valley”).

He built the outbound prospecting sales team at Salesforce.com, which has helped add an extra \$1 billion.

Aaron’s married with five children (growing to eight soon through adoption), lives in westside Los Angeles, loves motorcycles, and keeps his work to 25-35 hours a week.



LEMKIN

Jason is a Managing Director of Storm Ventures and writes the #1 Saas blog: www.Saastr.com.

Jason founded & was CEO of EchoSign, the web’s most popular electronic signature service. Jason led it from \$0 to

\$100 million+ in revenues and through a successful acquisition by Adobe, where he then served as VP Web Services.

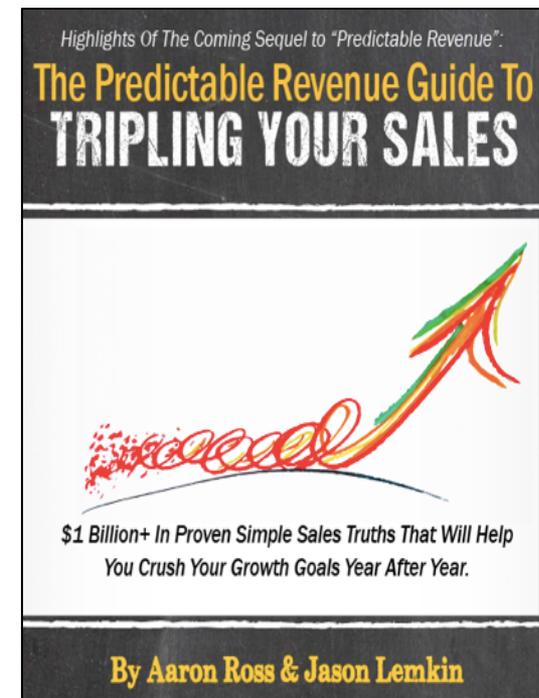
Jason’s married with two kids, lives in Palo Alto, and loves running every day without fail, and anything having to do with Hawaii.

Bigger, Better

This ebook highlights powerful nuggets from the forthcoming sequel to the #1 best-seller *Predictable Revenue*.

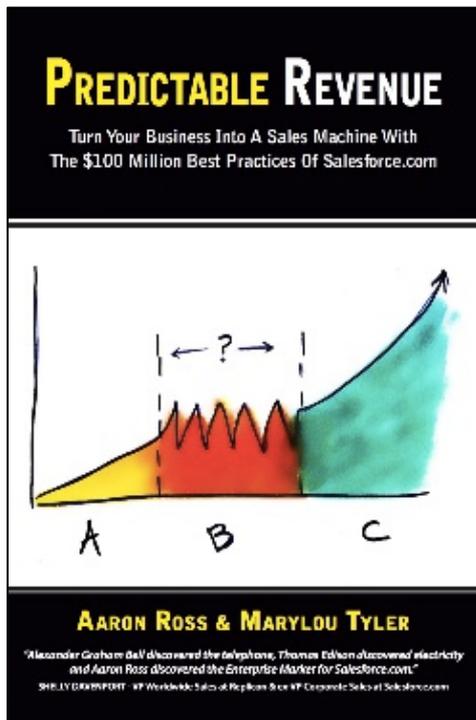
This ebook you hold contains highlights from the forthcoming full book, *The Predictable Revenue Guide To Tripling Your Sales*, a sequel to *Predictable Revenue*.

The “Triple” book builds on the original with more case studies, more details, more apps, and more ideas...as you’ll be able to see here.



Select Ideas From *Predictable Revenue* (1/3)

Lead generation drives fast growth, not the size of your sales team.



If you haven't read *Predictable Revenue* or it's been awhile, here's a short summary of select key ideas.

What Drives Rapid Growth?

Thinking that adding salespeople and working them harder is what drives sales growth remains a common fatal mistake with executives & investors.

Lead generation drives growth; salespeople fulfill it.

If you have predictable, scalable lead generation, you can create predictable, scalable revenue.

Salesforce.com added an extra \$100 million in revenue in its early years (and by now \$1+ billion), almost doubling growth, by creating a *dedicated* prospecting team following a "Cold Calling 2.0" process.

Why Salespeople Shouldn't Prospect

1. Experienced salespeople hate to prospect.
2. Experienced salespeople aren't any good at prospecting.
3. Even if a rare salesperson prospects successfully, they become busy closing, and stop prospecting consistently. It's not sustainable.

Select Ideas From *Predictable Revenue* (2/3)

80% of the time, better & more predictable lead generation is the key to unlocking faster, predictable growth.

Specialization Is Your Multiplier

Prospectors should prospect, closers should close.

Specializing your sales roles is the single most important thing you can do to improve everything.

The Four Core Sales Roles:

1. Inbound Lead Qualifiers
2. Outbound Prospectors
3. Salespeople/Account Executives
4. Account Managers & Customer Success Managers

This ebook will have more details on specialization in the section, "Your #1 Sales Multiplier: Specialization."

