

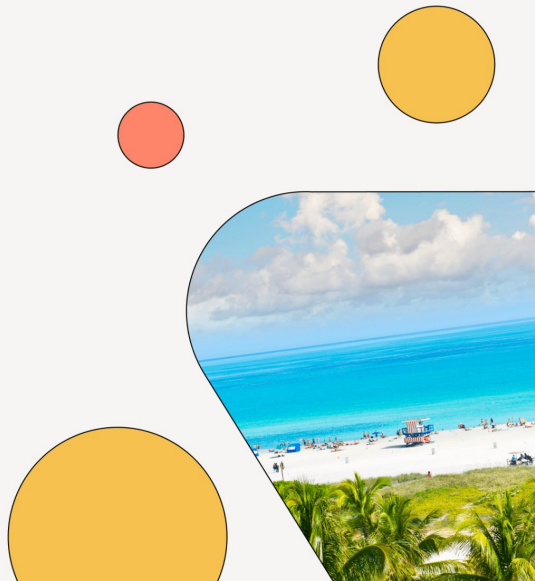
# Make it Count: 5 Metrics That Matter

**Ella Eng**

Customer Success Director,  
Enterprise Team Lead  
Totango

**Rachel Timman**

Sr. Strategic Program Manager  
Varicent





**Ella Eng**  
Customer Success Director,  
Enterprise Team Lead  
Totango

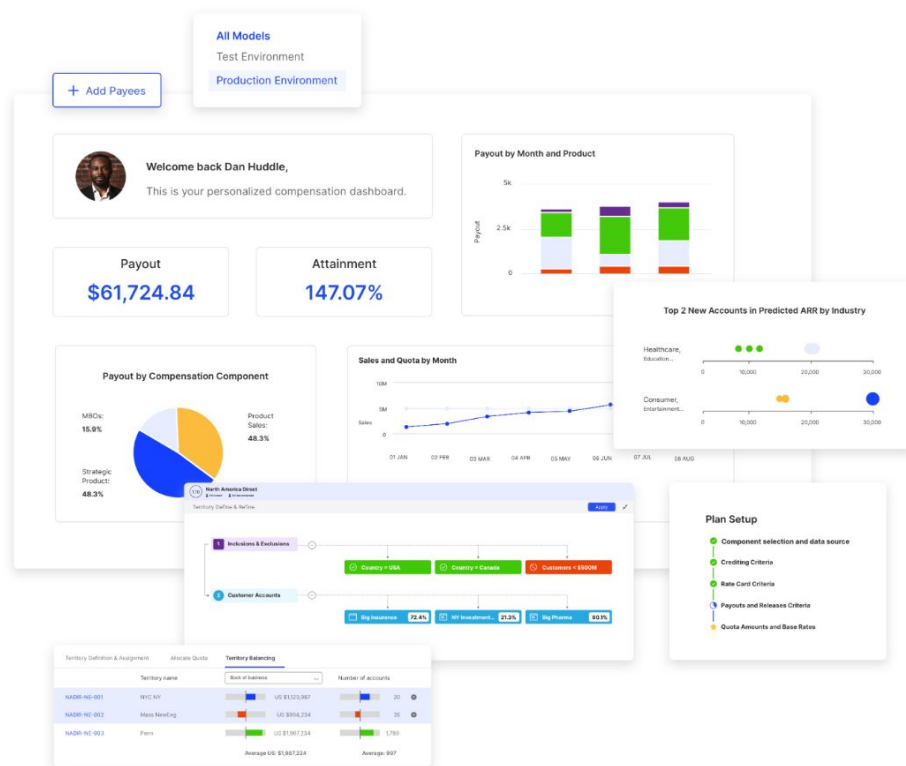


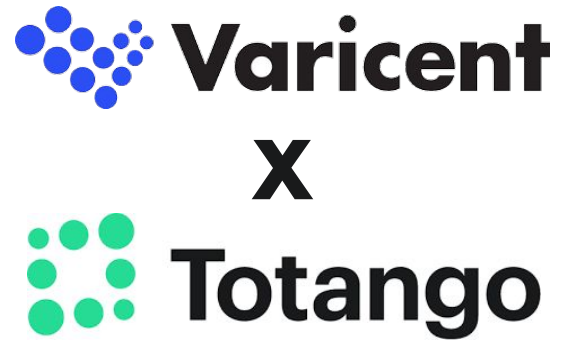
**Rachel Timman**  
Sr. Strategic Program Manager  
Varicent



# Optimize revenue. Drive growth. Increase efficiency.

From quotas to sales and compensation, Varicent enables companies to drive high performance and maximize revenue by providing vital data, insights, and tools through our suite of solutions.





**5**

Customer  
Success Teams

**3**

Customer Success  
Ops Team members

**4**

NPS Cycles

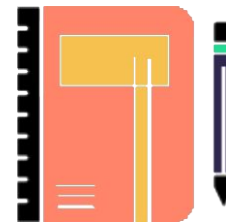
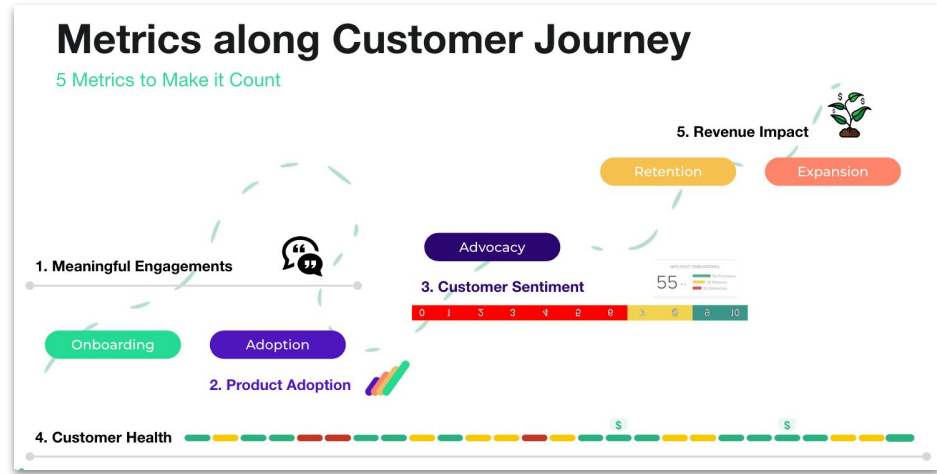
**50k+**

