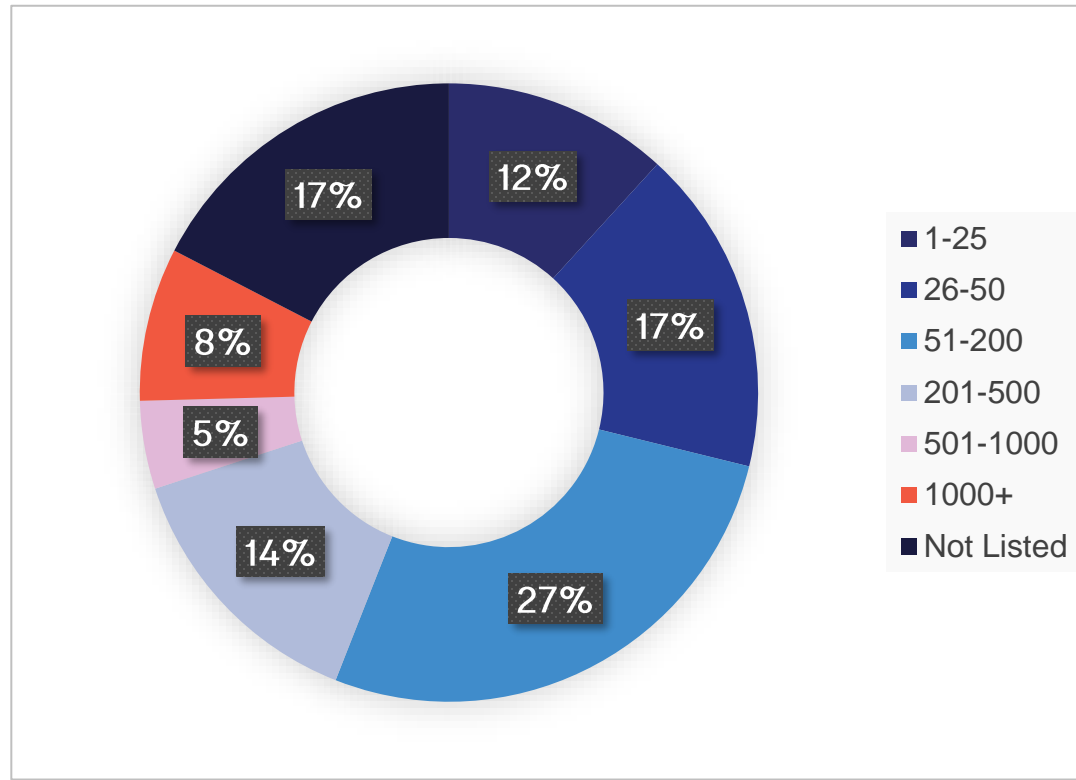# Our Presenters

Megan Macaluso

Vice President, Customer Success & Operations

ESG

Jay Nathan

Chief Customer Officer

Higher Logic

Our Survey Respondents
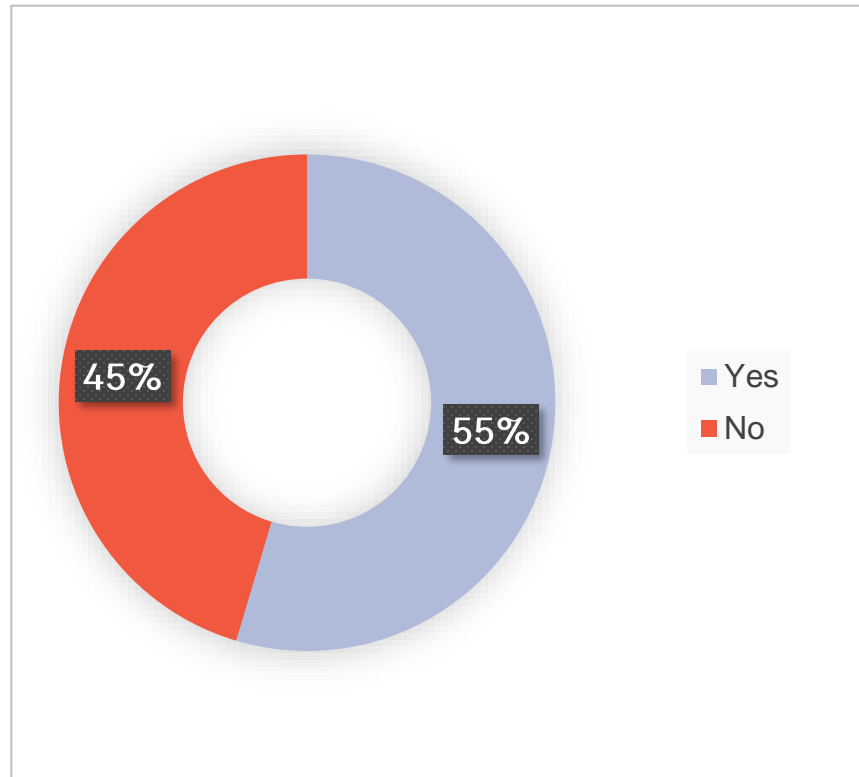
Number of Employees

- 1-25 — 12%
- 26-50 — 17%
- 51-200 — 27%
- 201-500 — 14%
- 501-1000 — 5%
- 1000+ — 8%
- Not Listed — 17%

Seniority Level

- C-level — 6%
- VP, SVP, or EVP — 14%
- Director or Sr. Director — 24%
- Manager or Sr. Manager — 41%
- Other — 15%
- Not Listed — 0%