On Scalable Growth

"Work harder" and "make more calls" doesn't scale. Don't blindly do more of what's not working – fix the systems first, then put more energy into them after they're working correctly.

Great lead generation fixes **a lot** of sales problems.

Of course you only want to hire only great people, but the better your lead generation is, the less dependent you are on the quality of your salespeople and sales process.

You can have the most perfect sales process in the world, but if your lead generation lags, you will struggle.

Conversely, you can have a terrible sales process, but still do very well if you have great lead generation.

Select Ideas From *Predictable Revenue* (3/3)

Want new salespeople to ramp FAST? Create pipeline/leads for them to walk into. And promote from within as much as possible.

By promoting from within using a farm team system to develop talent, you reduce your "hiring risk" of new people because your talent already knows your products and customers, your culture, your systems and they've already proven themselves - or at least you already know the truth about their strengths and weaknesses.

On Outbound Prospecting / Cold Calling 2.0

The outbound prospecting role is often treated within a sales organization as a low-level, cheap job. If you treat it that way, you'll get low-level, cheap results.

A dedicated prospecting team with a successful process (which isn't "make 100 dials a day") is a very predictable way to create leads.

And if you can create predictable leads, you can create predictable revenue.

Traditional cold calls were ineffective at Salesforce. But an email-based approach, using simple text-based emails asking for referrals, generated 7-10% initial response rates & was wildly successful.

Hire hungry, coachable people (not too much sales experience), train them on your products and customers, and give them a *systematized process* and they can often generate all the appointments you need.

Sales Management

A sales team can only grow to the extent that top leaders (CEO, VP Sales) aren't needed to bring in or close deals.

Give your sales team the option to help create team goals & systems – even helping design their own comp plans – and you can get better results & more buy-in.

Which Apps Matter?

The original *Predictable Revenue* barely touched on useful sales & marketing apps.

Since the book came out, the number of neat sales & marketing apps has grown by one or two bazillion.

It can be overwhelming. There are hundreds and thousands of useful or interesting apps. And many individual sales reps have some of them helpful.

But which ones can make a difference across your entire team in repeatable, scalable ways?

Well, there are a LOT of great apps that can work for you that way, but here are a few to start with...



Which Apps Matter?

Some apps mentioned in the coming case studies:

Cirrus Insight: If you use both Gmail & Salesforce.com, run - don't walk - to get this app that lets you update Salesforce from within Gmail.

Gainsight: A Customer Success Management application to help teams more easily track & increase revenue with higher retention and upselling.

Hoopla: The #1 sales motivation app making it easy to excite inside sales teams into scoring more wins.

InsightSquared: An easy-to-use Sales Analytics solution that offers actionable insights into your leadgen & sales metrics to improve decision-making on how to triple your sales.

NewVoiceMedia: Cloud contact center solution that a) accelerates lead follow-up for sales, and b) personalizes customer support & customer success in Salesforce.

LeadGenius: An innovative outsourced prospecting service that helps in a small number of focused ways (rather than trying to do too much).

SalesLoft: A fast-growing favorite app salespeople & prospectors use to build targeted, high-quality lists (with emails & phone #'s) from LinkedIn.

Showpad: A tablet / smartphone app for field salespeople, whether they're visiting enterprises, small businesses or manufacturing plants. Tablets change everything for the field!

Yesware: A sales acceleration tool that helps you understand what activities equal closed business by tracking and analyzing email communications across Gmail and Salesforce.com.