Emails Sent

make it count

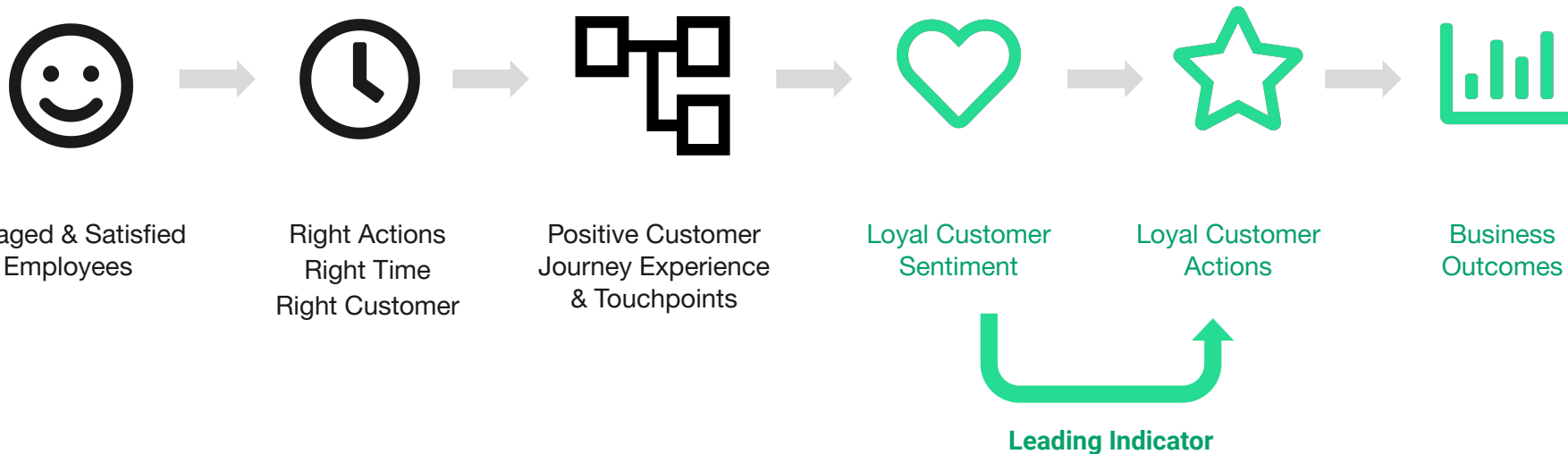
5

METRICS  
THAT  
MATTER

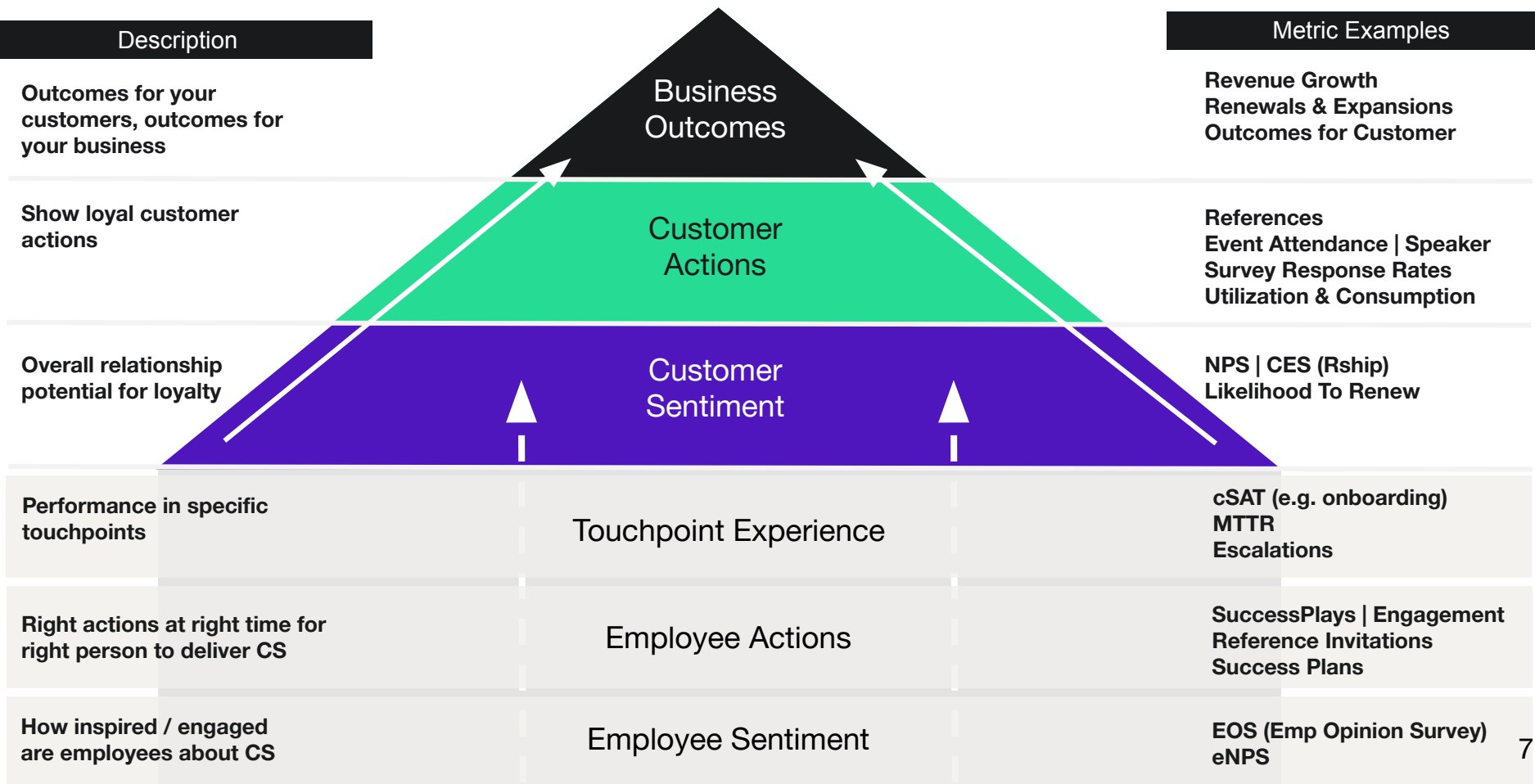


Metrics that  
Matter Handout

# Business Outcomes Supply Chain



# CS Metrics Architecture



# Metrics that Matter (along Customer Journey)

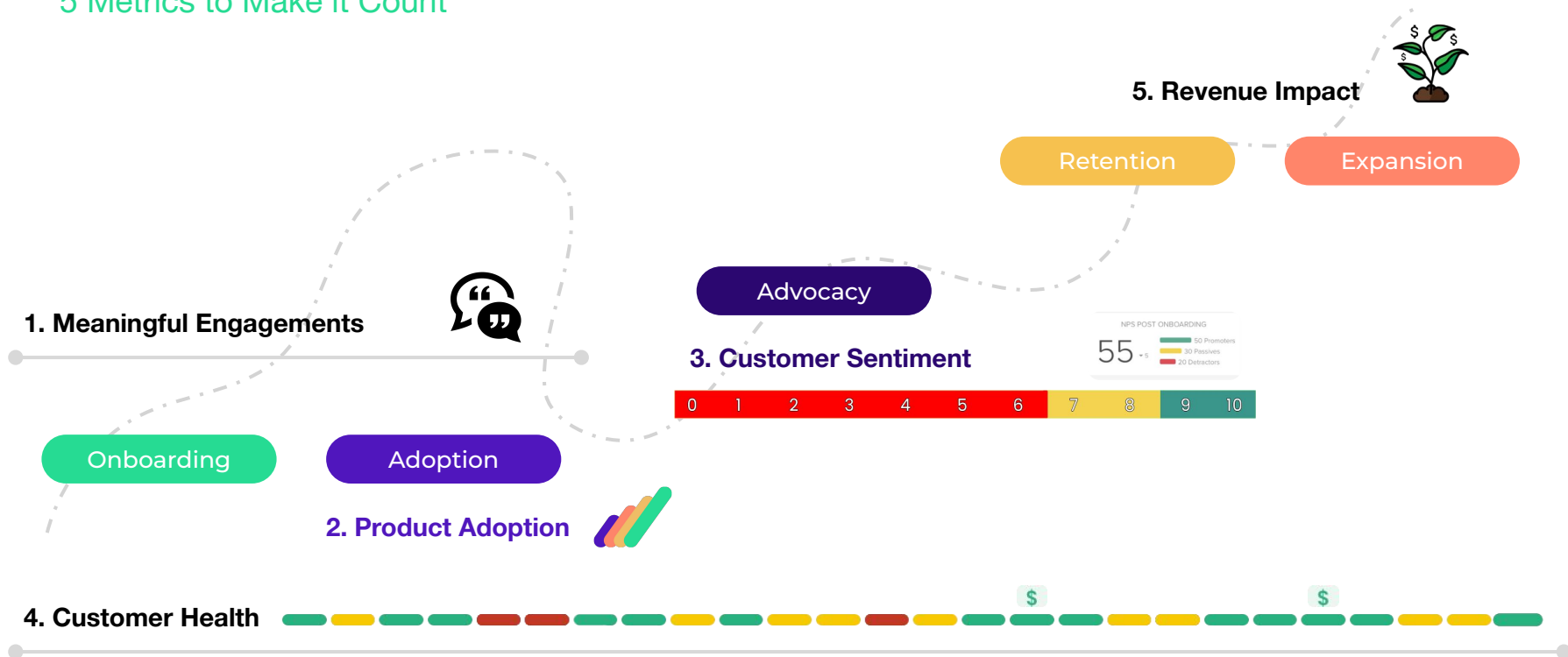
&





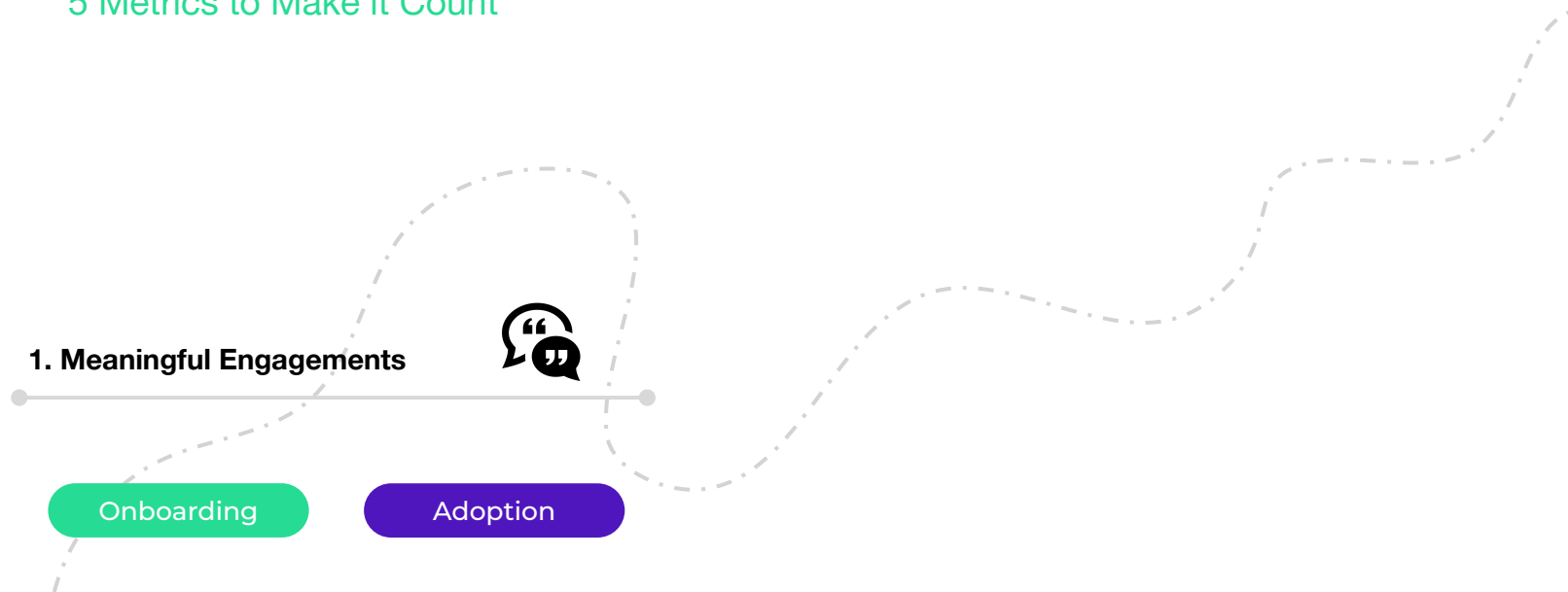
# Metrics along Customer Journey

5 Metrics to Make it Count



# Metrics along Customer Journey

5 Metrics to Make it Count



# Journey: Meaningful Engagements

GOAL

Ensure [Cadence] Meaningful Touchpoints with [Segment] Customers



Align Cadences to Engagement Model

→ Tier 1 | 2 | 3

Customize: “Meaningful” for Organization

# 3036

**Touchpoints  
logged since  
January 2022  
by 20 CSMs**

## 151

Average touchpoints  
logged per CSM

## 8

Average touchpoints  
logged per Account

## 1753

Meetings &  
Phone Calls

## 1283

Emails & Internal  
Notes



**Chris Longo**

Director Customer Success,  
Enterprise & Strategic  
Accounts

**“My team owns 300+ accounts. When I start my day in the Totango timeline, I am able to catch up on customer calls that happened, usage alerts, and new NPS scores. I feel keyed into my team and we save time in our 1:1 meetings. I have so much context into what is going on at that account with a quick read of it’s timeline.”**

