



CUSTOMER SUCCESS MANAGEMENT — FOR LEADERS —

The Boardroom Collection



EXPERT ADVICE FROM INDUSTRY PIONEERS





WELCOME

The enterprise software world is rapidly changing, as businesses now increasingly want cloud-based Software-as-a-Service solutions. Unlike the old on-premise software world, SaaS is extremely compelling because it offers lower potential costs, easier scalability and integration, and, most importantly, reduced time to value.



SaaS and the “Subscription Economy” represent one of the greatest opportunities in the software industry, but that golden opportunity also comes with a series of new challenges. These challenges include the difficulty of retaining customers, and ensuring users are fully engaged with the product while simultaneously achieving tangible business results.

Because of this, a new profession has emerged to tackle this challenge, best known as Customer Success. By now, many of you already know its importance, but the full value may not be completely clear. This eBook will convey why Customer Success is a business imperative for any SaaS organization, it will assist you in being able to create and implement a robust Customer Success strategy for your business, and it will arm you with the proper tools to effectively drive Customer Success throughout your organization.

The authors in this eBook include a collection of SaaS experts, Customer Success pioneers, venture capitalists, and industry leaders who are reshaping the enterprise software world. These authors are drawing from their experiences at world-class organizations like MobileIron, Norwest Venture Partners, Oracle, Yammer, Zuora, and more. This eBook will deliver a collection of impactful tips, best practices and actionable information that will help you create the framework for your own Customer Success strategy.

This eBook will assist you in being able to create and implement a robust Customer Success strategy for your business, and it will arm you with the proper tools to effectively drive Customer Success throughout your organization.

Wishing you much customer success,

Co-Founder & CEO, Bluenose

BLUENOSE

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TABLE OF CONTENTS

-The Boardroom Collection-



The Best Kept Secret When Transitioning to SaaS / 3



The Cloud Customer Journey / 6



When to Invest In Customer Success / 13



The Customer Success Mindset / 19



Building A Customer Success Focused Company / 25



The Network Effect and Customer Success / 33



Turning New Customers Into Advocates / 38



Owning The Post Sales Experience / 42



The SaaS Company Board Pack / 47



Conclusion / 53



THE BEST KEPT SECRET WHEN TRANSITIONING TO SAAS

“I wish I had done this last year,” I told my Board of Directors just 90 days into launching our first Customer Success department. We were transforming our business from perpetual licenses and on-premise delivery to a growing SaaS business. We were now being evaluated on our ability to grow the recurring revenue stream, and we built a sales model that compensated for new customers.



Jason Stern

President & CEO

You see, churn was not a big issue. In fact, we typically maintained north of 95% of recurring revenue year to year. However, a deeper look into the data started to show early indicators of customer dissatisfaction. Further, there was a beginning of a trend, which if left unaddressed, would destroy the company’s growth.

The goal was to turn our customers into our biggest advocates. The team’s target was to “talk to every customer” in the first 3 months.



I launched our Customer Success department on the first day of the new fiscal year, staffed with a mix of people from within the organization ranging from Sales, Professional Services and Training. A survey and Net Promoter Score was all I expected. However, what I got was so much more.

Towards the end of month three, my phone rang. It was the business sponsor from a customer who happens to be a \$10 billion dollar global company. They were using our

solution in their U.S. department and had fewer than 100 users. Based on annual contract value our system flagged them as a small customer. However, the Customer Success team saw them as a strategic customer and did a little digging as to why they weren't using us more. They uncovered that they were indeed happy with the solution and a couple of small edits would allow them to grow their usage internationally.

The customer feedback was clear: working with Customer Success made all the difference in their advocating internally.

By the end of the quarter that customer had increased their user licenses to 250 and were moving to over 1000 by end of the year. The customer feedback was clear: working with Customer Success made all the difference in their advocating internally. I was even thanked for adding the resources.

***“Why didn't I do it a year earlier?”
is all I could think***

We had successfully changed the business model from a perpetual license company to subscription. We had successfully transitioned the products to the cloud. But it took a Customer Success team for us to become a customer-centric culture like a great software as a SERVICE dictates. This was the “Ah Ha” moment. We couldn't have realized it without a dedicated Customer Success department.

I still say, “I wish I had done it earlier.”