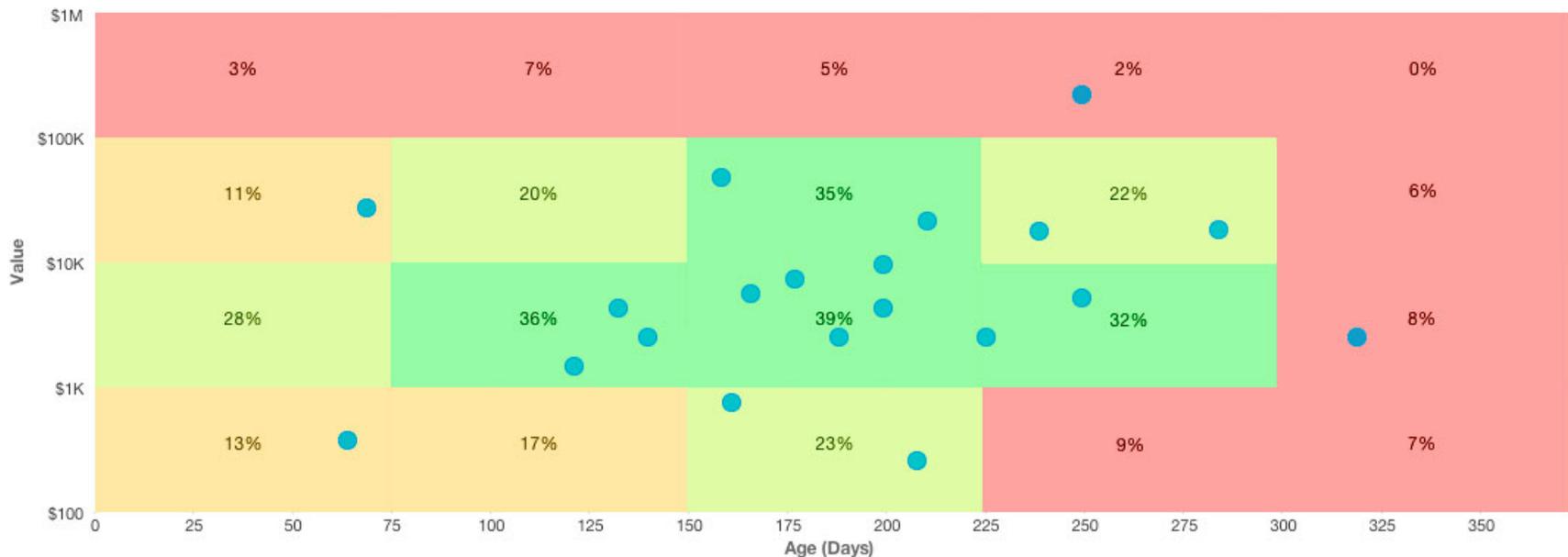
To Grow Faster, Hope Must Die

How many reps or managers count “maybes” or longshots to get them to quota every period? You know, the deals that always “could” happen? **Hope can make you blind** to seeing what is and isn't working or not; you need a reality check to make good decisions.

For example, the app InsightSquared helps teams reach ‘the truth’ more easily and sell smarter with live charts. This “Sales Strikezone” chart makes it easy for a rep or manager to zero in on just a few of their best opportunities to focus their precious time as the month or quarter gets closer to the end.

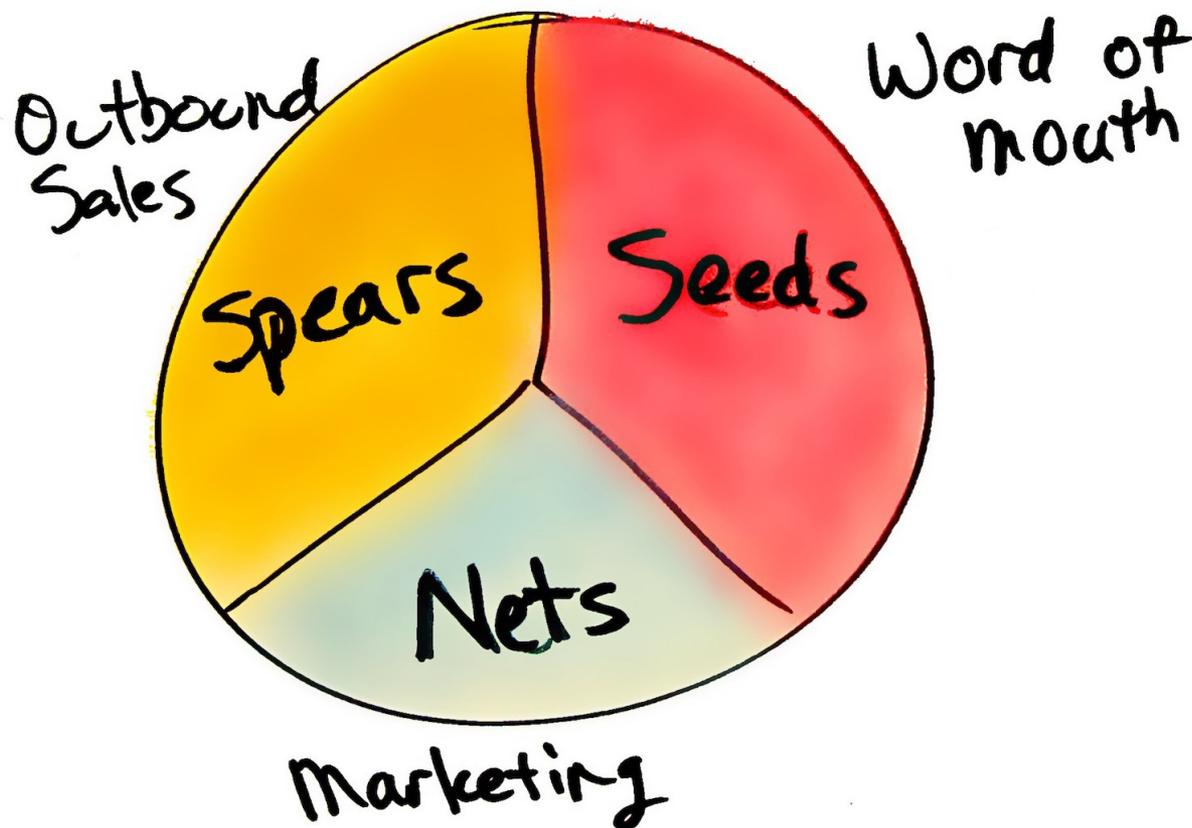
Which opportunities am I most likely to win?

