

AJ (Adam Joseph): Welcome Ben, can you tell us more about GlobalWebIndex (GWI)?

BH (Ben Heavens): Sure, we're an audience profiling data company and we cover the world's largest study on the “*connected consumer*” - essentially anybody that is connected to the internet. We enable our customers to profile audiences of their choosing and to find out exactly what they're doing and how they're spending their time. We enable marketers but also brands, agencies and a whole plethora of other companies and verticals to better market their products and understand their audience.

AJ: I'm sure that Customer Success plays an important role in helping your customers get value but how did it start at GWI?

BH: GWI has gone through a lot of transformation since the beginning and I kicked off Customer Success around 18 months ago. We've been going now for just under nine years and as we grew as a business and as we developed our offerings, it made sense for Customer Success to be a part of that. When GWI first started we were essentially just a data company – there was no platform or interface for our customers to engage with. Around 2014 we launched our own platform so that our customers could manipulate the data and that made sense for our clients; Customer Success has come along and is off the back of that.

AJ: What is the structure of your Customer Success team?

BH: GWI currently have two main offices which are in London and in New York; my team spans both of those locations. There are seven people in London (myself included) and also an additional four in New York, however, we are growing rapidly and I've got very expansive headcount to fill this year. We have grown quickly; at the start of last year there were only three people in the team and we finished in double figures at the end of 2017. The team is ramping up very aggressively but as a business we have always ambitiously grown our teams and our revenue year-on-year and that is part of our very rapid growth.

There are three key parts to my group with the biggest being our enterprise Customer Success team who look after our enterprise logos. We also recently launched a freemium proposition to our product which essentially democratizes our data and give anybody free access. That takes a very different scaled approach to Customer Success which focuses on the “one to many” engagement model and that is a smaller team to drive that engagement across those freemium users to make sure that they are just as successful as our enterprise customers.

I also head up our Support Team which is reactive; anytime anyone of our customers wants to send in questions or needs help they can use our live chat, email (or other forms of communication) and our team will help.

AJ: How has your Customer Success processes evolved since you first joined GWI?

BH: I came in with a lot of plans of what I wanted to do however I don't think anyone really goes into a business and sees all of their initial thoughts come to fruition because you learn more about the business. I think what's interesting about Customer Success at GWI compared to other companies that I've worked for is that typically Customer Success is introduced a little bit earlier in the transformation of the business. The difference is that there is obviously a lot of different teams already have their own way of working for quite a while and you have to introduce new ways of working and ensure that we are working effectively with other teams while helping each other achieve your objectives.

AJ: Especially looking at the way that you support your freemium customers, how do you deliver Customer Success at scale?

BH: So it's a great question because we're very early in our freemium journey; so we only officially launched our freemium solution about a month ago (February). **The best piece of advice I would give to anybody that's looking to implement something similar is that it requires a lot of testing and evolving your approach.** Obviously you'll have a lot of assumptions about the people that you'll be engaging with - especially around what they're looking to get from your product (or in this case from our data). We segment our customers using "personas" that are based on different roles which will have varying levels of needs and requirements.

We build our messaging and engagement tactics around those personas which you would assume makes a lot of sense but what we often find is that it's not driving the ongoing adoption that we would expect. **You have to be "on the pulse" the whole time, testing your approach and evolving your messaging. A massive other part of this process is continually getting feedback from your users and trying to capture information from them at various stages to make sure that the messaging that we're putting out is right for them and whether we helped them achieve their goals or not.**

I think quite often businesses are quite scared to ask that of their customers. You need to actually get real constructive criticism to find out whether the messaging engaged, did it add value, and did it help them understand the value of our proposition. You might not want to ask those questions as directly as that but getting a "temperature check" with your user base is absolutely critical to getting this right. In addition, reviewing the data to see the levels of engagement as a result of these campaigns is just as critical in my view.

AJ: Customer Success at GWI is not solely focused on churn mitigation but also used as a growth engine for this business. Can you tell us more about the aims of Customer Success at GWI?

BH: The inception of Customer Success at GWI wasn't around churn mitigation or renewals because historically we've had market leading retention rates (especially across our enterprise customer base) but based on growth.

We offer product trials however we were getting low trial conversion rates. We were very eager for our prospects to test our product, get their feedback and then have a conversation about setting them up on a longer-term deal. What we didn't have the bandwidth for 18 months ago was for our Sales and Account Management teams to really focus on shortening client time-to-value and driving the engagement throughout that trial.

Where Customer Success at GWI has been really successful in trial management and conversion has been shortening that time-to-value and really understanding the use cases. On occasions, it can be a very large trial for a customer but the users have different personas, agendas and use cases. Although engaging with your stakeholders is important sometimes you can't get enough information from that initial conversation. Where Customer Success plays a big part in this process is speaking to users, understand the use cases, delivering value-based training/education to really drive the value or reach that "penny drop" moment with that customer really early into that trial. This way they're going to go on and continue to use that product and see the value in it and continue getting value from our data throughout the trial period.

If you break Customer Success down into its simplest form which can apply at any business, it is understanding what the customer is looking for. Just literally trying to understand that and then using your product or service to essentially help them achieve their goals. A lot of Customer Success teams are borne out of the need for change mitigation or retention. **However, you should be looking to implement Customer Success regardless of your retention or your churn requirements because you should be helping your customers to see the value of your solution and then retention and growth will look after itself.**

If you take a historical Account Management or Sales approach, trying to capture that whole "big picture" about all the different pockets of that organisation that they can see benefit from your diverse product or data-set, is a big challenge to address. Having a Customer Success team to speak to all of those users and helping drive that strategy for that account going forward will ultimately lead to growth and retention.

AJ: Is it difficult to juggle the competing priorities between supporting your trial users and your enterprise customer base?

BH: I would definitely peg 2017 as a learning year for us in Customer Success. One of the key fundamental learnings I took away was really that that difficulty in prioritisation. You picked a really good topic here because Customer Success Managers typically have a lot on their plate regardless and prioritisation can be a real challenge. Adding trial management is obviously a competing priority with what a CSM would normally look at in a typical organisation.

Although we saw a lot of success last year, from a bandwidth perspective, it didn't make a lot of sense. However, as you know we're rapidly expanding the team this year and what I'm looking to do is essentially split those rolls out. We will have a sub-team of Implementation Managers to manage the trials (one of which are actually hiring for right now in the U.K.) and then essentially enabling the team of CSMs (which are also growing) to continue to focus all of their time and energy into those existing clients for their growth.