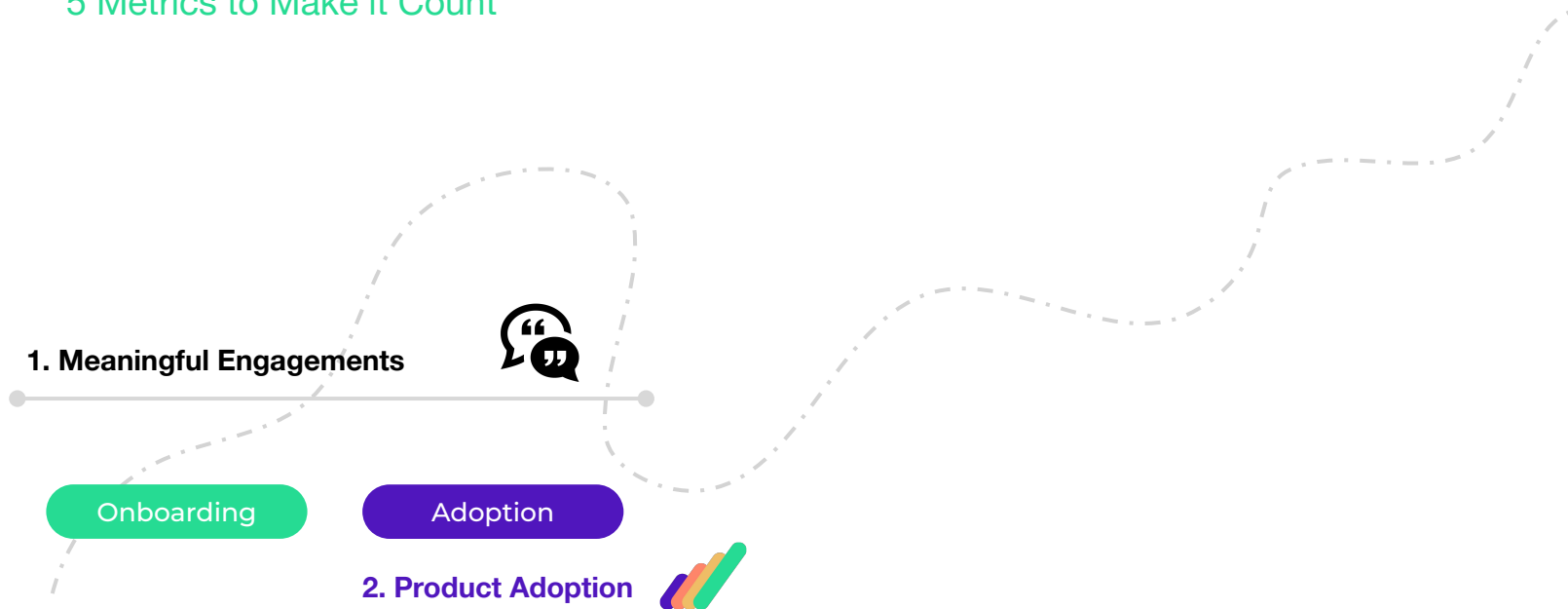
# Metrics: Part of a Journey

Taking Metrics to the Next Level



# Metrics along Customer Journey

5 Metrics to Make it Count



GOAL

Ensure High License Utilization and Consumption

# Product Adoption

SuccessBLOC

Average License Utilization

Last 14 Days

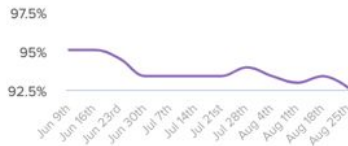
63.43% ▲ +1.2

Target: > 85

All Post-Onboarding

Trend on License Consumption

Enabled Licenses / Purchased Licenses



All Paying

Median Num. Consumed Licenses

Enabled Licenses / Purchased Licenses

93%

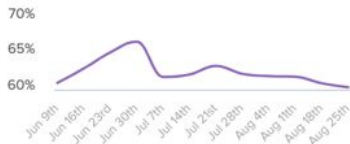
Target: > 95%

All Paying

2

Trend on Average License Utilization

Last 14 Days



All Paying

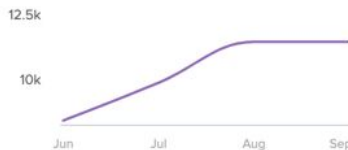
- Ensure your Customer are utilizing your Platform & Services
- Special Focus on “Sticky” Features

GOAL

Increase [Feature / Module] Adoption

Total [Feature / Module] Usage

Sum of all customer usage



All Post-Onboarding Products

Median Nbr of [F/M] Usage per Customer

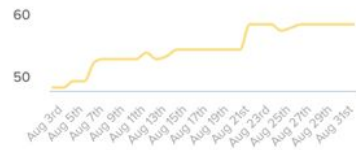
58

Target: > 10

All Post-Onboarding Products

Median Nbr of [F/M] Usage per Customer

Post-Onboarding Accounts



All Post-Onboarding Products



# Varicent Product Adoption

From a Hands on  
Workshop to a video series  
email campaign to an  
increase in # of reports  
created by a new product  
feature

