Building a Customer Success Team

with Michelle Frechette
Director of Community Engagement, StellarWP

Director of Community Engagement
StellarWP

Hello!

I’m Michelle Frechette

I am here because I love the WordPress Community, and I love helping others grow their businesses.

It all started in 2018

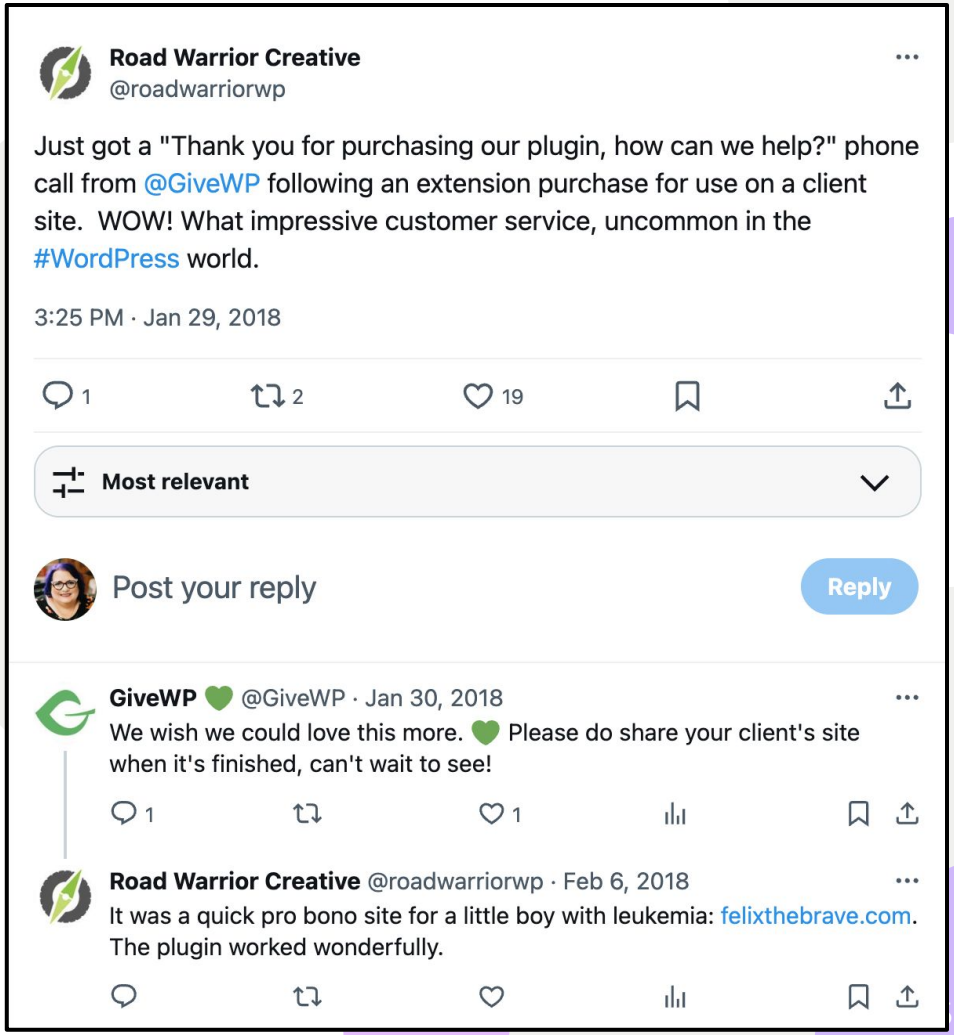
- GiveWP hired me to be the “Implementation Partner Manager”
- I studied support tickets
- I looked for gaps
- I looked at Churn Buster and what it did
- I started calling customers about lots of things
    - New Purchases
    - Renewals (and renewal failures)
    - Disputes

Customers Responded

- Some hung up on us
- Some sent us to voicemail - then called us back
- And some had great conversations with us
- And most we helped in some way or other

Customers Responded

- And some tweeted about us



So what is (and what isn't) Customer Success

What isn't Customer Success?

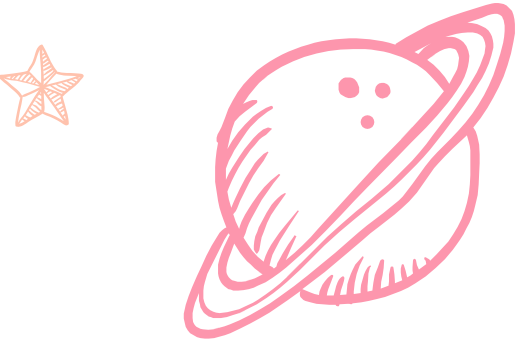
- It's not support (exactly)
- It's not sales (really)
- It's not marketing (but it kinda is)

What is Customer Success?

- It's support adjacent
  - Help your customers find what they need
- It's sales adjacent
  - Are we a good fit for the customer?
- It's marketing adjacent
  - We help marketing understand the customer
  - We help the customer understand the product
- And it's being a cheerleader
  (and sometimes hand holder)

What is Customer Success?