FOUNDATIONS
Customer Success Leadership Study

CHURNZERO   esg   higher logic
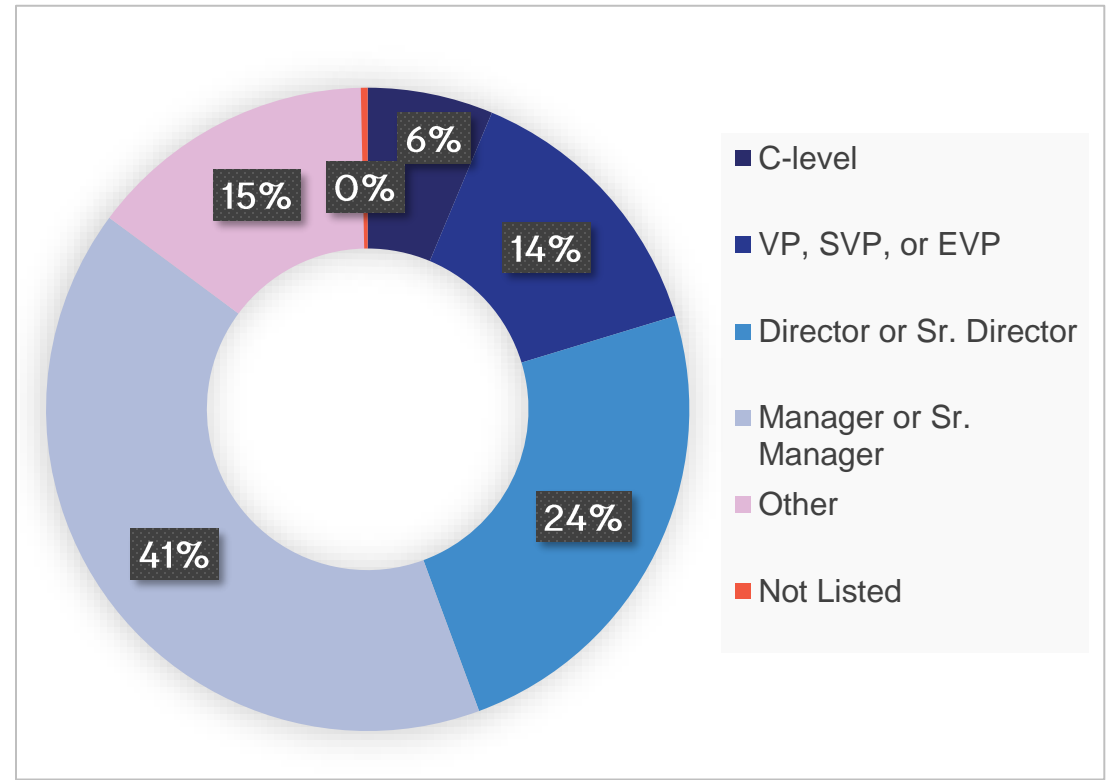
Influence within the Organization

Does your CS function report directly to the CEO?

All Respondents

- 45% No
- 55% Yes
- Yes
- No

By Company Size (Employees)

Legend: Yes, No

	1-25	26-50	51-200	201-500	501-1000	1000+	Not Listed
Yes	81%	70%	46%	42%	33%	31%	59%
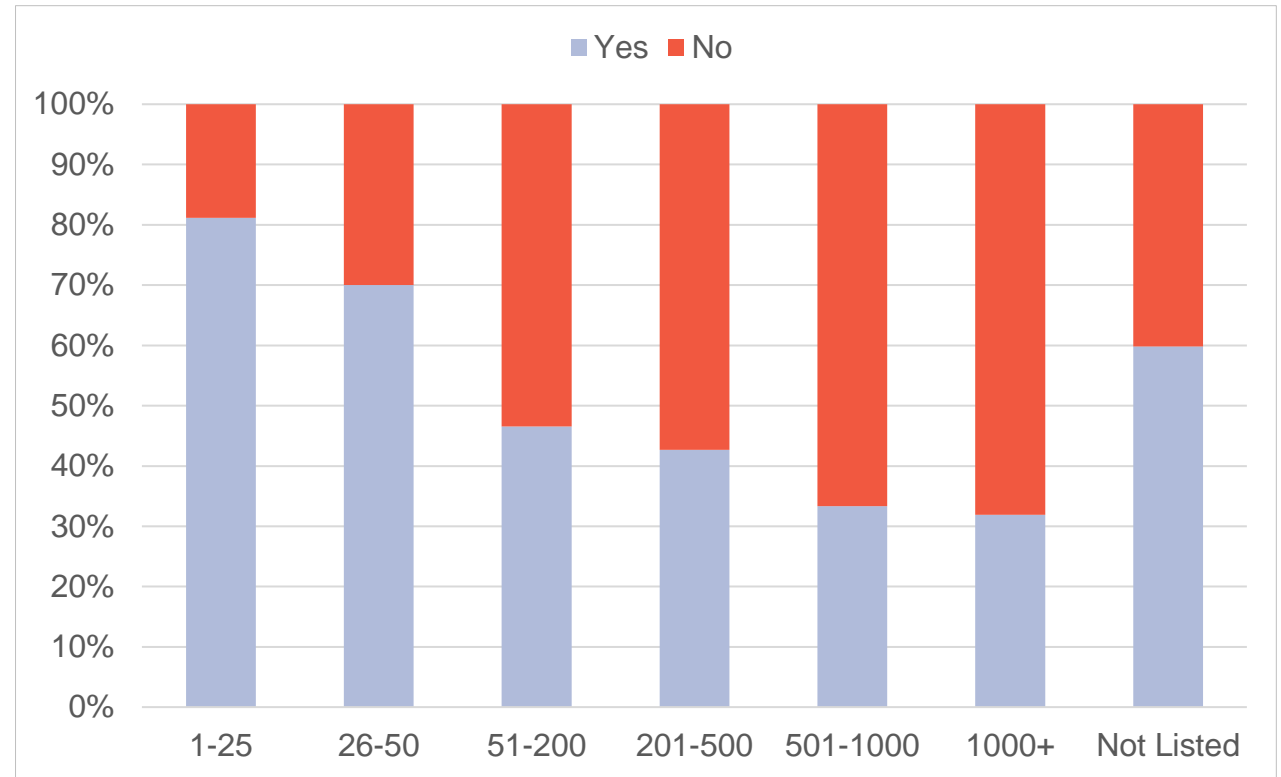
What is the highest CS leader in your organization?

