



# Customers For Life: Managing the Customer Journey

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## Introduction

In a competitive world, attracting new customers is a major accomplishment but it is just the beginning of what will hopefully be a long-term relationship.

Once a SaaS company has a new customer in the fold, the next challenge is getting them to adopt and, even better, embrace the product. It is not enough to articulate a product's benefits and features. Instead, SaaS companies have to be proactive and disciplined about how they ensure that customers quickly see and experience the value being delivered. This drives usage, retention, loyalty and evangelism.

In this Whitepaper, we will explore three key parts of the customer adoption lifecycle:

- Identifying the customer journey, which helps SaaS companies understand what the customer is trying to achieve and their objectives.
- The account coverage model, which involves aligning your company's resources to achieve corporate AND customer objectives.
- Monitoring and measuring customer health to make sure the customer is on the right track.

By focusing on these three components, SaaS companies can drive customer adoption into long-term customer loyalty.



## The Customer Journey

In simple terms, the customer journey is the path to success for you and your customers. It defines the key steps a customer follows as they learn, implement and embrace your product. It plays an integral role in establishing an engaged relationship with your customers so they receive value from your product as quickly as possible....and continue to get value down the road.

The customer journey is a fundamental component of customer success because it provides a well-defined roadmap. The customer journey helps SaaS companies understand their customers so they can provide the right guidance and, as important, avoid mistakes. The customer journey accelerates customer success by ensuring there is solid support every step along the way.

For any company focused on customer success, the customer journey needs to be easy and effective. Customers need be confident and excited about using your product. A key consideration is understanding your customer's goals and your business objectives to create a plan that aligns the two.

Here are the key steps to creating a win-win vehicle for the customer journey:

1. **Identify your customer's objectives:** The customer journey begins by identifying the goals and needs of your customers. Why did they buy your product? What are the challenges they are looking to address? What are their points of pain? Armed with this information, it will be easier to meet their needs, interests, goals and aspirations.
2. **Identify your business objectives:** Customer success happens when your organization is successful too. It means articulating your goals - faster adoption, increased retention, referenceable customers or higher revenue. An important part of this process is knowing what you want customers to do in order to achieve success.
3. **Map the journey:** It is important to think about how a customer experiences and embraces your product. For many companies, this is a challenge because they are so focused on developing the product. A better and more effective approach is being customer-centric by focusing on the customer and what they need to be successful.

By identifying the goals of your company and your customers, it is easier to create alignment within your organization to produce a win-win proposition - aka everyone gets what they need because there is a framework to drive the customer journey.



## Account Management Model

Another critical component of customer adoption and success is ensuring a company has the right resources and skills to support its customers. An account coverage model gives a customer success team the structure to drive customer adoption in the fastest and most efficient way possible.

An account coverage model identifies who is involved with a customer account. It delivers clarity about everyone's roles and responsibilities to ensure there is a focus on doing things that make your customers successful. An account coverage model eliminates duplicate work, avoids allocating too many people on an account, or worse, leaving a customer to fend for themselves if there are gaps in account ownership.

Here are some key considerations to embrace an account coverage model:

1. Itemize the skills needed to support the activities within each step of the customer journey. This creates alignment to drive customer success, and it ensures your people are focused on the work that matters.
2. Map out the skills to roles and responsibilities and then reference them against the roles within your organization. This makes it easier for everyone to know what they need to do and how each activity helps the customer reach their goals.
3. Once you know the roles required to drive adoption, outline when and how the roles phase in and out of the account to support the customer. This ensures that throughout the entire journey, the customer has the required resources (people and tools).

With a responsibility matrix mapped out, a company can plan how to resource an account. Will there be dedicated roles on the account or a mix of dedicated and supporting roles? Will there be a main point of contact throughout the journey or different ownership of the account along the way? Will all accounts be resourced in a similar manner or differently depending on your customer segments?

With an account coverage model, SaaS companies can drive customer adoption and success in the most efficient way possible.



## Measurement & Metrics

For SaaS companies, it is difficult, if not impossible, to help all of your customers all the time when the business is continually growing faster than resources. One of the keys to success is monitoring and measuring the health of your customers.

It is about having the insight to identify the customers that need help and, when that help is required. It gives companies a structured approach to customer success that pro-actively delivers value. As important, customer success teams are able to get ahead of the curve by resolving issues before they escalate into bigger problems.

The monitoring and measurement of customer success is a guidance and feedback system. It involves the operationalization of a company's customer success strategy to track the health and progress of your customers.

With clear and well-defined metrics, a company can ensure that customers are healthy and following the right track to adoption so they can be successful.

Monitoring and measurement provides real-time visibility into the customer journey. It allows a company to deliver the best customer experience and makes it easier to prioritize time and resources so every customer benefits from exceptional customer experience.

So how do companies monitor and measure their customer success?

1. Identify the customer journey. It is about having knowledge of the customer's path to success so you can identify the key metrics to make sure it is happening. It is also important to know when a customer is tracking to "unhealthy" so an early warning system allows for issues to be dealt with quickly before they become bigger problems.
2. Get a handle on your account coverage model. This delivers insight into the skills to support the key activities in the customer journey, as well as the team that will help the customer achieve success. It's about knowing who is accountable for the customer and when, as well as identifying ownership hand-offs along the way so that workflow can be managed and work prioritized.
3. Operationalize the journey into a tool to measure the customer base's health. This features key activities to support the different customer success phases, and the workflow of roles and responsibilities. This tool reports on the health of your customers and proactively notifies the account team when to assist a customer at key moments, or when a customer is trending towards a problem that could indicate an at-risk or unhealthy account.





## Conclusion

It is stating the obvious, but customer success involves a lot of moving parts.

SaaS companies that want to drive customer success and, at the same time, fuel their own success need to have the right people, processes and systems.

It means being clear about everyone's goals and expectations - not only customers but your company's as well. After all, customer success means happy customers and a vibrant business.

Having a well-defined, customer-centric, plan that addresses the different components that take customers from adoption to, ideally, retention, upsells and loyalty is essential to customer success.

In many ways, customers success is about having a well-defined path to success. It is something that happens because your company is focused on making sure the customer has a positive experience every step of the way. Customer success happens when a company makes a commitment to doing things that are right for the customer, in the right way, at the right time.

## About Amity

Amity's Customer Success and Lifecycle Automation platform is quick to implement and easy to use. It is the first platform to combine:

1. Customer Intelligence: Understand exactly what's happening with every customer, right now. Eliminate the need to switch between multiple data sources. It's easy.
2. SmartPlaybooks™: React to customer insights in real time, enabling proactive action in an automated, scalable and repeatable way.
3. Team Collaboration: Enables company-wide alignment, driving customer outcomes and coordinated action, while delivering extraordinary business results.

You need to reduce churn and deliver aggressive growth. Amity enables your SaaS business to improve conversion rates, drive adoption and deliver the customer outcomes that increase upselling and renewals.

Learn more at [www.getamity.com](http://www.getamity.com).





## About Kia CX Consulting

KIA CX Consulting accelerates business growth through Customer Experience innovation. Kia provides the leading methodology to establish a disciplined and sustainable CX framework that drives revenue, retention, and scale.

## About the Author

Kia Puhm is an entrepreneurial executive with 21 years of experience leading strategic corporate initiatives. She has held executive positions in customer success, services, and support at companies such as: Oracle, Eloqua, Adobe (Day Software), Intelix Technologies, and Blueprint Software Systems. Kia has pioneered the art of Customer Experience by leading businesses through the transition to customer-centric organizations. Her methodology provides clients with a disciplined and sustainable approach to increasing customer lifetime value & loyalty.

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