**119**

Workshop  
Attendees

**6**

Video Emails

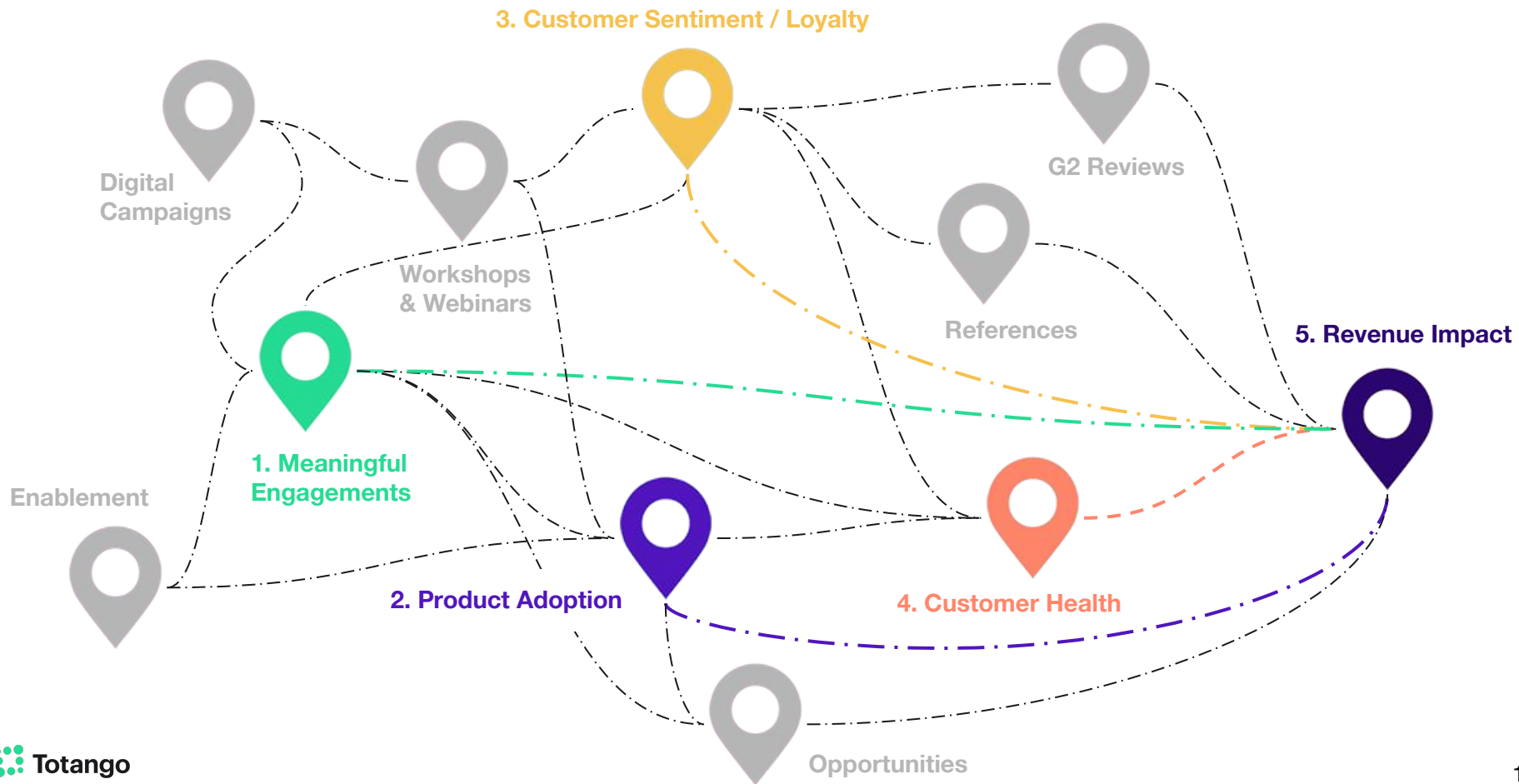
**1532**

# of new reports  
created in the new  
feature

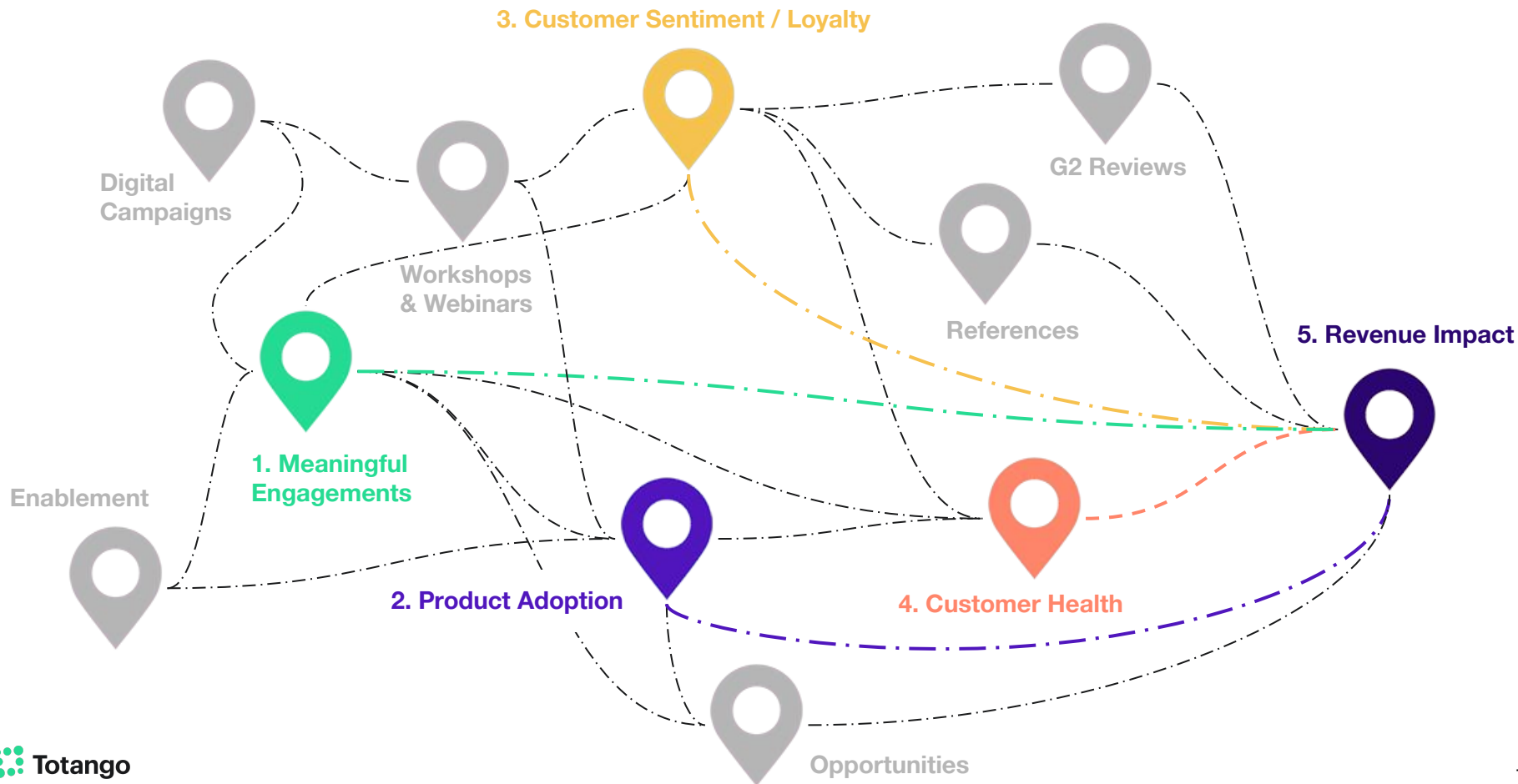
**2x**

Accounts with more  
than 2 reports in  
new feature

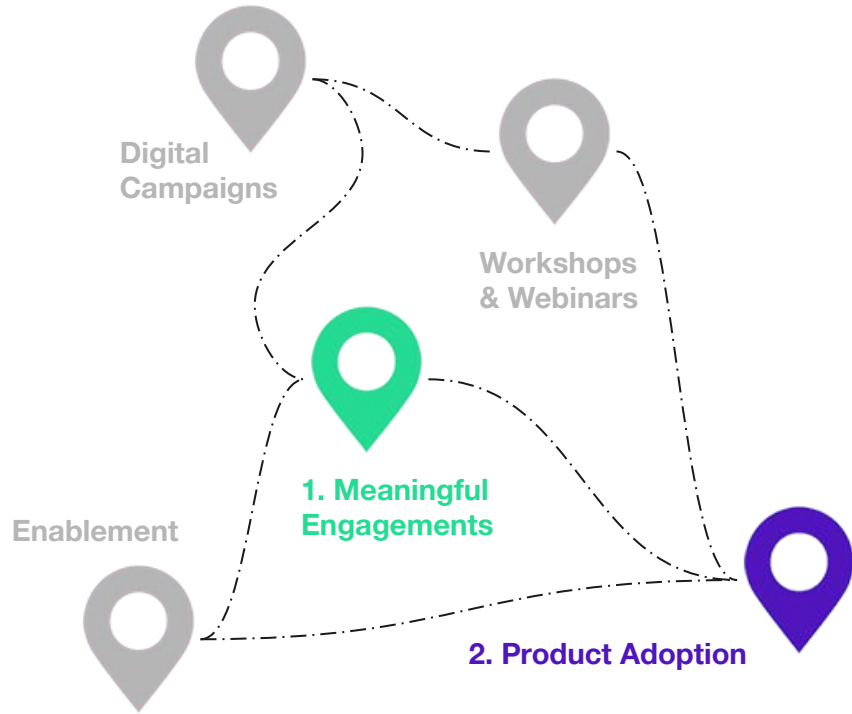
# Network of Metrics



# Network of Metrics

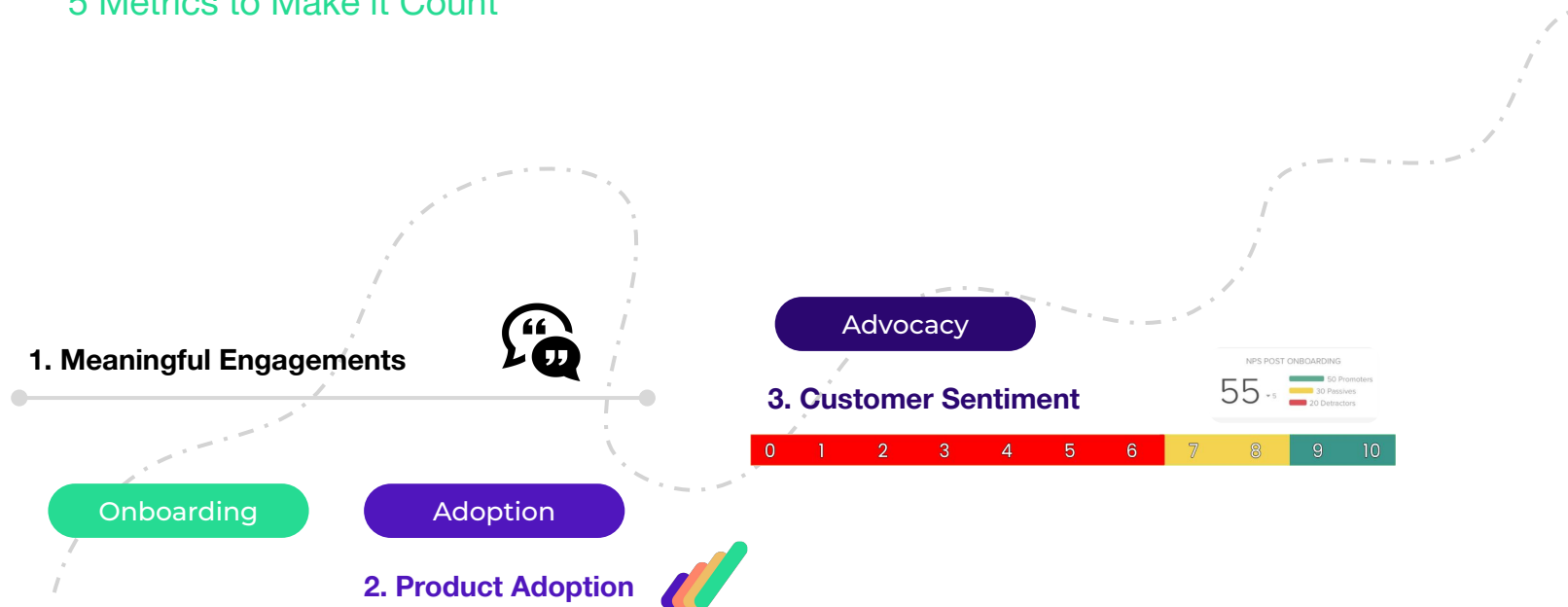


# Network of Metrics



# Metrics along Customer Journey

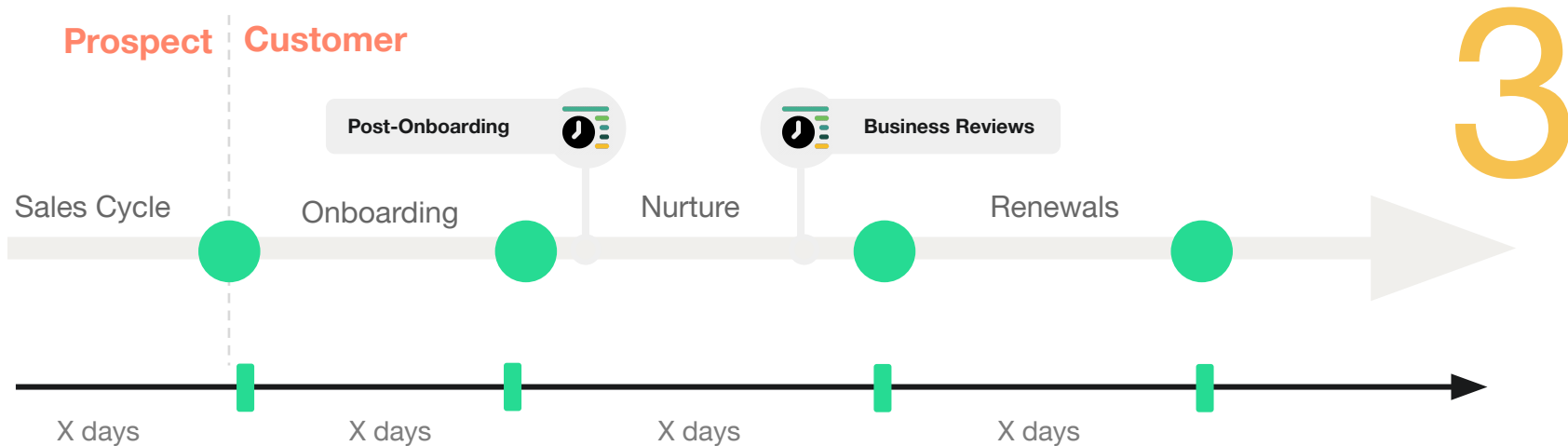
5 Metrics to Make it Count



# Surveys across Customer Lifecycle

## NPS<sup>®</sup> Survey

**Loyalty** or **relationship**-based surveys are sent periodically to measure the loyalty of your brand



## CSAT Survey

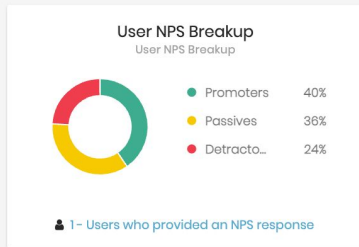
**Transaction** surveys are more commonly used to measure the **experience of a recent transaction** or service