20 opportunities above average win rate of 20% in the next 90 days



Introduction:

Lead Generation Is Your Gasoline For Growth:
"Seeds, Nets & Spears"



Lead Generation Absolves Many Sins

Have any of these problems?

- More than 20% of your salespeople missing quota
- Sales turnover > 10%
- Low close rates
- Slow sales cycles
- Demotivated salespeople
- Missed 2+ quotas in a row
- Bad breath (just checking to see if you're still reading...)

Rather than chasing piecemeal solutions like trying to improve your demo process, hiring approach and Salesforce.com setup (though all are important), more often than not, **there is “one thing to rule them all” – better lead generation can solve a lot – or most - of your sales problems.**

When you struggle generating enough decent leads for your salespeople, everything else needs to be perfect.

You need perfect salespeople.
You need a perfect sales process.
You need a perfect product.

Because *you have no buffer to get anything wrong.*

A bigger, better lead generation machine (whether from inbound, outbound, whatever) gives you a lot of slack to get a lot of things wrong – and yet still crush your goals.

You can have a perfect sales process, but without scalable lead generation systems, **you can't help but struggle.**



(It's not just the amount of leads – you need *quality* leads.)

With great lead generation, you can get pretty much everything else wrong, and still do really well.

There are the three basic types of leads that you need to understand.

Your Gasoline For Growth: “Seeds, Nets & Spears”

The best way to triple new sales isn't by tripling your salespeople (the traditional method) – but by tripling your qualified leads.

You can have a Ferrari car, but it doesn't move an inch without gas.

LEAD GENERATION IS YOUR
GASOLINE FOR GROWTH.

Yes - you do need a great product or service and some happy customers, but that's not enough, **and none of that matters if you can't *proactively* drive leads from both new prospects and current customers.**

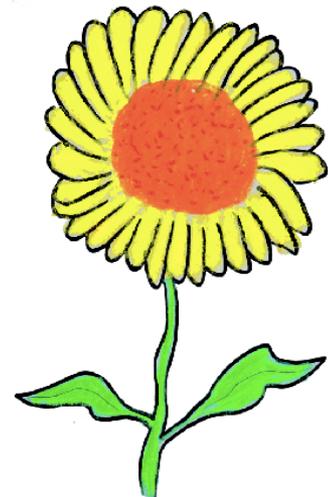
You can have the most amazing sales process in the world, but if you're not getting enough leads, you're going to struggle.

If you have a crummy sales process, but excellent lead generation, you're going to do well!

3 Types of Lead Generation: Seeds, Nets & Spears

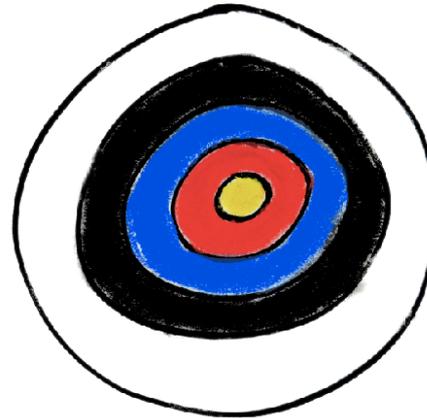
1) “Seeds” are many-to-many campaigns; they're based on word-of-mouth and relationships. For most companies, this mainly will be your happy customers who generate referrals, high renewal rates, and high upsell/cross-sell rates.

Salesforce.com pioneered the “Customer Success Management” services approach to systematize this. Happy customers beget more happy customers, and are your best source of long-term revenue growth and high profitability.



Your Gasoline For Growth: “Seeds, Nets & Spears”

2) **“Nets”** are one-to-many marketing campaigns, with approaches like ‘inbound marketing’ and ‘growth hacking.’ Hubspot and Marketo are two companies that have pioneered the whole inbound marketing industry.



3) **“Spears”** are targeted outbound prospecting or business development, ideally by a *dedicated* prospector(s). The “Cold Calling 2.0” outbound team and process at Salesforce.com has added more than \$1 billion in recurring revenue to companies, including Salesforce.com and Responsys.

One is not better than another

Too many companies obsess on a single form of lead generation and ignore the others.

To build a house you need multiple tools: a hammer, a saw and a screwdriver. Know why, how and when to use each tool.

Each type of lead can have *different* marketing funnels, conversion rates, sales cycles, average deal sizes, ideal target customers and methods of increasing them.

The important thing is knowing which type(s), and in what mix/balance, work best for your business.

Lead Generation Type #1: Seeds



What You'll Learn In This Section

Customer Success is NOT free help, glorified support or an afterthought!

- The pros & cons of “Seeds” (word of mouth) leads, and the best way to *systematize their growth*
- What it takes to make Customer Success a C-Level function (on par with sales & marketing)
- 6 keys to driving growth with Customer Success
- Why you're underestimating your Lifetime Customer Value by 50%
- How Gild dropped customer churn from 3-4% to <1% per month
- 5 Ways Topcon provides predictably excellent customer service



Lead Generation Type #1: “Seeds” = Customer Success

Customer Success is not about increasing customer satisfaction, but creating revenue growth.

