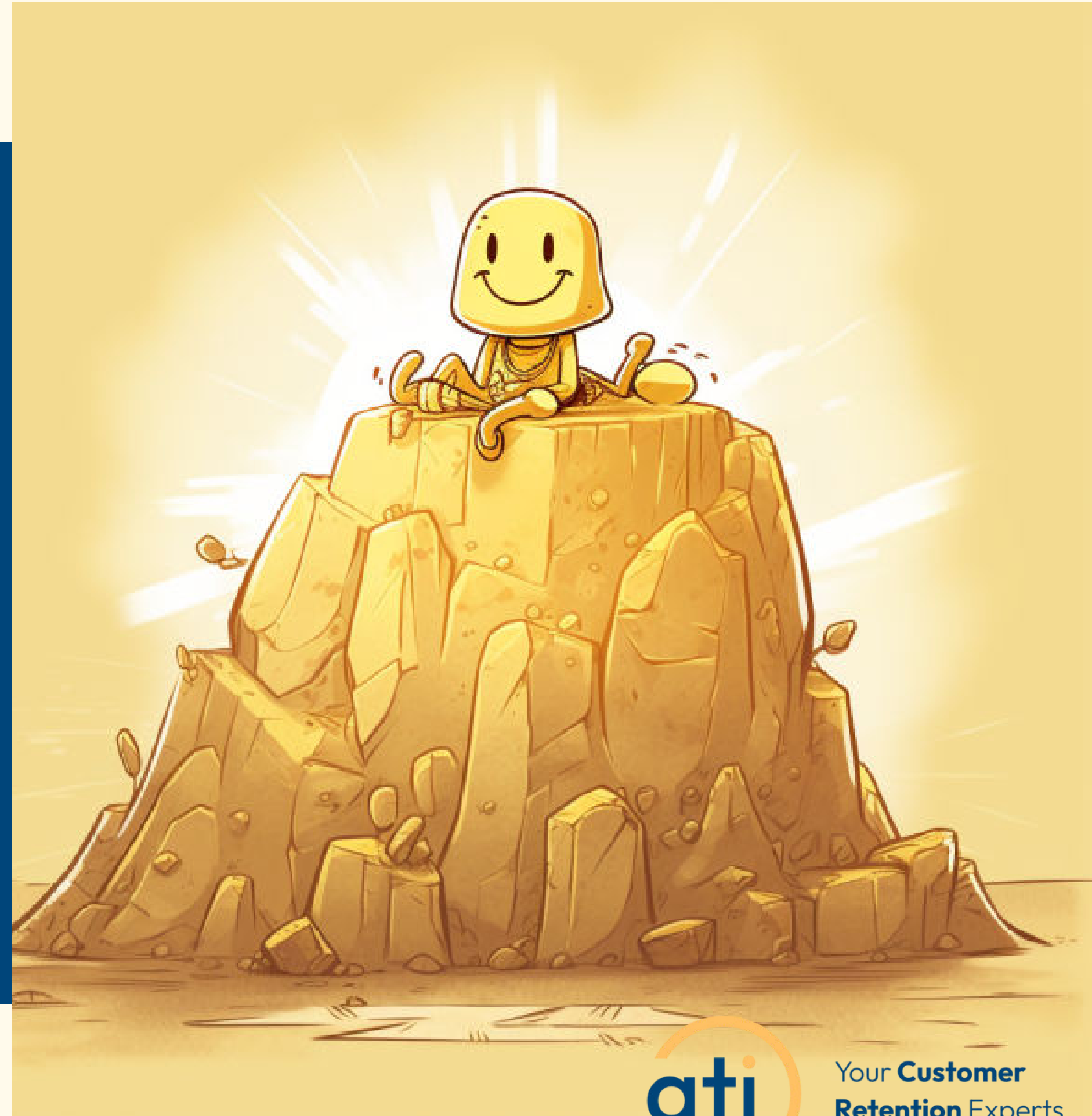




THE CUSTOMER SUCCESS GOLDMINE FRAMEWORK



Your **Customer**
Retention Experts

Customer Success is vulnerable.

We wrote this guide to show Customer Success Leaders like you how to start positioning Customer Success in your company from being vulnerable to valuable.