- Chief Customer Officer
- Other C-level
- VP, SVP, or EVP
- Director or Sr. Director
- Manager or Sr. Manager
- Other

Chief Customer Officer: 10%
Other C-level: 7%
VP, SVP, or EVP: 38%
Director or Sr. Director: 29%
Manager or Sr. Manager: 13%
Other: 3%
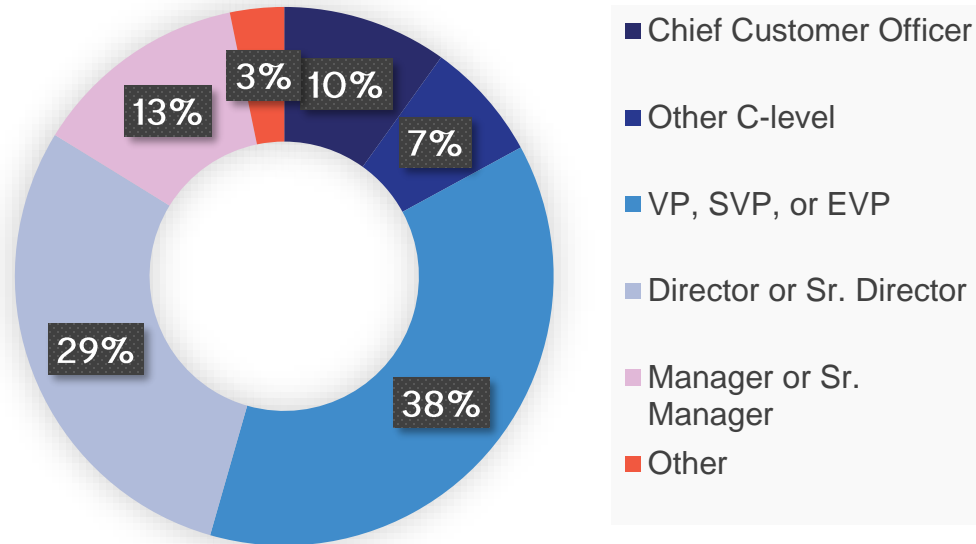
Does the CS leader have a seat at the executive table & the ability to create budget?

- Yes
- No

No 26%
Yes 74%

FOUNDATIONS
Customer Success Leadership Study
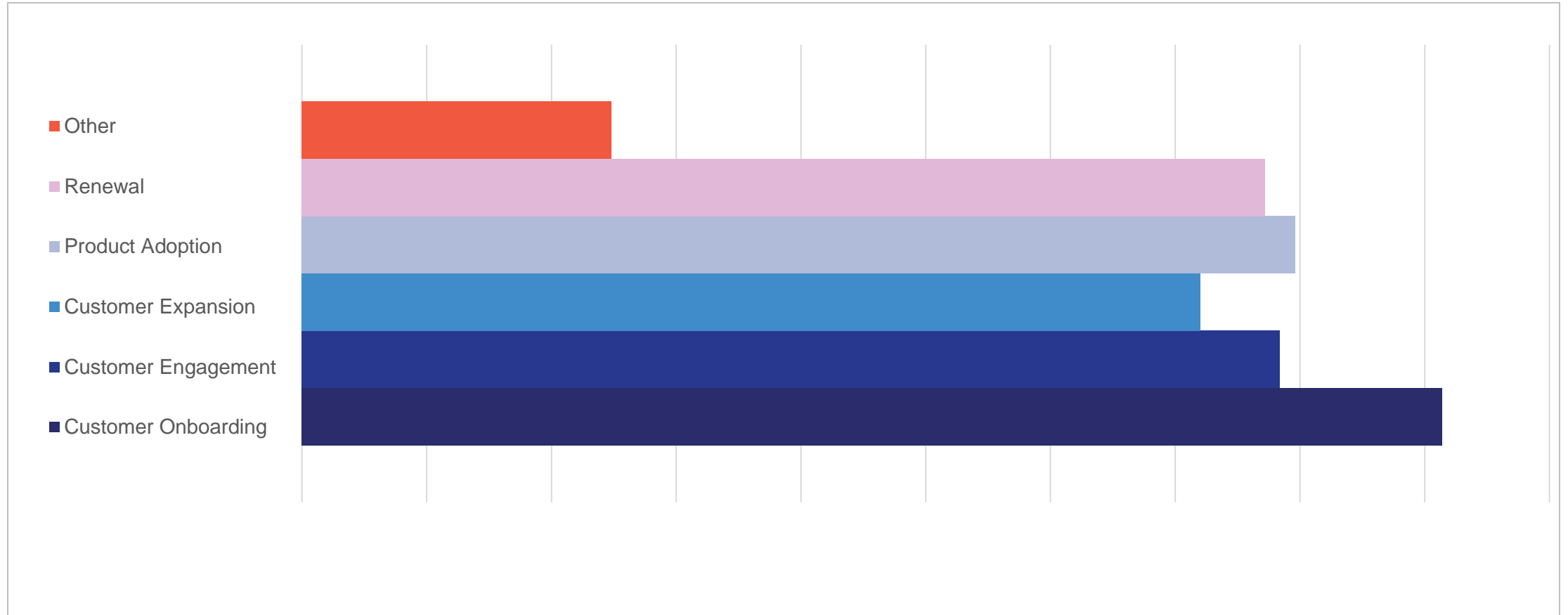
CHURNZERO   esg   higher logic
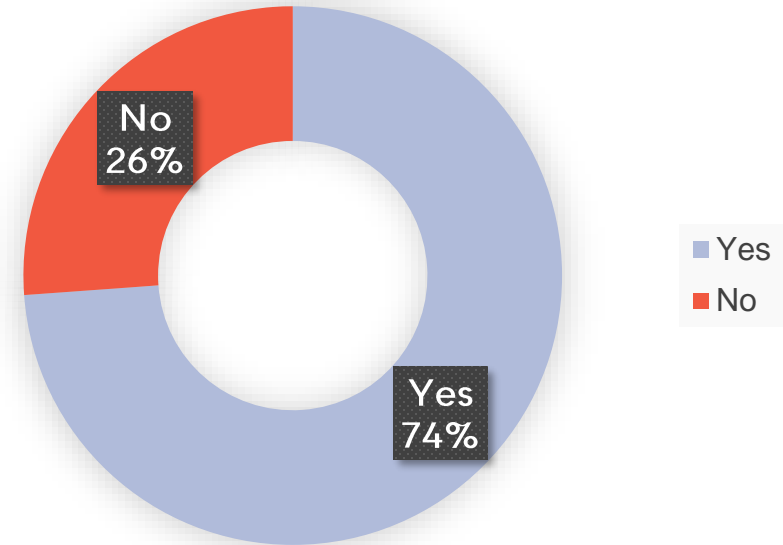
Audience Poll