All the great work you do to help others succeed & build relationships is “planting seeds” – whether they’re employees, partners, investors or customers.

It’s getting what you want by helping get what they want. So you can succeed and feel good at the same time.

“Seeds” is word-of-mouth lead generation. **Which is not scalable or repeatable**, *except when you have a methodical way of making customers successful & documenting it (“Customer Success”)*.

Pros & Cons of “Seeds”

Pros: Highly profitable, word of mouth leads are the fastest to close and have the highest win rates. There’s nothing better!

Cons: It’s almost impossible to proactively grow them.

How To Grow Seeds - Predictably

The best way to methodically grow your Seeds is with a dedication to *Customer Success*, which reduces customer churn, increases upsells, increases referrals & improves marketing content.

What “Customer Success” Isn’t

Customer Success is not free help. It isn’t glorified customer support. And like sales, it should be a revenue driver, not cost center.

Customer Success begins as a *mindset*, at the CEO level, on targeting, creating product for and servicing the kinds of customers that need your product.

The future standard for executive teams will include a head of Customer Success who’s on the same level as the heads of sales, marketing & demand generation.

Lead Generation Type #1: “Seeds” = Customer Success

Turn your funnel into an hourglass – how does Customer Success create revenue?



Executives need to understand that Customer Success is not about increasing customer satisfaction, but creating *revenue growth*.

With an executive focus on Customer Success, you will see:

Lower Churn: The easiest revenue comes from keeping the customers you have.

More Revenue (New Business & Upsells): More referrals to new customers; more willingness to try & buy your other offerings = \$\$\$.

Better Marketing: You can improve *everything* in lead generation & sales with detailed *case studies and testimonials*.

When Does 95% = Failure?

Your Goal: “Negative Revenue Churn”

Do you retain 95% of your customers month-to-month?

That'd be something to be proud of, until you do the math.

That's 5% churn per month, or 60% *per year*. In other words, you have to replace 60% of your revenue every year just to break even.

What if you have monthly 98% retention / 2% churn? That's still 25% a year, or a quarter of your revenue.

The best-run companies can see up to -2% *churn per month* (on a revenue basis). **Yes, that's NEGATIVE 2%** which means they make *more* money every month.

HOW?

Because the customers who stay with them buy & spend more over time than the company loses from other customers leaving.

Rules of Thumb In Saas:

“Customer Churn” (or “Logo Churn”) of 15% or less per year (just over 1% per month.) This is based on the *number* of customers who leave.

“Revenue Churn” of 0% or less per year. The customers who stay buy enough new licenses or product to cover revenue losses from the customers who left.

6 Keys To Driving Growth With Customer Success (1/3)

If you're a CEO, you need to take "Customer Success" as seriously as marketing, sales or product development.

1. Customer Success Is Your Core Growth Driver

All great companies' customers come from one main source – Word-of-Mouth...whether the lead comes via referral directly, or whether new customers are closed with case studies, references or testimonials.

This is much more measurable in recurring revenue models, where we can track renewal rates, upsell amounts & referrals.

2. Customer Success Is 5x More Important Than Sales

Yes – sales is *critical*. But sales is only there at the very start of the relationship. And to repeatedly close new customers, sales needs Customer Success resources – like references.

Generally, founders do a good job of doing whatever it takes to get a big deal closed – but often a poor job of everything after that, because they're off to help with the next fire, drama or Big Deal.

CEOs and founders – don't focus on getting new customers in so much that you ignore your current customers. *Get on planes to visit customers as well as prospects.*

3. Start Early, Hire Early

In SaaS companies, a rule of thumb is having one Customer Success Manager per \$2m in revenue – hired *in advance of that revenue*, not after you have it.

Silicon Valley companies with enough funding often now invest big at the beginning, with 2-4 people on the team right away.

Remember, a Customer Success person, like a salesperson or marketing budget, is an investment that should make you (a lot) of money, not just a cost to be put off as long as possible.

6 Keys To Driving Growth With Customer Success (2/3)



4. Visit Customers In Person

Unhappy customers don't (always) complain before they leave. In-person visits can make all the difference in surfacing problems and in changing their attitudes.

Jason's 5+2 rule on this:

- * Every cofounder, the CEO, plus every Customer Success Manager,
- * Must meet onsite with 5 customers a month (that's 60 per year), and
- * Get 2 customer badges every year as a bonus (that is – you visit so often to warrant a badge.)

A phone call is not a meeting. By visiting in person, regularly, your company will learn more about what's really working and not, earn more trust, and those customers will (almost) never churn. It's much harder to tell a friend you're leaving them than some faceless company.

What if I have nothing to say? Just show them your roadmap, and ask for feedback on it, and on issues they are having today. That alone will fill the meeting.

5. Customer Success Needs Financial Responsibility & Metrics

When your Customer Success function doesn't have financial goals, its value can get muddled.

