

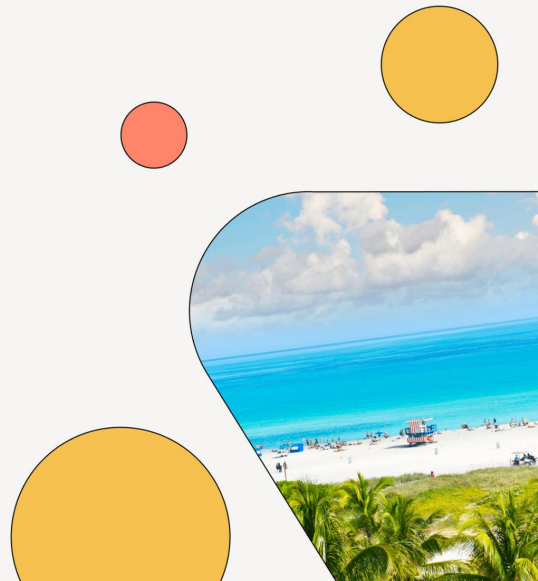
# Why Digital-Touch Leads to Extremely Sticky Journeys

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# What we'll cover

1. Why digital touch for Customer Success?
2. When should you think about a digital engagement model?
3. How to implement a data-driven digital engagement model



# Why does digital engagement matter?

# Defining digital-touch Customer Success

- Delivered through different modes of technology
- Delivered at scale
- Executed with a high customer to CS ratio
- Incorporates self-service resources and tools

**81% of customers  
will attempt to take  
care of an issue  
themselves first.**

*Harvard Business Review, 2017*



# When to consider a digital-touch model

# When to consider a digital-touch model

Digital experiences can be leveraged in any Customer Success engagement strategy

- > How many customers do you have?
- > What does your product cost, and what is your labor cost model for Customer Success?
- > How many different types of users and use cases exist for your product?
- > What is the buying process?



# How to implement a digital-touch model

# How would you best describe the state of your Customer Success team?

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1. Building stage or introduced in the last 1-2 years
2. Around for a while but undergoing a rehaul
3. Mature and maintaining steady state
4. Adding capabilities and in growth phase

- 1. Take a Data-Drive Approach**
- 2. Map the Customer Journey**
- 3. Build the Team**

# Took a Data-Driven Approach

- Strove for progress, not perfection
- Brought in IT early
- Focused on the customer journey