# Customer Sentiment: NPS

Relationship / Loyalty

# 3

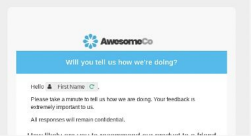
Drive best in class customer loyalty



Listen

1: Listen: NPS Survey

Accounts 1



Gather customer sentiment using NPS on a recurring cadence

Recurring Quarterly

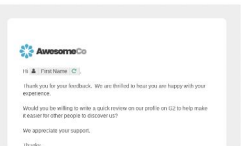
Draft

+ Add 1 Card

Close the Loop

2A: Close The Loop With Promoters

Users 2



Target Promoters and request them to promote any online presence

Ongoing Start Now

Draft

+ Add 2 Cards

Interpret & Analyze

No Cards

Share & Take Action

3A: Take Action: Promoters -> References

Users 2

Task: Work with Marketing for Customer Advocacy

Inactive

3B: Take Action: Plan for Passives -> Promoters

Users 2

Task: Convert Passives to Promoters

+ Add 3 Cards

# Varicent NPS

## NPS Collection

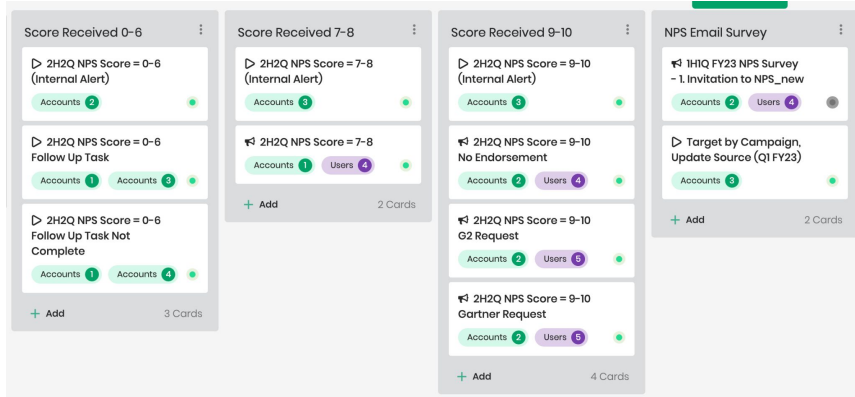
- **In Product**  
Appcues
- **Ticket CSAT**  
Salesforce
- **Email Campaign**  
Totango

## Data into Totango

- **Totango User Attributes**

## Close the Loop

- **0-6 Score**  
Internal alert & task assigned to the CSM to give a personalized response
- **When task is complete**  
Set an attribute on the user
- **If attribute has no value 2 days after score submission date**  
Assign a task to the CSMs manager to follow up with the customer
- **7-8 Score**  
Internal alert & email to customer asking what it would take to get to a 9 or 10
- **9-10 Score**  
Internal alert
- **If customer cannot give endorsement**  
Email with a thank you
- **If customer has not given a G2 review or review date was over 6 months ago**  
Email requesting a G2 review
- **If a G2 review has been given in the last 6 months**  
Email requesting a TrustRadius review

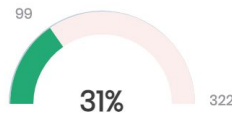




# 23 G2 Reviews from happy customers

Varicent had a goal to get over 200 4+ reviews in 6 months, and 10% of those reviews came from automation

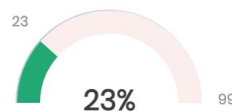
% Users Who Clicked G2 Button  
Out of Opened Users



Engaged with G2 Button - All

Users Opened G2 Email

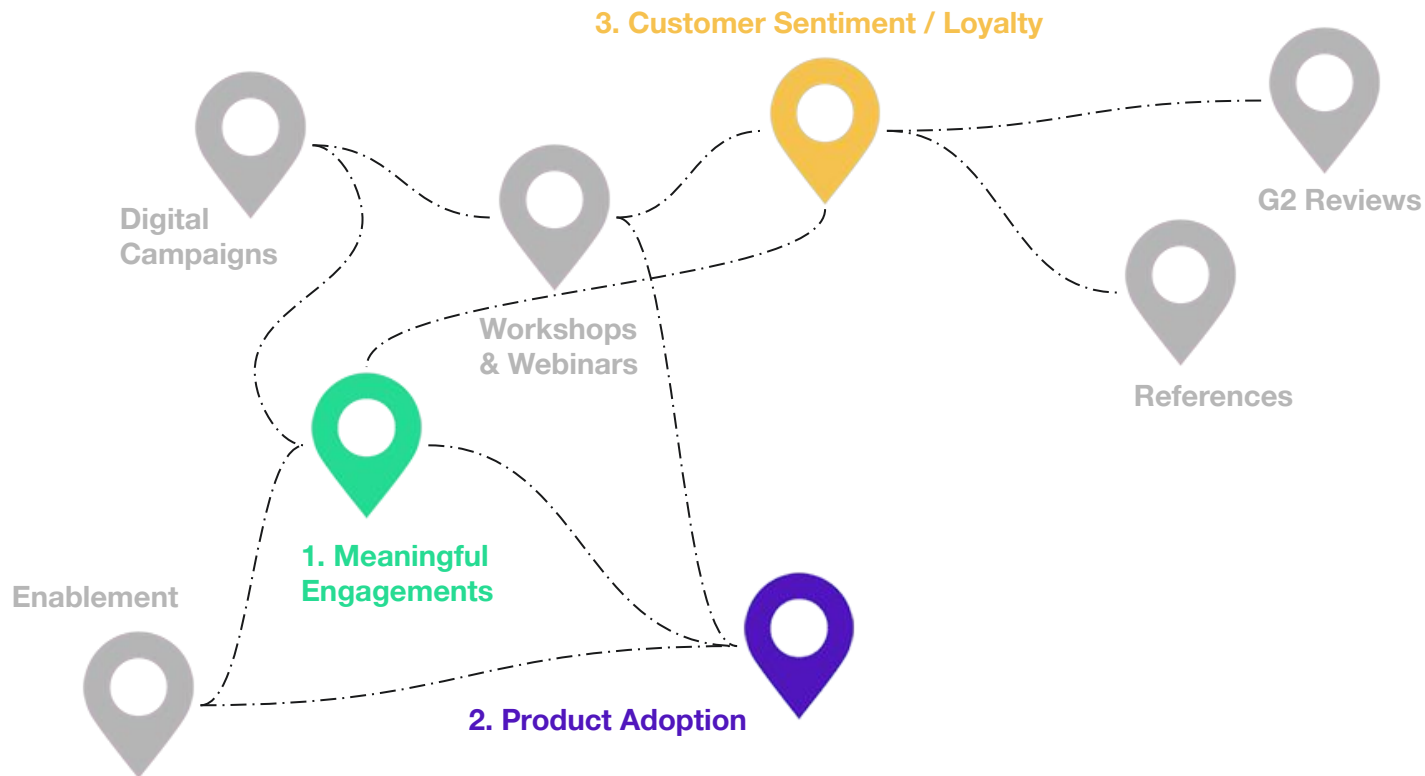
% Users Who Provided G2 Review  
Out of Engaged Users