One bad assumption is that “*a great product will automatically create happy customers,*” and you won't need to hire people to actively work with your customers.

However easy or incredible your product is, *you need humans talking to select categories of your customers.*

(Continued on the next page...)

6 Keys To Driving Growth With Customer Success (3/3)

5. Customer Success Needs Financial Responsibility & Metrics (...continued from previous page)

... The whole point of Customer Success is to increase “*Net Negative Churn*,” so you need tools & processes to measure and improve the function, including how the people on your team perform.

To justify investment (such as in headcount or tools) by a company, plus create the hunger a Customer Success leader and team need to deliver *measurable results*, Customer Success needs to own some financial results: **usually at least a) retention rates & perhaps even b) upsell revenue.**



For example, at Gild (a case study coming on Page 27) Customer Success owns:

1. “90 Day Adoption”
2. Feeding usage data & customer feedback into the product roadmap
3. Renewals
4. Upsells

And it makes it easy for the executive team and board to see exactly how the Customer Success function’s contributing to Gild.

6. Evolve Customer Success Goals & Metrics As You Grow (Source: Gainsight)

i. Traction (\$0-\$1m) – What do customers want, and what do they do with our product?

ii. Adoption (\$1m-\$5m) – Why and how should customers include our product in their daily business?

iii. Retention (\$5-\$20m) – Why do customers need to keep on using our product after the honeymoon?

iv. Expansion (\$20m-\$100m) – Why should customers expand to more seats, more features?

v. Optimization (\$100m+) – Automation & improvements driven by data.

Why You're Underinvesting In Customer Success (The Magic of Customer Success Revenue)

Everyone in SaaS talks about CLTV: Customer Lifetime Value; also known as LTV. (I try to avoid acronyms, but sometimes I just gotta use 'em).

You can see a detailed analysis of how to calculate Lifetime Value by David Skok at [Saas Metrics 2.0](#).

And then, everyone goes on to calculate some magic metric telling you how much to spend on Sales and Marketing, usually some fraction (1/3 or so) of your CLTV, or about the first year's worth of revenue from a customer. Sounds fine, so long as you have the money to fund it.

The problem is that this doesn't go far enough. Standard CLTV calculations don't account for virality and "second order" customers - the ones that come in later, from the first customer referring their friends.

In other words, your average CLTV should be higher because the first customer should get extra credit for helping bring in their friends to your company.

By underestimating the value of a customer, you may underinvest overall in acquiring them. Or - more commonly - you invest too much in Sales and Marketing and not enough in Customer Success.

Total Lifetime Revenue From A Single Average SaaS Customer:

Ok Sales closes its average Enterprise Customer A for \$10,000 a year. Nice.

Then, in Year 2, average Enterprise Customer A adds \$2,500 in additional licenses, for \$12,500 total in Year 2.

Then in Year 3, they add another 25%, or \$15,625 total.

So: direct revenue over the first three years = \$38,125 from that First Sale.

Now most customers last longer than 3 years, but let's stop there for now...

Why You're Underinvesting In Customer Success (The Magic of Customer Success Revenue)

Now: Second Order Effects

* At the end of Year 1, your champion quits Enterprise Customer A, but goes to Enterprise Customer B to do the Exact Same Job. And buys your product again. (This happens about 10% of the time.)

* So that first sale is actually worth \$42,000 (that first \$38k above x 110%). But then it happens again in Year 2. So it's really \$46,000.

* And at the end of Year 1, your champion tells three of her friends about your company. And one of them purchases. (About 30% of the time.)

So the first sale is actually worth \$60,000 with the second order revenue - *if you're making your customers super duper happy.*

So your "all-in" CLTV, including second-order revenues, could be **2x your current estimate.**

So sure, figure out the perfect ratio of Sales and Marketing costs to CLTV to share with your board.

Because the second order effects compound. This is where "Seeds" becomes a growth driver. They're *essential* to fast, profitable growth.

Revenue From Initial Sale + Upgrades + Customer Success Revenue



7 Common Customer Success Triggers To Watch

Examples of Customer Success triggers & alerts...

Use Data To Know Who To Reach Out To, When & Why

Most Customer Success efforts still use a lot of guesswork and manual reporting. But get your data act together, perhaps manually at first and later with a product like Gainsight, you can get a fuller look at each customer:

- *Contract data*: e.g., customers not expanding, stagnating, renewal or key dates coming up
- *Support interactions*: e.g., lots of low priority tickets or customers that have stopped calling

- *Billing / payment history*: e.g., delayed invoices due to frustration

- *Product and feature usage*: e.g., which features are sticky and who's using them

- *Marketing engagement*: unsubscribing to newsletters

- *Survey feedback*: e.g., bad input from key person

- *Sponsor changes*: e.g., exec contact leaves, new CMO

Now, data can't warn you of every problem. You will always need humans talking to humans to uncover & resolve issues.