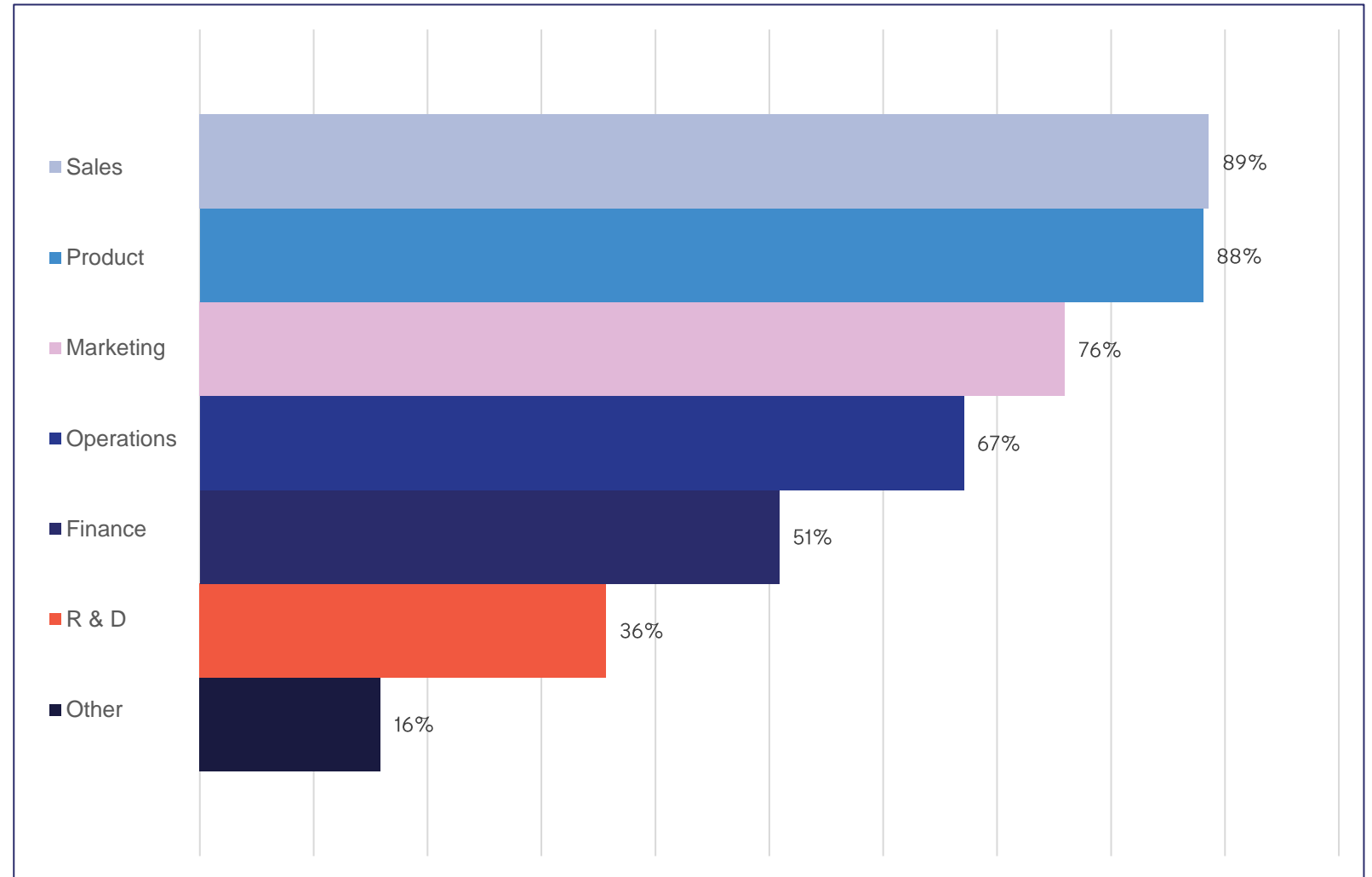Has COVID-19 impacted your ability to create budget?
- Yes, I had the ability pre-COVID, but no longer do
- Yes, I didn't have ability pre-COVID, but now do