The **Customer Success Goldmine Framework** is what we use with our clients to transform the Customer Success team in their companies from a perceived operational necessity to an indispensable business function.

This guide shows you how to start making that transition happen.



THE CHALLENGE

Customer Success Leaders are now expected to

- know their data
- identify and diagnose retention issues
- prescribe and lead cross-department initiatives to resolve & mitigate retention issues

Unlike any other core business function,
Customer Success has an incredible data advantage.

You likely don't even know you have it . . .

Customer Success



PRODUCT



MARKETING

SALES

SHARING THESE INSIGHTS YOU WILL



- reduce churn
- lower customer acquisition costs
- lower costs to serve

- shorten sales cycles
- increase Customer Lifetime Value

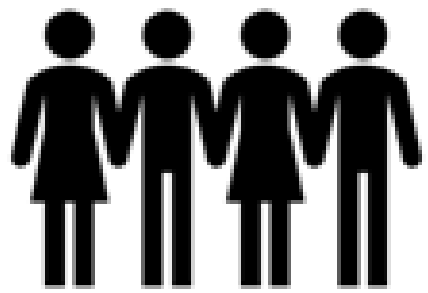


- increase positive brand impact
- generate more referrals
- create advocates

- contribute to a higher company valuation
- create happier customers

- reduce your CS team's vulnerability in an economic downturn

The CS Goldmine Framework



choose the
first team



research
what
matters to
them



run
customer
interviews



analyze the
data for key
points



share the
findings +
your ask

CHOOSE THE TEAM

The CS Goldmine Framework starts with choosing the first team you're going to create your collaborative tie with.

In our experience, *Marketing* is usually the easiest and most receptive team to receiving customer insights data.



STEP 1

CHOOSE



STEP 2 RESEARCH



Research the **insights** your Marketing Leader cares about the most.

You are going to dig into your Customer Insights Goldmine to find insights to help your Marketing Leader improve their metrics.

By helping to improve Marketing's metrics, you will start cementing CS's value not only to Marketing but to your exec team too.



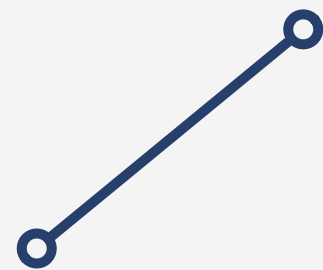
STEP 3

THE INTERVIEWS



Ask 5 customers

Pick 5 of your customers. Ask them for a 15 minute interview.



3-4 questions

Ask the same 3-4 questions to all 5 customers.**



Record the calls

Record the calls so you can transcribe them. This will help you in finding key insights.

** see the end of this guide for a list of questions.

ANALYZE THE DATA

STEP 4

Look over your 5 customer interview transcripts.

- Identify key phrases or words your customers use that are meaningful to your Marketing Leader.
- Couple your interview findings with your existing customer insights data. Be sure to include both qualitative and quantitative insights data.





STEP 5



SHARE & ASK

#1. SHARE

Share your customer interview insights & your other data with your Marketing Leader.

#2. ASK

Ask to create a shared Customer Insights database between CS & Marketing. This database holds current and accurate customer insights data.

SOME HELPFUL TIPS

Here are 3 things you can do to improve your chances of success:

1. **Keep it simple.** Use Google Sheets or Airtable at first. Keep the database out of your CRM or CS software.
2. **Repeat.** Once your Customer Insights database is showing positive results, repeat the process with Product and Sales. By this point, all executives should have access.
3. **Stay committed.** Continually update your Customer Insights database. You'll get better data to make better decisions which results in better customer outcomes.



CUSTOMER INTERVIEW QUESTIONS

PICK 3-4 QUESTIONS

What motivated you to seek out our product?

Can you describe the moment you realized our product was the right choice for you?

What made our product stand out against the competition?

What can we do to further differentiate our brand from competitors in the market?

Would you recommend our product to others?
If YES or NO, what would you say?

Have you ever advocated for our brand in your personal or professional network? In what way?

Are there other products in the market that you considered or have used? How do they compare to ours?

Can you walk us through your journey from first hearing about our product to becoming a customer?

Which interactions with our company stood out to you?

Want more details?

Check out the [companion article](#) to this guide.



Your **Customer**
Retention Experts