But this data will help you:

1. Develop triggers for when to intervene proactively before bad stuff happens. Obviously it's easier to save a customer before they send you a canceling notice! First the team does this based upon intuition, and over time it can be based more and more on historical data and automatic triggers/alerts.

2. Standardize interventions so that each Customer Success Manager is using the same set of best interventions, and with this consistency you can better measure the effectiveness of each intervention or type of problem / solution.

How Gild Dropped Monthly Churn From 4% To <1% (1/3)

Gild is helping companies better recruit engineers, by using data available on the web (including developers' actual code) to help measure their abilities.

Brad Warga's the SVP Customer Success there. He joined when there were just 5 people: CEO, CTO, CSO, head of sales & head of marketing (now there's 50+).

Brad had been in HR/recruiting for 20 years, including recently being the VP of Corporate Recruiting at Salesforce, helping organize & execute *thousands* of hires.

The team wasn't exactly sure what Brad would do at first, but they felt he could bring a lot of credibility, and he did. First, he helped bring in new customers.

After The First Year Of Selling

During most of the first year of selling, Brad helped bring in new customers, until there were about 50. Churn was artificially low –as everyone was on annual contracts!

When the contracts began coming up for renewal, churn jumped to 3-4% a month, or 30%+ per year; 2-3x *their target*.

Churn Goals: “15% & 0%”

SaaS companies want:

- 1) 15% or less churn per year on their total number of customers, &
- 2) 0% or negative revenue churn (upsell revenue from ongoing customers should exceed revenue lost from leaving customers).



Gild starting measuring and analyzing churn, and realized many of their assumptions were wrong.

For example, it turned out that how often people logged in wasn't a great way to tell who would stay or go. Gild actually needed to look at which parts of the product were being used, and how. How savvy were the users? What were their recruiting needs and methods?

How Gild Dropped Monthly Churn From 4% To <1% (2/3)

What Gild assumed would help spot churn - such as how often users logged or didn't log in - was wrong.

By digging into these root causes of churn, Brad & Gild were able to systematize customer success and drop churn to <1% per month.

(And – it made Gild much smarter about targeting the right kinds of customers from the very beginning with lead generation.)

The Three Methods That Dropped Churn:

1. “90 Day Adoption”

The Customer Success team's relationship with a customer starts when the customer purchases the product and it's turned on.

The team trains the new users how to use the product, what the best recruiting practices are, and re-sells / re-evangelizes Gild to the users to get them excited.

Gild found out that if there's successful usage of the product in the first 90 days, *then usage will be 3x higher for the rest of the year* compared to a customer who didn't adopt fast.

2. Quarterly Business Reviews

These “reviews” are formal and help hold the customer accountable to what they signed up for. Ideally, they're onsite with the right customers.

3. Using Predictive Tools

Gild's main Customer Success application is Gainsight, along with Zendesk (captures trouble tickets and feature requests), Salesforce.com, and Olark (chat).

Brad: Don't Ignore Your Users
Now more than ever it's the users who decide whether to renew a product or not. As a renewal comes up, decision makers will ask the team “Do you use this product? Get value from it? Should we use it another year?”

How Gild Dropped Monthly Churn From 4% To <1% (3/3)

Four functions Customer Success owns at Gild: a) 90 Day Adoption, b) roadmap feedback, c) renewals, & d) upsells.

Team Composition

The Gild Customer Success (“CS”) team has about 10 people across three roles (out of 50 employees!):

- 1) *“Inside CS reps”* who train, monitor usage & run analytics. There’s one rep per 70 users.
- 2) *“Outside CS reps”* who handle & are measured on renewals. There is one rep per 30 users in their relevant customer segment.
- 3) *“Executive CS reps”* who are responsible for upselling, and who work mostly with the larger or fast-growing customer segment.

These teams’ main app is Gainsight, which also displays Salesforce.com & Zendesk data, so everything’s in one interface.

The Gainsight reports & dashboards make it easy to spot at-risk customers or customers who need more product, and gives reps a reason to call a customer to talk.

C-Level Customer Success

A lot of companies treat customer success as an afterthought, or glorified customer support. Companies need to treat it (at least) as important as sales or marketing.

At Gild, Customer Success owns:

1. 90 Day Adoption
2. Feeding usage data & customer feedback into the product roadmap
3. Renewals
4. Upsells

By owning these and being able to clearly articulate them, it’s easy for the board to recognize the value of Customer Success there.



Use Data To Know Who To Reach Out To, When & Why

Turn Customer Success metrics/alerts into Dashboards to cut guesswork

(Source: Gainsight)

Customer ▲	Renewal Date	Overall Health	Support	Customer Satisfaction	Adoption
<input type="text"/>	m d yyyy	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
Abacus Programming Corporation	11/14/2014	40 ↓	60 ↓	34 ↓	76
Abberley Kooiman	11/12/2014	61 ↓	36 ↓	79	34
Abbett	6/1/2014	40 ↓	78 ↑	20 ↓	61 ↑
Abbey Press Inc	5/18/2014	53 ↑	80	37	74
Acme	2/1/2014	61 ↓	10 ↓	76	68
Aero Precision	12/2/2013	77 ↑	87	74	76
American Eagle	2/6/2014	46 ↓	48	37 ↓	70
Arista	10/3/2014	87 ↓	81	80	78
Ask.com	1/21/2014	58 ↑	79	55	48
Asus	1/22/2012	71 ↑	53	74	79
Bachman Information System Inc.	11/14/2014	62 ↑	81	62	42

Five Ways Topcon Delivers Predictably Excellent Service (1/3)

Frustrated Customer Support agents Help create frustrated customers.