Users Provided G2 Review

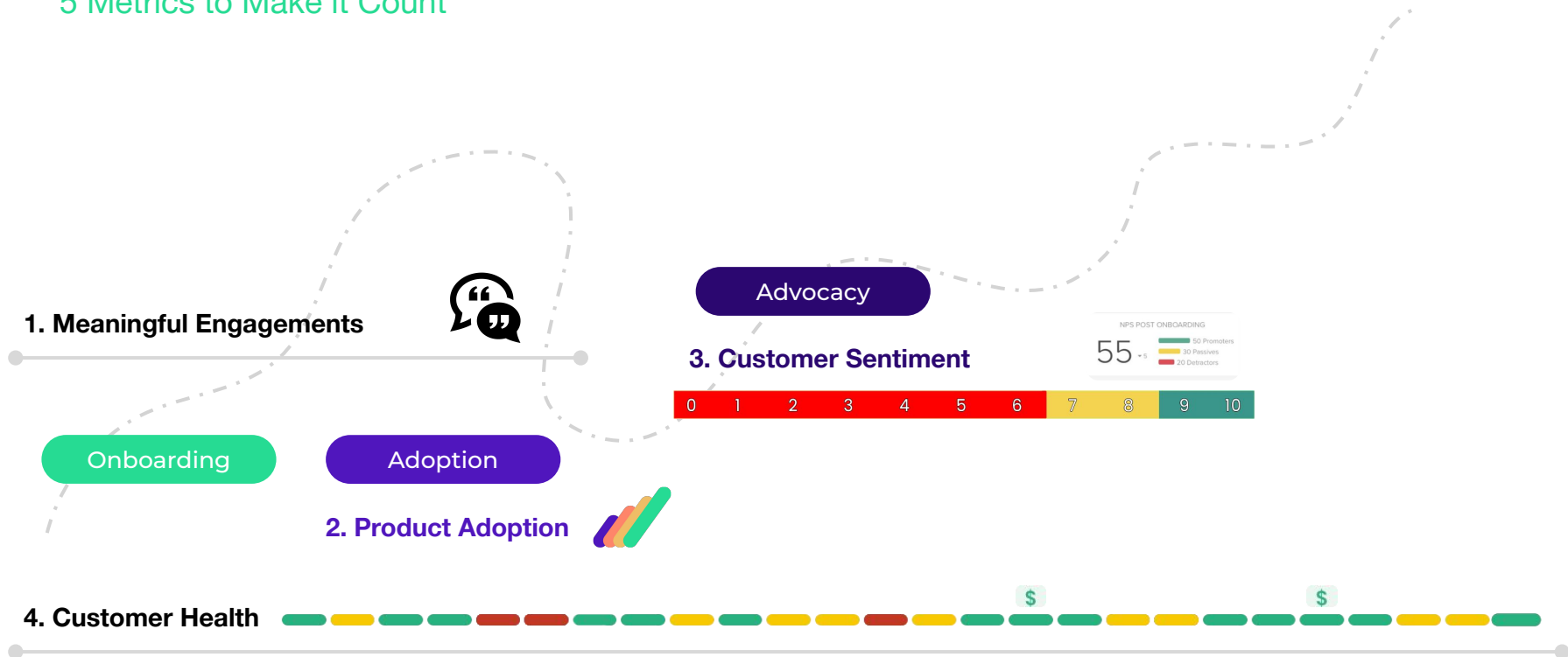
Engaged with G2 Button - All

# Network of Metrics



# Metrics along Customer Journey

5 Metrics to Make it Count



# Multi-Dimensional Health Score

4

per Account

→ Health Rank



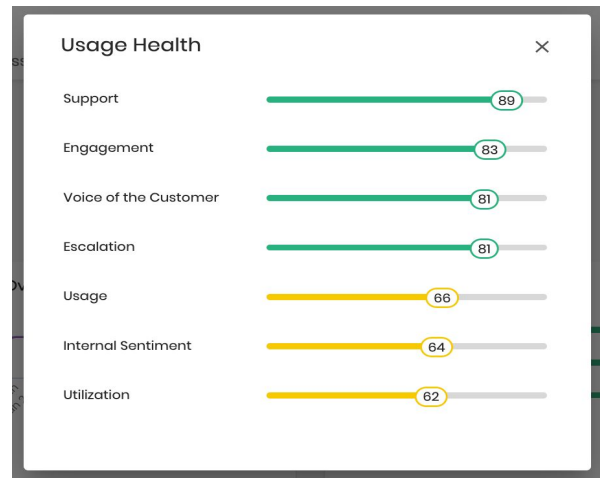
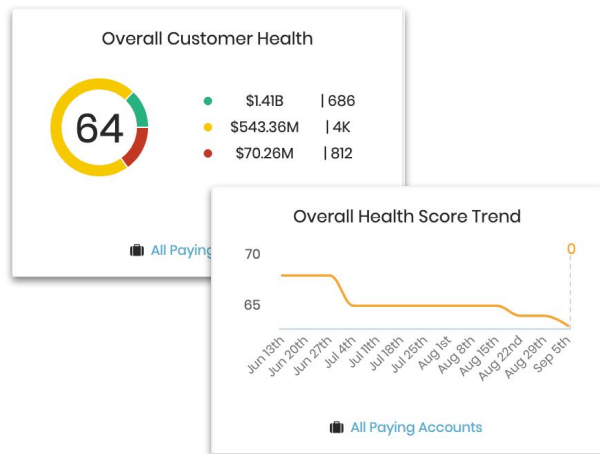
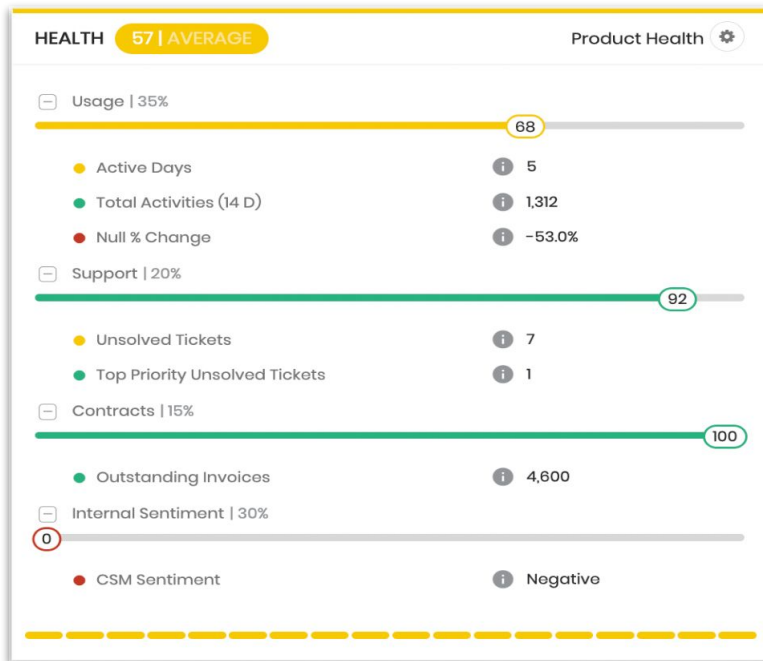
→ Health Score

per Dimension

→ Health Rank



→ Health Score



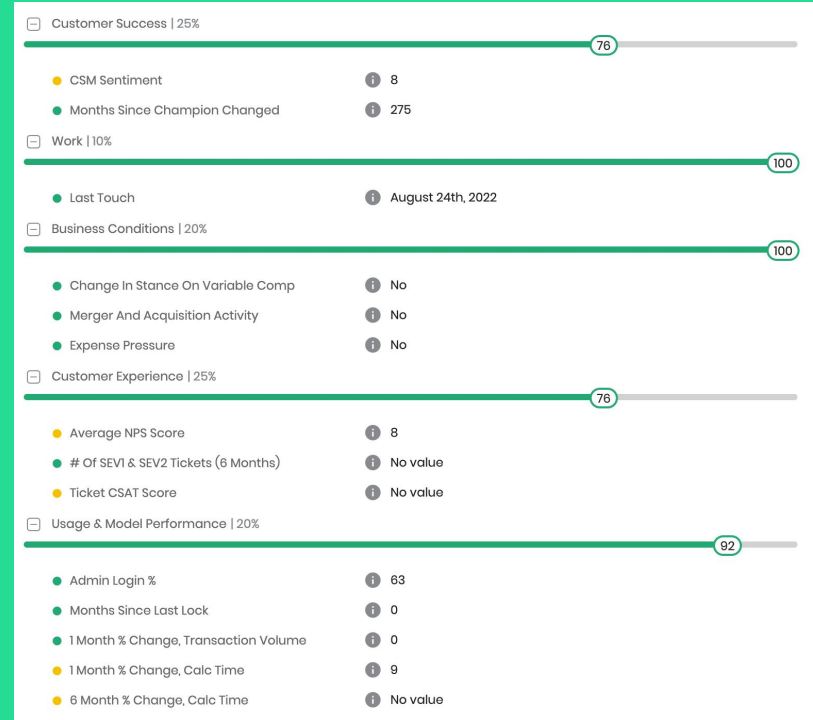
# Customer Health Score

Dimension	Metric group	Metric	SNOWFLAKE Metric	Definition
Predictor of Churn	Business Conditions	Change in champion	ACCOUNT - CHANGE IN CHAMPION	
Predictor of Churn	Business Conditions	Change in stance on variable comp	ACCOUNT - CHANGE IN STANCE	Yes/No; If Yes, capture comment with details
Predictor of Churn	Business Conditions	Expense pressure/budget cuts	ACCOUNT - CHANGE IN EXPENSE PRESSURE	Yes/No; If Yes, capture comment with details; None -> Some -> Severe
Predictor of Churn	Business Conditions	M&A activity	ACCOUNT - M&A ACTIVITY	Yes/No; If Yes, capture comment with details
Predictor of Churn	Calc time performance	Performance vs. expectation		% = (expectation - actual)/expectation
Predictor of Churn	Change in calculation time	Calc time change % 1M, 6M	ICM - MODELS - CHANGE IN AVG PROD FULL CALC 1M, ICM - MODELS - CHANGE IN AVG PROD FULL CALC 6M	Month over month change in calc time
Predictor of Churn	Change in calculation time	Change in # full model calculations Month over Month %	ICM - MODEL - CHANGE IN FULL CALCS MOM	Change in # calculations in production instance from prior production run
Predictor of Churn	Change in calculation time	Change in Transaction volume	ICM - DATA VOLUME - CHANGE MOM	Change in # transactions in production instance from prior production run
Predictor of Churn	Change in calculation time	Gb's processed per hour 1M, 6M	ICM - MODELS - CHANGE IN PROD CALC SPEED 1M, ICM - MODELS - CHANGE IN PROD CALC SPEED 6M	Month over month change in model size/max calc time
Predictor of Churn	Change in calculation time	Time since last lock	ICM - MODELS - CALENDARS PROD OPEN MONTHS	# Months since last locking; Current month - last locked month (ICM related)
Predictor of Churn	Contract	Contract renewal timing	ACCOUNT - CONTRACT RENEWAL TIMING	Derived value, represent as "xx days until renewal"
Predictor of Churn	Contract	Past contract renewal	ACCOUNT - PAST CONTRACT RENEWAL	Derived value, represent as "xx days to complete renewal"
Predictor of Churn	Implementation/Product sa	Implementation experience		0-10 Would you recommend partner + comments on why