***“I was even thanked
for adding resources.”***



THE BEST KEPT SECRET WHEN TRANSITIONING TO SAAS

Realize that as your business model changes, so should your service offerings. The transition from perpetual licenses and on-premises delivery to SaaS, requires a dedicated Customer Success team.



Customer advocacy will play a major role in your company's bottom line.

Conversely, customer dissatisfaction will not be tolerated when your business model changes to SaaS because customers are now empowered and can leave as they see fit.





THE CLOUD CUSTOMER JOURNEY

As the enterprise software business continues the rapid transition to the Cloud, we are witnessing the traditional enterprise software business models of the last 40 years become increasingly irrelevant. Some models are being shattered entirely, with new ones rising to take their place. The transition to the cloud is due in large part to the tremendous customer demand for this class of applications, platform and infrastructure.



Omid Razavi

*Former Vice President of Services
Sales & Strategy at SuccessFactors
(an SAP company)*

***The Cloud Customer Journey requires
a new approach and business model to
truly satisfy customers.***

Much has been said about the change from the (pay upfront) perpetual licensing model to the subscription-based business model. This shift, or new era, is named by many as the “Subscription Economy.” While it is true that renewal and non-renewal (churn) are part of the subscription vernacular, the reasons behind those decisions are what tell the whole story. These reasons include: technology consumption, user adoption and business value realization. Because of this, a better characterization of the current era is the “Consumption Economy.”

To truly appreciate what is different about the Cloud, it is necessary to walk through the Cloud Customer Journey and contrast it to the legacy journeys of traditional models.

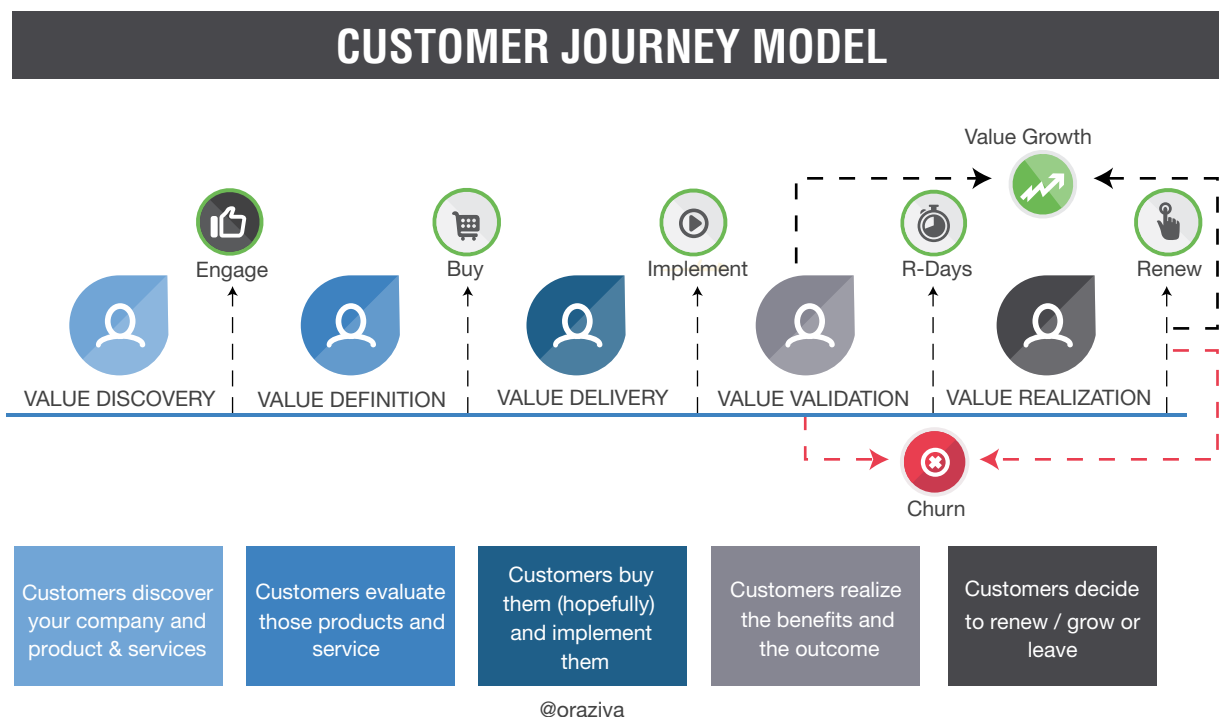
The Cloud Customer Journey is about an outside-in view of:

- ☁ How customers discover your company.
- ☁ How customers discover your products and services.
- ☁ How your company/products/services are evaluated to meet the customer's business objectives.
- ☁ How the technology (and the benefits) are delivered to the customer.
- ☁ How customers realize the benefits and business outcomes.
- ☁ How those benefits and outcomes are validated between you and your customers.