# Mapped the Customer Journey

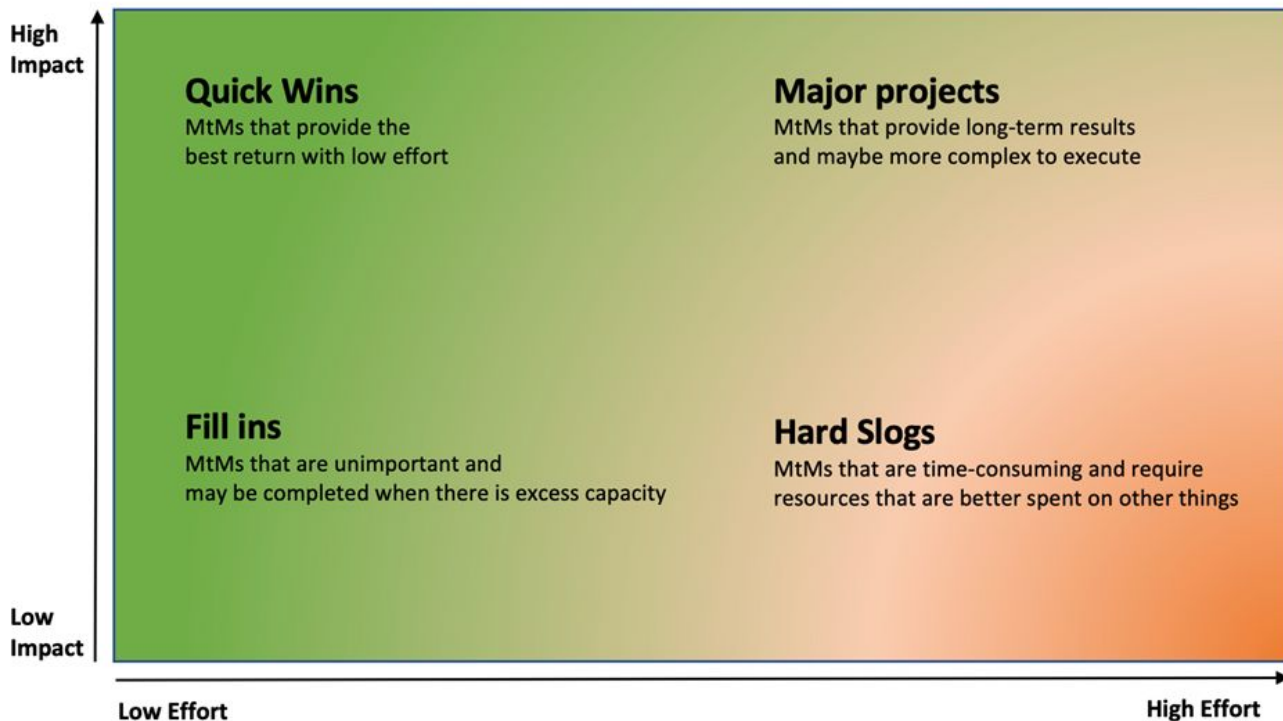
*It was a journey...*

- Established our **cross-functional stakeholders** to brainstorm our journeys and personas
- Prioritized the **moments that matter**
- Established our **core capabilities** within the journey
- Implemented internal tools and systems to **operationalize our journeys**