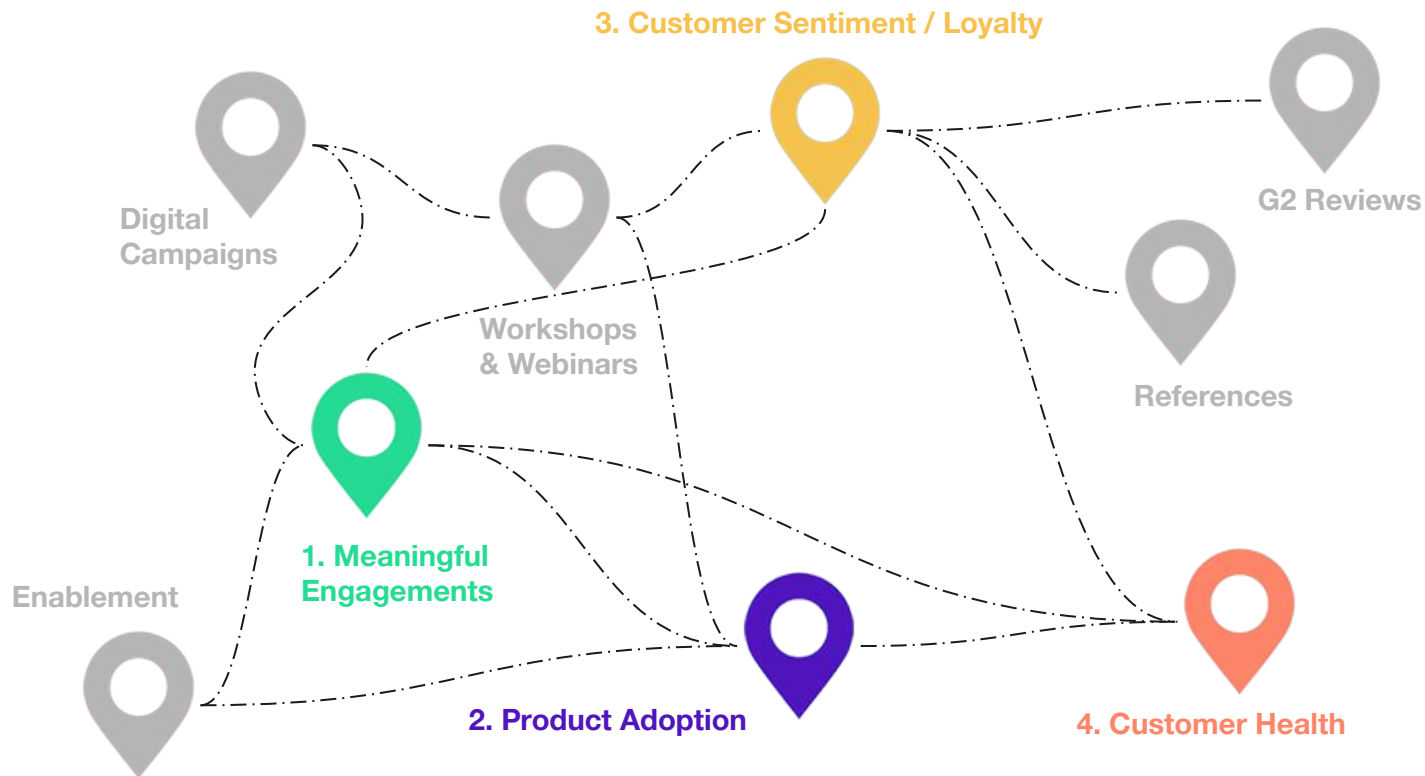
Dimension	Metric group	METRIC ID	Min	Max	Target Text	Points
Predictor of Churn	Calculation time	ICM - MODELS - CHANGE IN AVG PROD FULL CALC 6M	51	76		1.2
Predictor of Churn	Calculation time	ICM - MODELS - CHANGE IN AVG PROD FULL CALC 6M	76	100		1.6
Predictor of Churn	Calculation time	ICM - MODELS - CHANGE IN AVG PROD FULL CALC 6M	100	999999		2.0
Predictor of Churn	Calculation time	ICM - MODELS - CHANGE IN AVG PROD FULL CALC 6M				0
Predictor of Churn	Calculation time	ICM - MODELS - CHANGE IN AVG PROD FULL CALC 6M				
Predictor of Churn	Calculation time	ICM - MODEL - CHANGE IN FULL CALCS MOM	-100	-50		.1
Predictor of Churn	Calculation time	ICM - MODEL - CHANGE IN FULL CALCS MOM	-50	-25		.2
Predictor of Churn	Calculation time	ICM - MODEL - CHANGE IN FULL CALCS MOM	-25	0		.3
Predictor of Churn	Calculation time	ICM - MODEL - CHANGE IN FULL CALCS MOM	0	26		.4
Predictor of Churn	Calculation time	ICM - MODEL - CHANGE IN FULL CALCS MOM	26	51		.5
Predictor of Churn	Calculation time	ICM - MODEL - CHANGE IN FULL CALCS MOM	51	76		.6
Predictor of Churn	Calculation time	ICM - MODEL - CHANGE IN FULL CALCS MOM	76	100		.8
Predictor of Churn	Calculation time	ICM - MODEL - CHANGE IN FULL CALCS MOM	100	999999		1.0
Predictor of Churn	Calculation time	ICM - MODEL - CHANGE IN FULL CALCS MOM				0
Predictor of Churn	Calculation time	ICM - MODEL - CHANGE IN FULL CALCS MOM				
Predictor of Churn	Calculation time	ICM - DATA VOLUME - CHANGE MOM	-100	-50		.1
Predictor of Churn	Calculation time	ICM - DATA VOLUME - CHANGE MOM	-50	-25		.2
Predictor of Churn	Calculation time	ICM - DATA VOLUME - CHANGE MOM	-25	0		.3
Predictor of Churn	Calculation time	ICM - DATA VOLUME - CHANGE MOM	0	26		.4
Predictor of Churn	Calculation time	ICM - DATA VOLUME - CHANGE MOM	26	51		.5
Predictor of Churn	Calculation time	ICM - DATA VOLUME - CHANGE MOM	51	76		.6
Predictor of Churn	Calculation time	ICM - DATA VOLUME - CHANGE MOM	76	100		.8
Predictor of Churn	Calculation time	ICM - DATA VOLUME - CHANGE MOM	100	999999		1.0
Predictor of Churn	Calculation time	ICM - DATA VOLUME - CHANGE MOM				0
Predictor of Churn	Calculation time	ICM - MODELS - CHANGE IN PROD CALC SPEED 1M	-100	-50		.1
Predictor of Churn	Calculation time	ICM - MODELS - CHANGE IN PROD CALC SPEED 1M	-50	-25		.2
Predictor of Churn	Calculation time	ICM - MODELS - CHANGE IN PROD CALC SPEED 1M	-25	0		.3
Predictor of Churn	Calculation time	ICM - MODELS - CHANGE IN PROD CALC SPEED 1M	0	76		.4

# A visual and actionable customer score

Complex scoring that is extremely intuitive with Totango's interface. CSMs are notified immediately about churn predictors and assigned repeatable tasks with Varicent best practices.

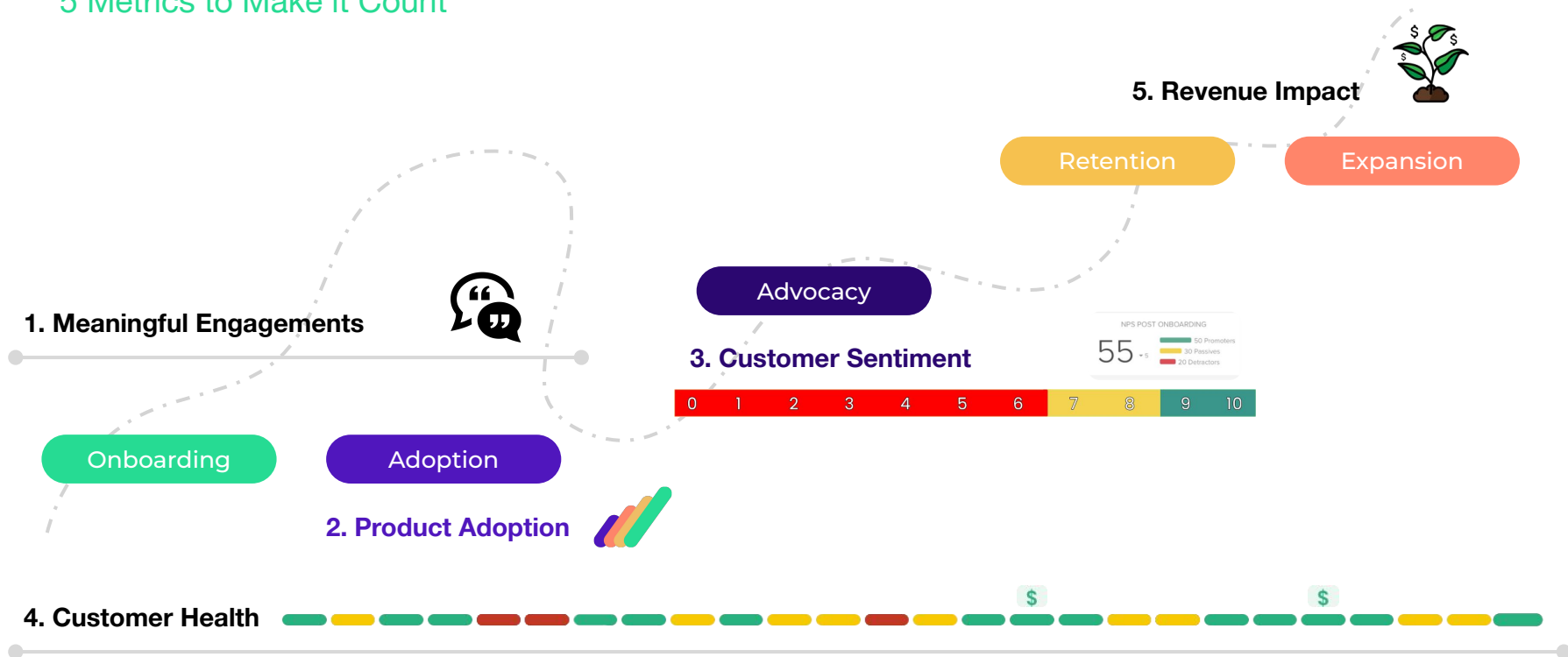


# Network of Metrics



# Metrics along Customer Journey

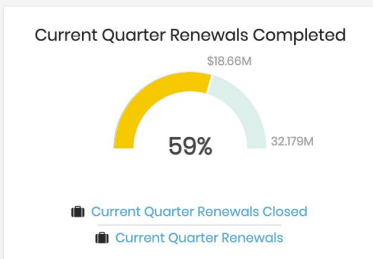
5 Metrics to Make it Count





# 5

## Achieve 98% Renewal

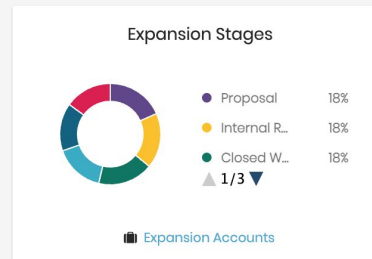
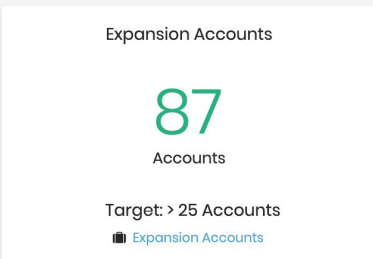


- Internal Review
- Customer Checkpoint
- Quote & Pricing
- Negotiation
- Closed Won
- Closed Lost