- It’s definitely communication
- It’s definitely some onboarding
- It’s definitely some hand holding
- It’s definitely a lot of celebrating
- It’s definitely tied to your own income



How Your Customers' Success Is Your Success

Successful customers = happy customers

Happy customers = renewals/new projects

Happy customers = referrals

What Works vs. What Helps

Good. Better. Best.
Never rest, until your
Good is Better, and
your Better is Best.
~Mother Goose

When we move from what works to what helps, we move from satisfied to delighted.

Satisfied

Satisfied customers might come back, but they also might look for the next best deal, or a cheaper solution.

Delighted

Delighted customers become brand loyal, and in turn, brand ambassadors. These are the customers who sing your praises to others, and recommend you to others.

When you delight customers...

- Sales become easier.
- You sell to clients who are a good fit.
- Relationships are built.
- Renewals are seamless.
- Recommendations & Testimonials abound.
- Disputes are fewer.
- Your bottom line is better.

Let's look at 5 ways to delight customers...

1

Have a product or service that is worth paying for ... and paying for again.

Maintaining a customer is less expensive than attaining a customer

When people buy our products and services, we celebrate - we should celebrate renewals even more!

Good Product/Service

Customers will look for other good products/services that will beat your price

Great Product/Service

Customers will stay rather than take the time and effort to move elsewhere and build a new relationship.

After a renewal is a great time to do some outreach!

2

Be human

(even when you're using AI)

Real relationships happen between people, not between a person and a business

Humans are relatable

Businesses are impersonal

Would you rather chat with a bot, get a recorded message, receive an automated email?

Humans make a difference

Or chat with a human, get a person on a phone call, and get an authentic email reply?

Outreach & Availability

- Don’t wait until a customer has a problem, do periodic outreach to check in and see how they’re doing
- Proactive check-ins delight customers (most of the time)
- Take calls, answer email, but within boundaries
    - Not personal phone numbers
    - Not outside of work hours
    - Set appropriate expectations in your contracts and communications

3

Invest in the tools and people you need to support your clients in a human way

Hiring people and then not giving them the tools to do their job is like asking a surgeon to remove your child's tonsils with a spoon on your kitchen counter.

It's not advised.

Tools for Human Productivity

(But ask your team what they need to feel successful, too)

- Phone numbers that aren't their personal numbers
  (I have used aircall.io for my team in the past, and Google Voice for personal clients)
- Email ticketing system that still allows personalization
  (HelpScout, FreeScout, ZenDesk...)
- Scripts that they can use for calls and emails when needed
- A handbook to help understand tone and navigate sticky situations

Tools for Human Productivity

(But ask your team what they need to feel successful, too)

- A CRM for tracking and email automation (Hubspot, ActiveCampaign...)
- Interoffice real time communication (Slack, Teams...)
- Access to social accounts as necessary (specifically to Facebook groups)
- Other things like Zoom accounts, headphones, mics, comfy chairs, etc. It all matters.

Value Added

What can you do to add value?

- Newsletters with ideas on how to be successful with your product
- Blog posts
- Webinars/Training/Workshops
- Podcasts
- Social media shout-outs, tips, ideas
- Consultations on their services, website, products

4

Don’t say “thank you” (too much)

Some things are so common they lose meaning and aren't even noticed

Why I Stopped Saying "Thank You"

(Or rather, when I do, and when I don't)

- I don't thank people for their business
- I don't thank people for using my services
- I don't thank people for asking me questions
- I don't thank people for meeting with me (unless I invited them)
- *I do thank people for giving me something I ask for*
- *I do thank people for grace when needed*
- *I do thank people for generosity*

What I say Instead of “Thank You”

Use empowerment language

- Congratulations on your purchase of...
- Welcome to the _____ community
- I'm so excited for you!
- Amazing things are about to happen
- Congratulations on taking the next step in your success
- Let’s get started on building your...

5

Don’t apologize unless you did something wrong

Apologies are not fixes, but they can be liabilities

Why I Stopped Saying "I'm Sorry"

(Or rather, when I do, and when I don't)

- I don't apologize when our product is not a good fit
- I don't apologize when I have to say "no"
- I don't apologize when the customer's mistake leads to issues
- I don't apologize when it wasn't our/my fault
- *I do apologize if we made a mistake*
- *I do apologize if I'm late to a meeting*
- *I do apologize when it's **appropriate** to apologize*

Instead of "I'm Sorry"

Use language that fits and even helps

- It's unfortunate that this didn't work out
- It doesn't seem that we're a good fit for your needs, but here's someone/something that might work for you
- I'm unable to process a refund for you
- I see what happened, and we can help fix it
- Although this wasn't caused by us/our team/our product, let's see if we can help you find a solution

Customer Success Might Look Different for Your Team

Some things might not work, based on...

- Team size
- Customer base
- Company protocols

So use the things you can - and work to create a customer success oriented approach.

And did I mention to be human?

Thank you for being here!

Any questions?

Connect with me through MeetMichelle.online