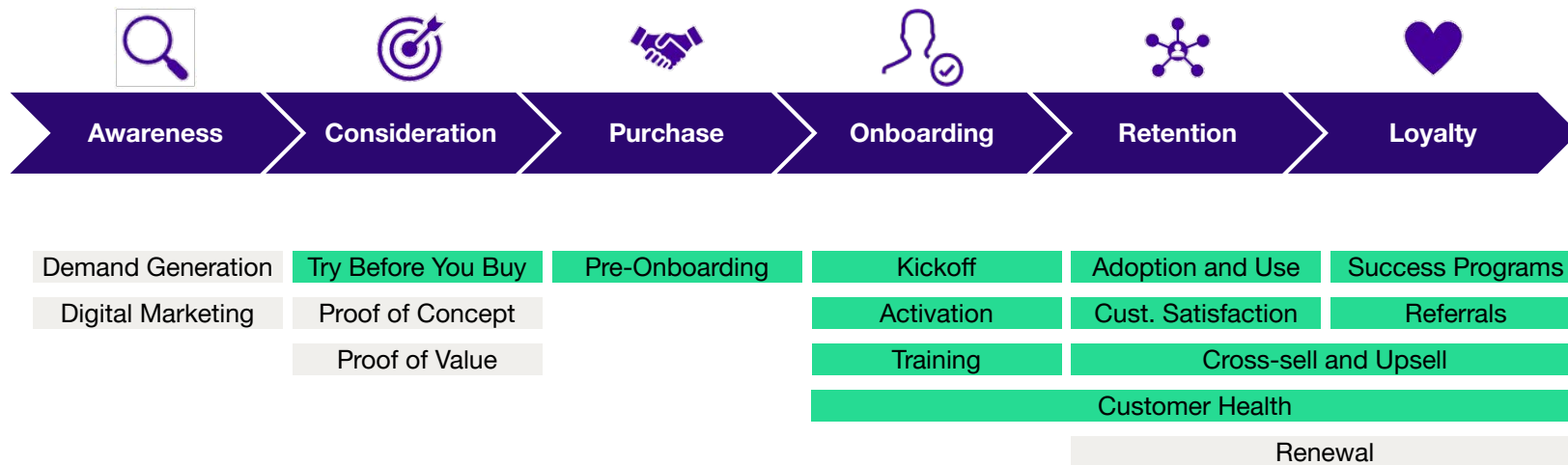
# Established Stakeholders

<b>Responsible (R):</b>	Performs the task to completion	Customer Success, IT, Sales Ops, Project Management
<b>Accountable (A):</b>	May delegate the task but is accountable for its completion	CS Leads and Core Team
<b>Consulted (C):</b>	Serve as advisors for portions of the task	Product, Customer Experience, Marketing, Account Team
<b>Informed (I):</b>	Informed on an as-needed basis when results of each task and/or project affects them	Executive Sponsor, Broader Teams

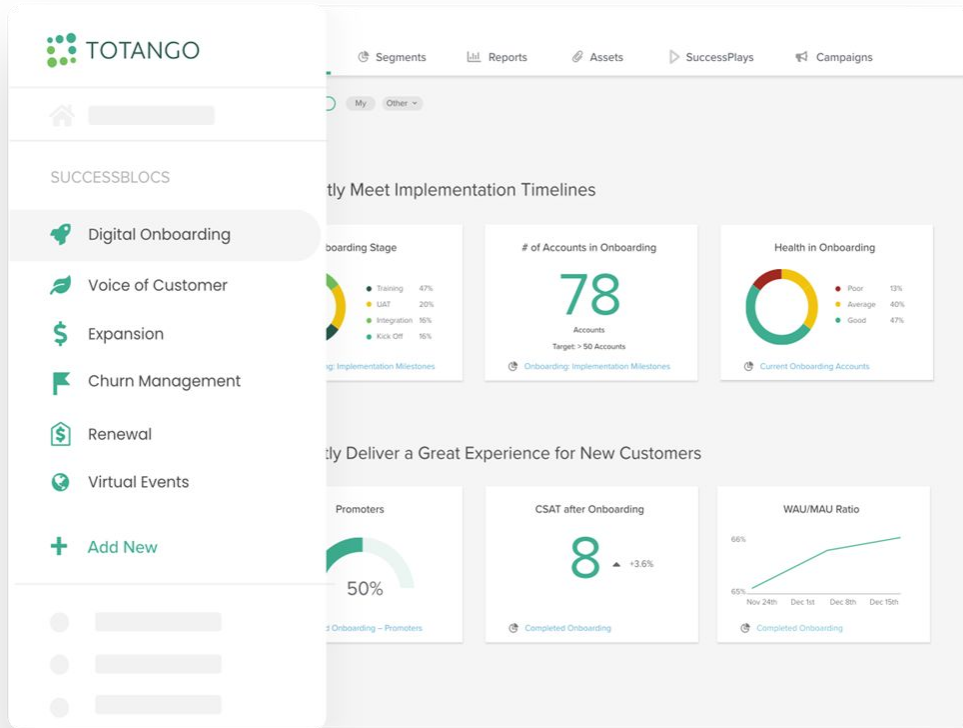
# Defined the Moments that Matter



# Prioritized our Capabilities



# Operationalized our Journey



# Built the Team

- Made key hires
- Establish the engagement models
- Explore staffing ratios and monetization opportunities

# Implemented our Learnings

*Extreme Customer Success  
Product Launch Checklist*

- Information Gathering
- Define Customer Journeys
- Map Journey to Playbooks and Totango Success Plays
- Define Data & Content Needs
- UAT & Go Live
- Reporting

# Key takeaways

- > **Consider adding digital-touch to your customer success approach.** It does not have to be all-or-nothing and complements other customer success engagements while bringing scale and stickiness.
- > **Define your customer journey, then start small.** Use a data-driven approach to choose phases of your customer journey, products, or customer segments where a digital-touch model can be impactful.
- > **Build your team and establish a plan for success.** Begin with the end in mind when you build automation and content.

# Thank You

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