- No, it has not changed
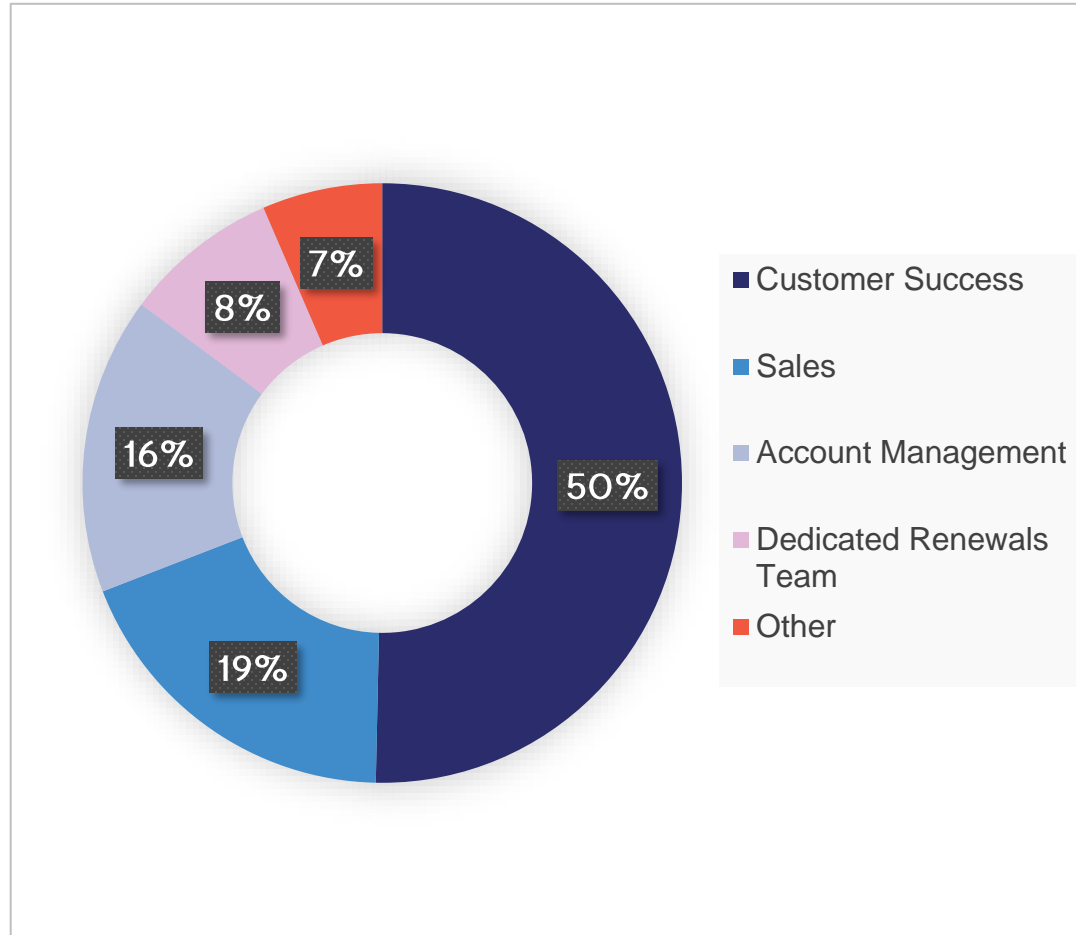
Organizational Alignment
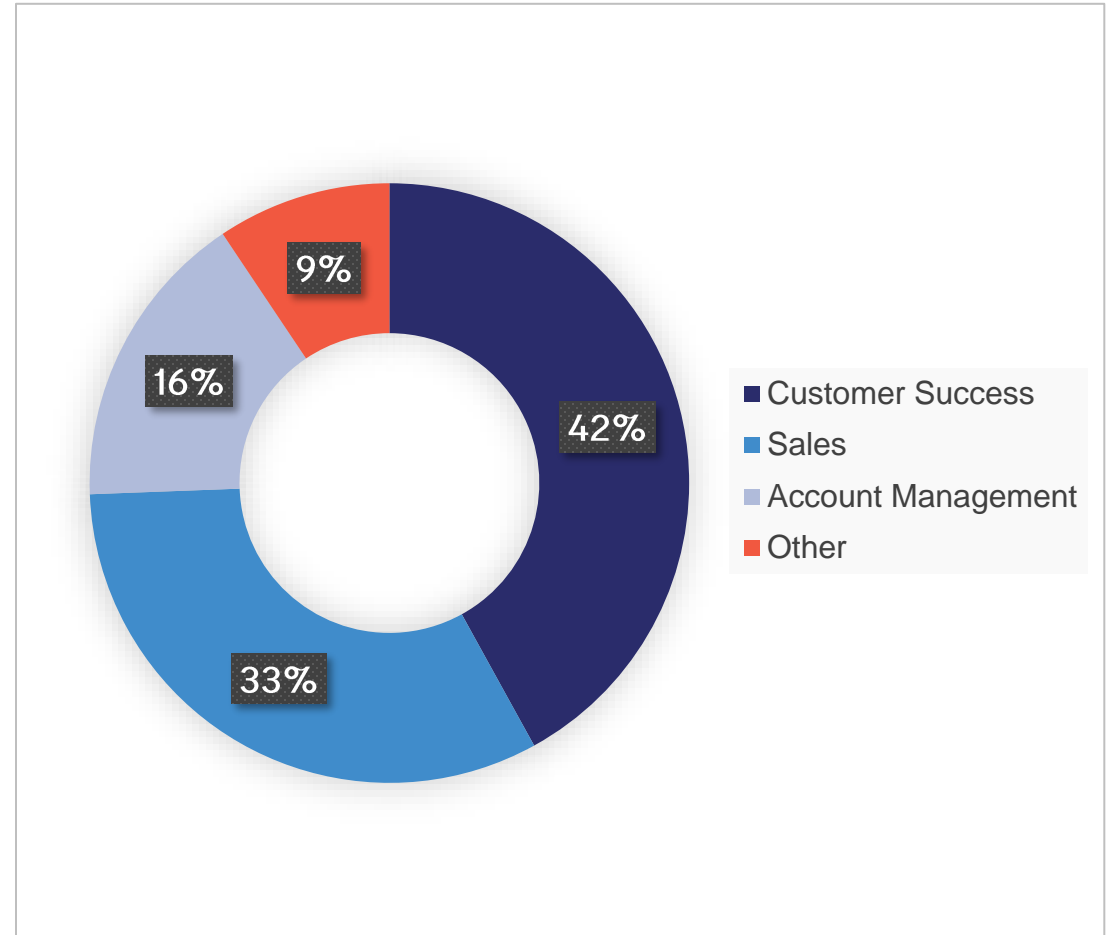
Which areas are tied to your organizational charter?