## Renewal Lifecycle Stage

## Renewals & Expansions

## Execute on Expansion Opportunities



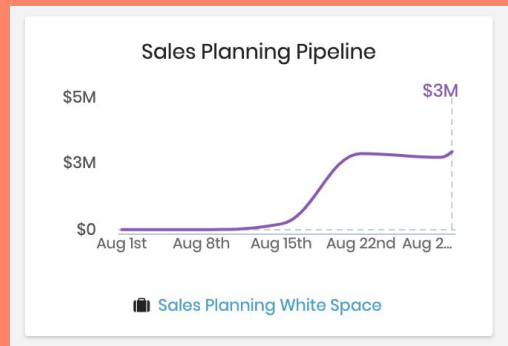
- Internal Review
- Client Strategy
- Client Meeting
- Proposal
- Closed Won
- Closed Lost
- Unqualified Opportunity

## Expansion Opportunity Lifecycle Stage

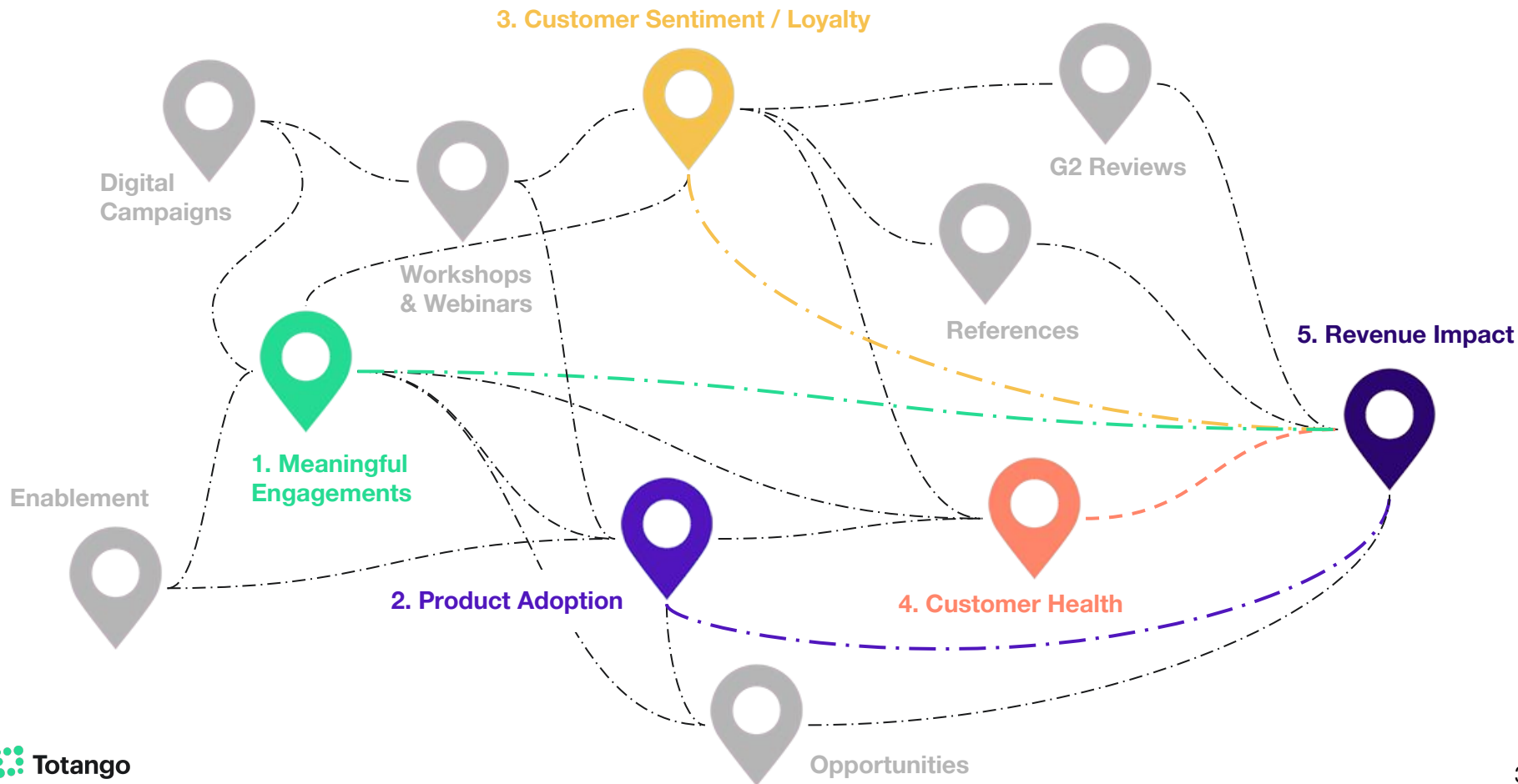
# Exposing Expansion Opportunities

With the Salesforce integration, we are able to assign a Journey attribute to the customer based on related Opportunities, and then campaign to customers based on the sales cycle.

Name	↑	TQP Interest	TQP Opportunity Value
Account 1		Opportunity Won	\$20,010.00
Account 2		No Interest	-
Account 3		Open Opportunity - Qualifying	\$50,000.00
Account 4		Strong Interest, Ready for RSM	-
Account 5		Slight Interest, Not Ready for RSM	-



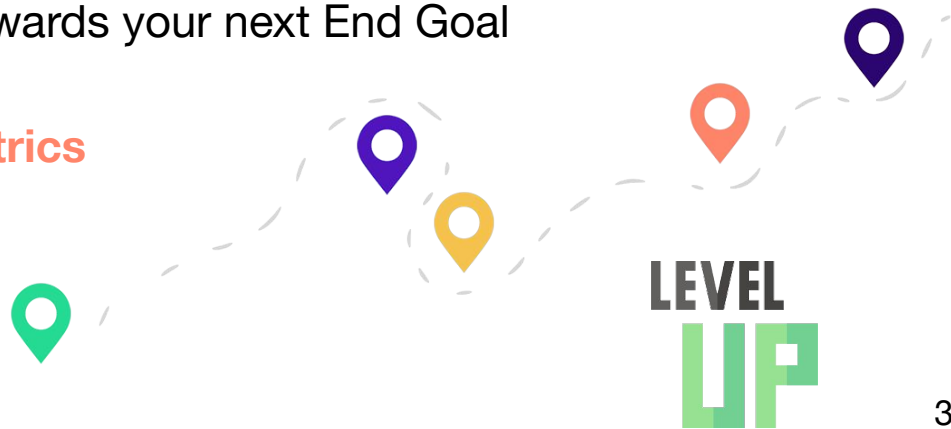
# Network of Metrics



# Key Takeaways

Exposing metric opportunities

- Focus on these 5 Metrics to build out your Journeys & SuccessBLOCs
- Look for opportunities for where you can take your Customer Success metrics to drive your business outcomes
- A metric is just a Starting Point towards your next End Goal
  - They're all Interconnected
  - & part of the **Network of Metrics**

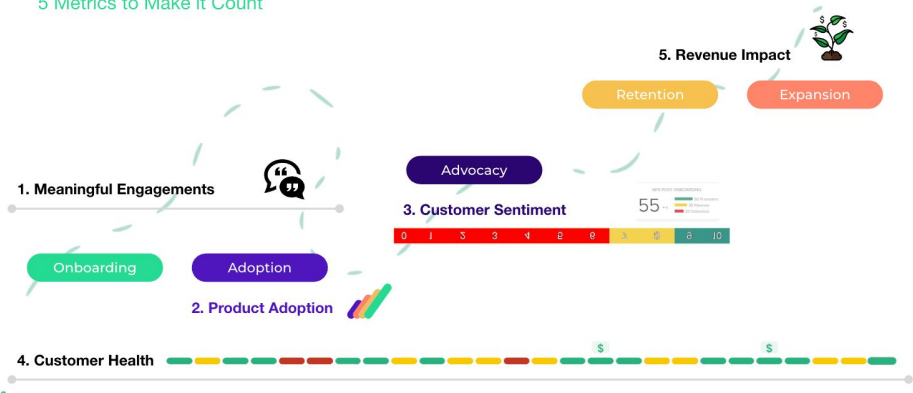


# Metrics that Matter

Exposing metric opportunities

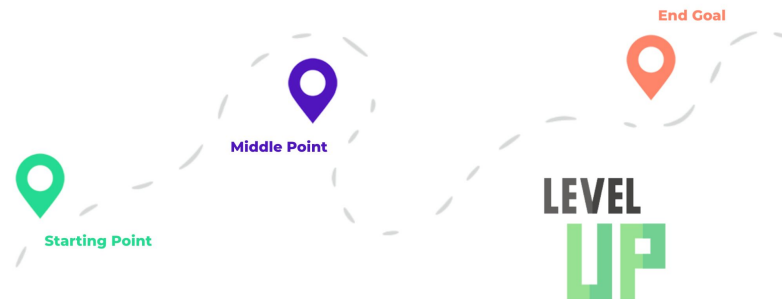
## Metrics along Customer Journey

5 Metrics to Make it Count

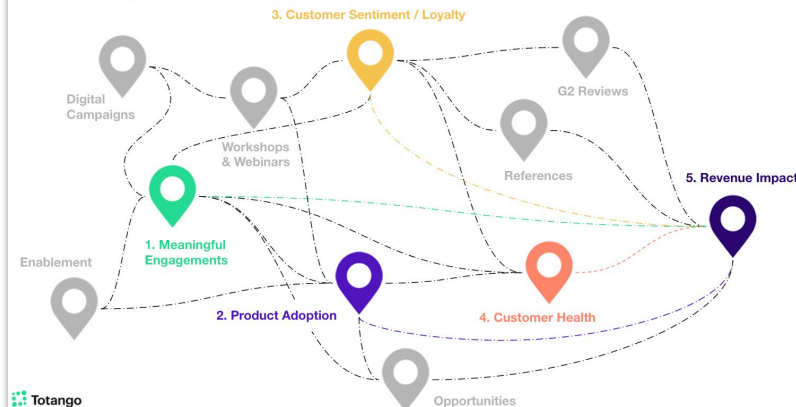


## Metrics: Part of a Journey

Taking Metrics to the Next Level



## Network of Metrics



# Thank You

**Ella Eng**

Customer Success Director,  
Enterprise Team Lead  
Totango

**Rachel Timman**

Sr. Strategic Program Manager  
Varicent