Customer Support (like sales or sales prospecting) doesn't have to be a burnout, boiler-room job.

Why are the two teams that interact with customers the most (sales, support), so commonly mistreated or unappreciated?

That needs to change, since frustrated agents (& salespeople) help create frustrated customers.

Topcon Positioning Systems (part of the \$1 billion / 4,000 employee global Topcon Corp.) is the world's largest developer & manufacturer of...yes, positioning systems.

Topcon's customers are in industries like civil engineering, surveying & agriculture – where mapping & positioning are vital.

Topcon has contact centers around the world. Angie Todd supervises the 18 USA agents in Columbus, Ohio and in Olathe, Kansas. Angie's spent four years as a support agent and four years as a supervisor.

The team handles handles 25,000 calls per year, which are all recorded and reported on.

Angie says their goal is to provide *predictably* excellent service.



Support's Two Main Applications

It wasn't that long ago that the support team at Topcon used binders and paper to track cases and manage the team.

Needing better documentation and accountability/metrics, Topcon implemented:

a) Salesforce for their Global Case Management system, and

b) NewVoiceMedia's *ContactWorld* product (the #1-rated call center app on Salesforce.com's AppExchange) for telephony: call routing, recording & reporting.

Five Ways Topcon Delivers Predictably Excellent Service (2/3)

Angie's Expert Advice – 5 Tips

1. Get Agents Away From The Phone

Spending 40 hours a week on the phone and interacting directly with frustrated customers can be a recipe for agent burnout.

Get agents away from their desks regularly for product cross-training and to visit customers at their locations.

This will keep agents interested, fresher, and engaged. It will help develop more experienced and confident agents with better attitudes and a skilled ability to help customers, increasing first-call resolution rates.

In the past few years, it's finally easy with internet-based call center/telephony applications (like NewVoiceMedia) to route calls to any agents phone (mobile phones, home phones, etc.). Now agents don't have to be chained to desks, making the job friendlier and more flexible for them.

2. Use Technology To Help Customers As Well As Yourself

Don't forget that technology is also about improving the experience for customers as well as reducing your costs.

The last time you called a bank – how many times did you have to enter your credit card or account number before you got to the right person?

When a customer calls Topcon, NewVoiceMedia compares the phone number against data in Salesforce and can automatically route that person to the right agent. The customer doesn't have to type anything.

For example, if they are marked in Salesforce as a "Gold" level client with the best Service Level Agreement, that caller can be automatically bumped to the front of the phone line – with no wait!

Five Ways Topcon Delivers Predictably Excellent Service (3/3)

Neat for customers: knowing whom to automatically route you based solely upon your phone number and some data in Salesforce.com.

3. Continuously Listen to Feedback

In most organizations, the Customer Support group interacts with the customer the most.

Unfortunately, some organizations overlook the support team and all that valuable knowledge. The support team is the voice of the customer.

4. Create A Career Path

Your best employees won't want to stay in the same job their whole lives, they'll want to grow.

At Topcon, agents know they will spend 2-4 years in support, learning everything about Topcon and its products, as a first step in their career path.

If you hire right, you can use support as a great training experience that develops experts to later transfer or promote throughout the rest of your company.

5. Specialize Agent Roles

Topcon has five "first level" agents with a basic understanding of all products; and 13 other agents that specialize in an application or industry.

With a variety of support specialists, customers can get better service and it creates different opportunities for reps to grow within support.



Use Your Damn Brain

80% of ideas throughout this ebook you should “just do.”
The other 20% you’ll need to mutate, customize or throw away.

So what if you’re not the CEO? **No matter what your title is, be an *entrepreneur*, not an *employee*.**

Don’t wait around for others to make something happen – take the initiative.

Test lots of different things; run experiments.

Have a plan, but hold it lightly.

Do more of what works. Stop doing or change what isn’t working. (It’s funny how often people don’t do this.)

Stop talking and thinking about it and just DO IT or at least do *something*.

Dig for the *truth* (not what you want to hear).

Just try it.

DON’T GIVE UP.

Stay Tuned For Part 2

Thanks for reading Part 1. Part 2 will be about “Nets” lead generation, including inbound marketing & growth hacking.

To automatically receive each free chapter as soon as we release them, and to get additional case studies and other private freebies (like a separate ebook just on the metrics of Seeds, Nets & Spears), make sure you're on our mailing list at www.PredictableRevenue.com/triple.