Legend (top to bottom):
- Other
- Renewal
- Product Adoption
- Customer Expansion
- Customer Engagement
- Customer Onboarding

Which departments do you work with on a regular basis to help meet your objectives?

- Sales — 89%
- Product — 88%
- Marketing — 76%
- Operations — 67%
- Finance — 51%
- R & D — 36%
- Other — 16%

Who owns customer renewals?

- Customer Success — 50%
- Sales — 19%
- Account Management — 16%
- Dedicated Renewals Team — 8%
- Other — 7%

Who owns customer expansion (up-sell/cross-sell)?

- Customer Success — 42%
- Sales — 33%
- Account Management — 16%
- Other — 9%

FOUNDATIONS
Customer Success Leadership Study

CHURNZERO   eSG   higher logic

Who owns customer renewals?

Who owns customer expansion (up-sell/cross-sell)?

Breakdown by number of employees

Legend (renewals):
- Customer Success
- Sales
- Account Management
- Dedicated Renewals Team
- Other

Legend (expansion):
- Customer Success
- Sales
- Account Management
- Other

FOUNDATIONS
Customer Success Leadership Study

CHURNZERO   ESG   higher logic
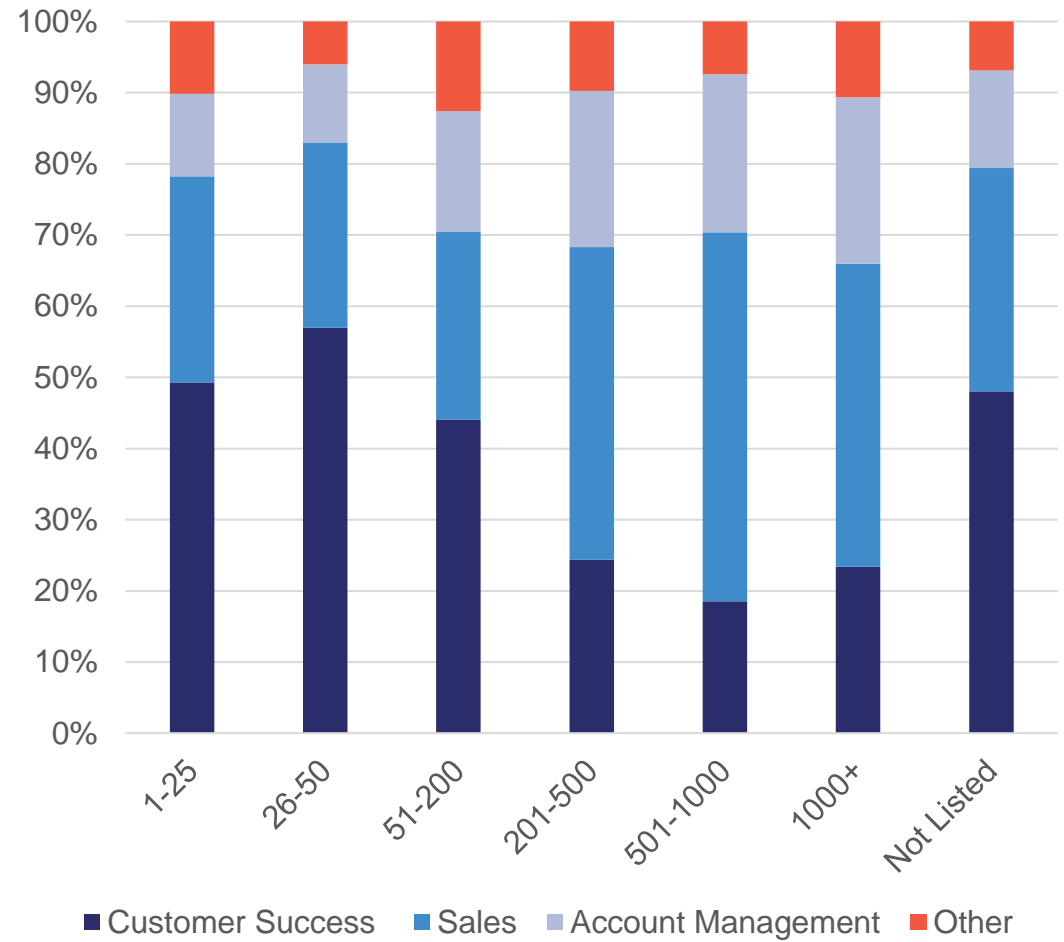
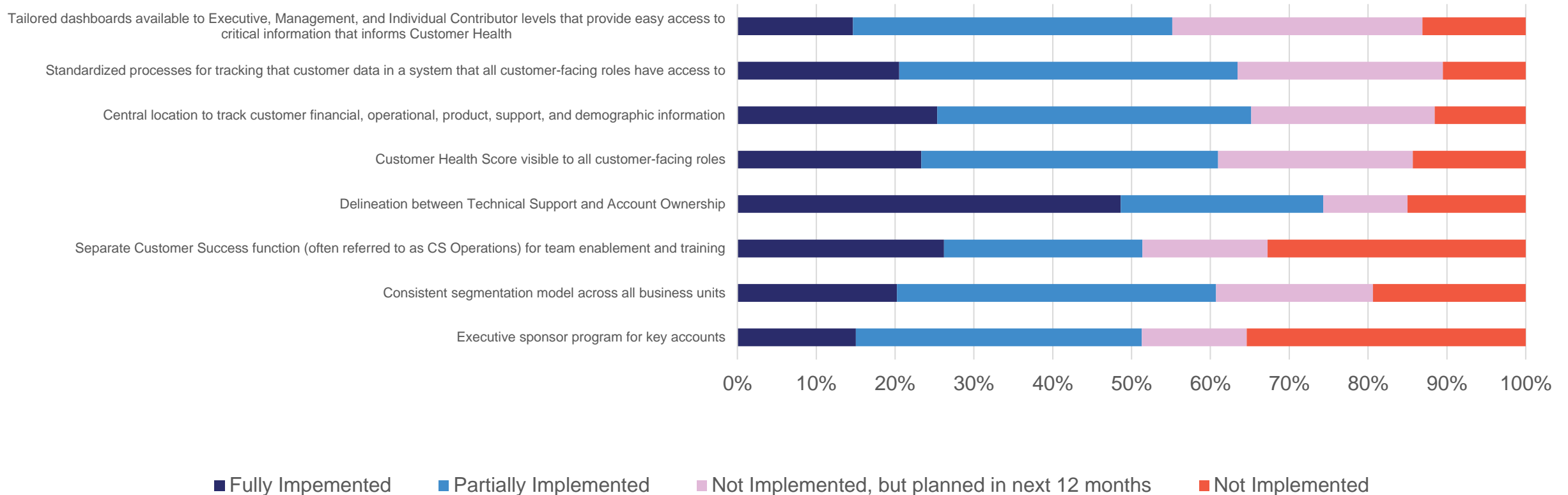# Customer Success Operations

What does your CS tech stack look like? Indicate the area(s) where you have a tool in place.

CRM	Support	CS Platform	Task/Project	CX/Surveys	Chat	Product	Customer Engagement	LMS	Other
81%	64%	47%	44%	39%	34%	28%	24%	22%	21%
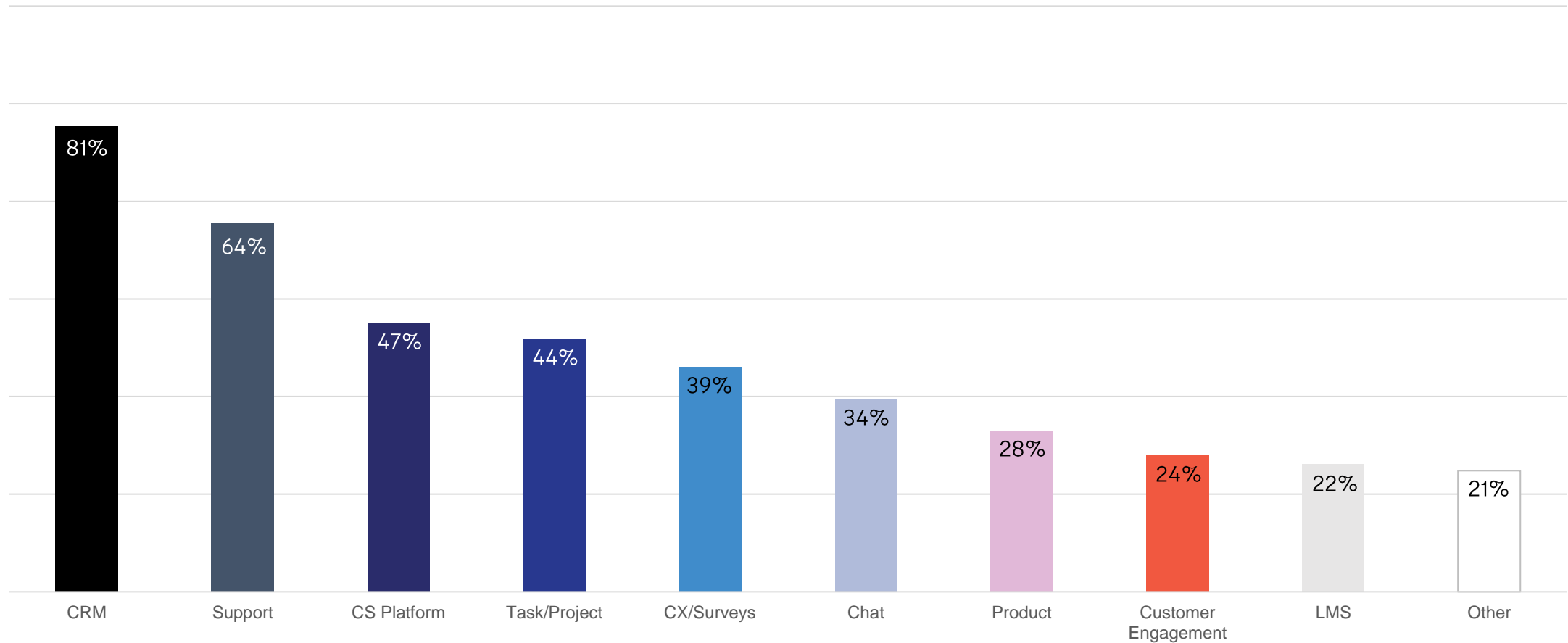
Which of the following strategies do you have implemented? Indicate the current status for each.

