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**Customer success: Trusted ambassadors  
through uncertainty**

Respond, recover, and thrive





## Phase 1: Respond

During this first phase, deliberate, proactive, and authentic communication with customers is key. As the changing environment leads customers to consider sweeping changes to their businesses, customer success leaders should be honest and sensitive and emphasize that they are here to help. Customer success executives should work to create stronger human connections and strengthen customer relationships.

Moreover, it is critical for organizations to retain existing customers as customers reevaluate their product spend. Customer success leaders will likely be faced with the difficult task of not only reiterating the value of their products, but also helping customers optimize their usage to best respond to needs in this critical environment. Customers, at the same time, are likely to gravitate to products and services that are essential in nature, while also seeking lower costs. Customer success managers must work to dispel the notion of cost-driven product swaps and establish stability with their current base of customers.

We recommend considering the following actions to address these changing needs during the Respond phase:

- **Develop a frontline communication and training strategy:** Create a strategy for all frontline employees and CSMs to reach out to customers in a unified, empathetic tone. Focus on the customer's human needs and emotions and emphasize listening. Make sure customer success teams are empowered to focus on paying attention to their needs and engage with them as individuals.
- **Proactively engage with key customers:** Define "key" customer segments and engage in meaningful, continuous communications to support retention and business continuity. Key customer segments might include customers with high renewable probability within the next two quarters, highly profitable customers approaching renewal, high-value or strategically important customers, and customers with high risk of churn. Despite the strategic importance of these customers to you, it is critical to ensure that you meet your customers at their point of need. Whether customers want to accelerate work to address critical issues or slow down the pace to focus elsewhere, align your level of engagement and support with their specific needs. For customer segments that do want to slow down, consider demonstrating long-term customer commitment by downgrading customers to a lower-tier subscription, reducing subscription licenses to match declining user counts, or presenting alternate payment terms.
- **Establish new ways of working:** In addition to customers, the customer success team itself may also be experiencing a new world. Customer success teams will be working from home and may have new realities that come with this. Ensure there are new processes defined to make this as smooth as possible. Team leaders should consider defining new working hours to accommodate changes in childcare options, creating virtual team-building opportunities, and equipping team members with remote working tools and security solutions.
- **Set up a triage center:** Manage incoming requests in an orderly fashion. By creating a triage center, insights can be shared to better support your customers. Consider delivering insights to customers on changes in macroeconomic conditions (for example, industry outlook, business criticality, and personal impact to teams and individuals).





## Phase 2: Recover

In the second phase, customer success leaders should apply learnings from their customers and the market to emerge even stronger. After a communications plan is developed and key customers are supported, it is time to rethink key customer success motions to help ensure continued stability. In this phase, customers will be rethinking their orthodoxies and accelerating digital initiatives to succeed in a virtual world. Understanding how customer outcomes are changing and developing new tools and processes to support those changing outcomes is vital. Customer success should be the differentiator to demonstrate an authentic commitment to helping achieve those outcomes and building long-term trust and enduring relationships along the way.

Customer success leaders can help businesses recover through the following motions:

- **Reassess customer outcomes:** For many customers, the definition of success is changing rapidly. In this moment, it is essential to listen to your customers to understand how their business priorities are shifting, and thus how their definitions of success have shifted. Customer success professionals can use the existing rhythm of success planning to reach out and engage customers with authenticity and empathy to understand how their business priorities are evolving. From these discussions, teams can create success plans to document these new outcomes, define plans to help, and embark upon a regular cadence to collaborate to achieve those outcomes.
- **Relay real-time VOC signals:** In times of uncertainty and market volatility, companies must maintain a pulse on the market and shifting demand needs. Customer success has a unique vantage point to capture market signals from customer conversations and share those real-time insights across the organization. This positions customer success teams to expand their impact beyond the traditional role of understanding product usage to include customer, industry, and market insights at a time when they are most needed. Customer success teams should systematically document common themes and the customer perspectives they are hearing to enhance internal knowledge and enable leadership teams to make better-informed decisions and act with confidence.
- **Reimagine value delivered:** Adapting to a changing landscape requires creativity and innovation, presenting customer success teams with an opportunity to expand the lens for how they create and deliver value. While a traditional customer success mindset focuses on helping customers derive value from products, teams should think more broadly and contemplate how to help customers get the most out of the overall relationship with your organization. Beyond traditional product and solution offerings, consider what additional capabilities or expertise can help customers in new ways. In some cases, companies are extending their own capabilities, such as logistics or virtual workforce management, in creative ways that help their own customers. On a more targeted scale, consider hosting community engagement webinars or virtual chats that connect customers with peer groups to share stories and learn best practices. Additional activities to create value beyond transactional relationships might include partnering with customers around common values to help solve emerging industry issues or needs in the community.
- **Realign solutions:** As customer needs and use cases change through the Recover phase, customer success teams can leverage their market “listening” skills to identify new use cases and inform new solution development. By leveraging customer insights, examining market conditions, and analyzing product usage data, organizations should be proactively developing targeted offerings that address the changing landscape. In some cases, this could mean redeploying existing products or features to address new needs. Alternatively, introducing new training or service offerings or unlocking premium features can be essential tools to help customers manage through times of need.
- **Reevaluate customer health score:** Customer health scores will also need to be closely monitored, as they are an early indication of churn. However, just monitoring customer health metrics will not suffice, and the scores likely need to be recalibrated. Determine what additional factors—such as vulnerability to macroeconomic conditions and liquidity—to include in the score. Likewise, consider leveraging data and analytics capabilities to identify user behaviors and activities that may serve as new health indicators that can be included in the score.



### Phase 3: Thrive

In the third phase, customer success leaders should help their organizations discover new ways to succeed in this new normal. Customer success teams have a 360-degree view of the customer, have updated the customer's definition of success, and have defined new customer success motions. Now, it's important to document learnings, reimagine engagement models, and serve customers' emerging needs. If trust is built during the Respond phase and customer success was deployed effectively during the Recover phase, there is a greater likelihood that in the Thrive phase customers will increase their spend, become strong advocates, and commit to sustained and mutually beneficial relationships.

We recommend the following actions in the Thrive phase:

- **Reflect on lessons learned:** Share leading practices and create a crisis playbook. The unique and unprecedented challenges teams are facing today will not be the last challenging business environment. Ensure that lessons are captured—both good and bad—to empower new staff in the future to quickly choose the best path forward.
- **Accelerate digital transformation:** Identify new digital initiatives to accelerate revenue and decrease cost to serve. Consider using a customer success tool or other advanced technology in customer communications to reach all customers—large and small. Customer success tools provide a platform to manage customer success motions, identify at-risk customers, and coordinate cross-functionally across adoption, retention, and renewal phases of the customer life cycle.
- **Optimize customer engagement model:** Maintain practices that optimize cost with no impact to experience. Define and map the customer journey and touchpoints within the organization, rethink the moments that matter, and evaluate the type of engagement—high- or low-touch—and understand how this iteration ties ultimately to customer health scores and retention or churn. Moreover, when determining the customer engagement model, expand the lens of how value is defined and consider human ways of engaging your customers. Executing with humanity will continue to help build trust and demonstrate goodwill to foster stronger and more sustained customer relationships.

### Conclusion

According to our [2019 Enterprise and Customer Success Study and Outlook](#), only one-third of customers surveyed are satisfied with the current level of services delivered. Moreover, the same study noted that only one-fourth of customers surveyed said that they consider their service providers to be trusted advisers and would advocate for them without any caveats. Despite the changing times and new ways of working virtually, this may be the time to engage with customers on a truly human level, as well as take tactical actions to truly become trusted advisers. This is a unique opportunity for customer success leaders to help their business Respond, Recover, and Thrive in this new world.

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