Horizontal stacked bar chart showing implementation status for eight strategies:

- Tailored dashboards available to Executive, Management, and Individual Contributor levels that provide easy access to critical information that informs Customer Health
- Standardized processes for tracking that customer data in a system that all customer-facing roles have access to
- Central location to track customer financial, operational, product, support, and demographic information
- Customer Health Score visible to all customer-facing roles
- Delineation between Technical Support and Account Ownership
- Separate Customer Success function (often referred to as CS Operations) for team enablement and training
- Consistent segmentation model across all business units
- Executive sponsor program for key accounts

Legend: Fully Implemented, Partially Implemented, Not Implemented, but planned in next 12 months, Not Implemented

If you have a customer community, what are the purposes of the community?

Legend:
- Support Tickets
- Q&A
- Customer Engagement
- Training
- Advocates
- Other
- N/A

Chart values: 17%, 15%, 20%, 11%, 16%, 1%, 20%

CHURNZERO   esg   higher logic
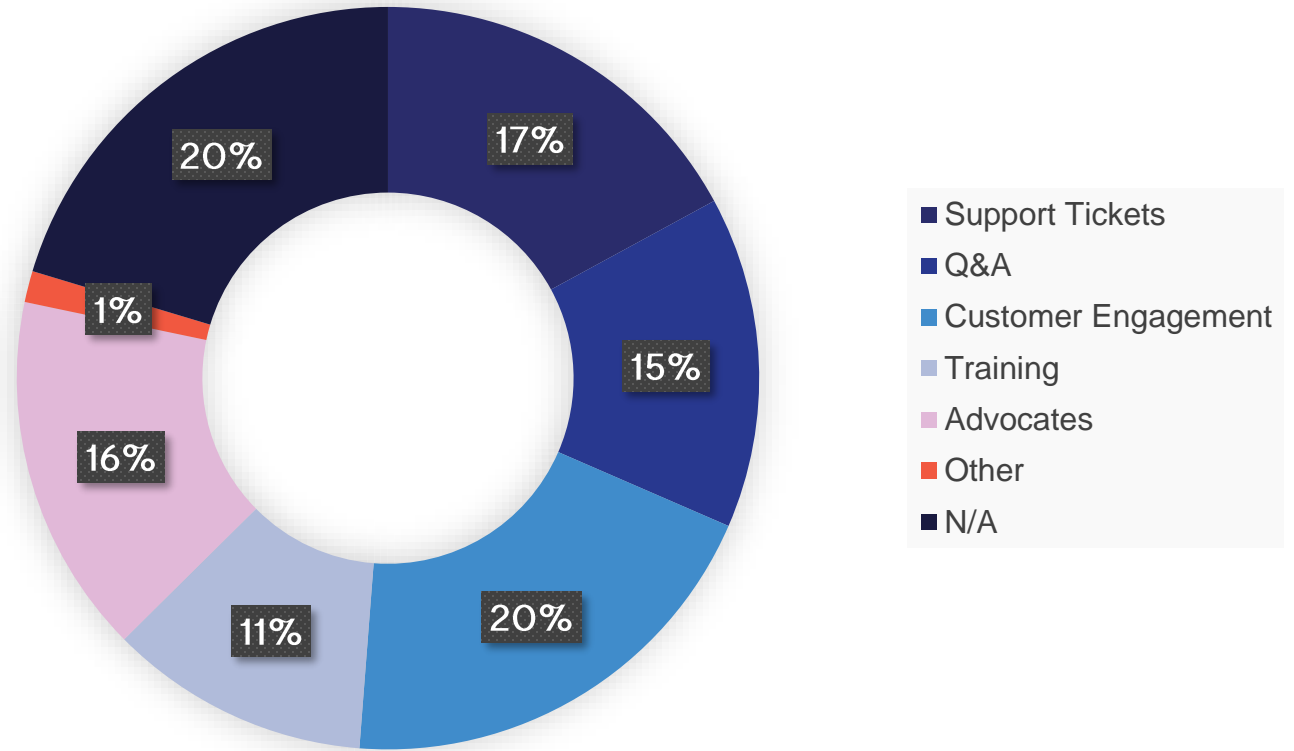
Goals & Aspirations

What are your top 2-3 priorities for the next board update?

If you asked someone on your team, "what is the big mission you're working towards?" what would you want their answer to be?

What is one thing you wish you and your team were doing better right now?

Questions?