If you're doing a good job, this last part results in renewal, growth and advocacy. If you're not, then this is where the customer leaves you.

Cloud Customer Journey in the Consumption Economy

The Cloud Customer Journey is amazingly simple when charted from the customer viewpoint and not from the vendor's internal organizations and siloed operations. As we go through each of the customer journey stages, we will also call out the role of Customer Success, which did not have an equivalent in the previous model.



Value Discovery

In the old world, this phase of the customer journey was about connecting with customers for vendor and product information. In the modern world, such information is readily available through a variety of sources.



By one survey 62% of the customer buying process is complete before they engage with a vendor.

Keep in mind, this also includes the customer forming an opinion about the vendor before they've ever filled out a form or requested a demo.

This is when customers discover your organization, your products and services. Your marketing and lead-generation teams shine during this phase, as they get your new customers in the door. Remember, customers can already know a lot about you, so focus on how you can solve their real business needs when you engage them.

Customer Success doesn't play a direct role in the value discovery phase. The indirect role in the new customer acquisition is in sharing customer experiences and their success stories with new customers, or turning your existing customers into your marketing advocates.

Value Definition

During the value definition phase, the customer, with help from your Sales team and/or through self-service programs, evaluates your products and services for a solution that will meet their needs. This is where it is important to have trained Sales professionals, proper sales processes, tools and information to help the customer make the right purchase decision.

Many businesses don't have Customer Success interact with clients until they're officially customers. Of course, if you have a try-before-buy or freemium offering, then Customer Success is likely involved early on. Savvy customers want to know about your post-sales success programs, so you may want to include introductions to your Customer Success as a point of competitive advantage in this phase.

Savvy customers want to know about your post-sales success programs, so you may want to include introductions to your CS team early in the process.

Value Delivery

The value delivery phase really shows the difference between the old world and the new Cloud Customer Journey. In the past, this was the implementation phase handled by your professional services or systems integration partners, and it would normally take months or even years to deploy.

Aside from the fact that Cloud implementations will expectedly take weeks or at most months, it is also a more collaborative experience that will include customer participation. Please remember, value delivery is not a single-threaded activity. Parallel with implementation, the Customer Success team can often handle the onboarding and enablement. In fact, customer onboarding, which starts from day zero of customer signing contract, is so important that the "first 90 day experience" has been cited as the top factor impacting customer retention.



The 'first 90 day experience' has been cited as the top factor impacting customer retention.

If your customers have issues onboarding, the Customer Success team can detect that early and properly address those issues. A great onboarding experience can be the source of positive customer testimonials and referrals through social media and the community networks.

Value Realization

Value realization starts immediately when the customer goes live because this is the time when they expect to reap the benefits of their investment in your applications. Depending on the duration of your subscription contract, the value realization phase spans 2/3 or more of the subscription contract length. In the traditional software business model, there was the (reactive) customer support for the vendor application code, and not much more. In that model, the risk and the accountability belonged to the CIO of the customer's organization, and the vendor was responsible for supporting one of many components.

Of course, that has entirely changed now with the Cloud. Almost all of the accountability and risks lie with the application vendor, thus having just a reactive customer support will not meet customer expectations. Hence, the birth of Customer Success, which is, at a minimum, about ensuring customers realize the benefits of your solution.

CSM is not about account management, nor having the cadence of periodic calls with customers. It is about data-driven insights, dialogue and actions that will become part of your best practices.



You will need skilled resources with tools and data to have meaningful contextual engagement with customers around value realization, user adoption, technology consumption, and account expansion and growth.

Value Validation

Value validation, which may be viewed as an extension of value realization, is really a separate phase in the customer journey to validate the value of your solution for renewal, as well as for expansion and growth. As your company grows, value

validation (or renewal management) becomes an increasingly significant portion of your revenue.

Customers validate the value of your solution with the renewal. They double down their investment in your solutions and allow you to expand, upsell and cross-sell, or they will leave.

The value validation stage is actually longer than you think because customers can leave at anytime in their journey. Likewise, upsells and cross-sells can happen at anytime during the value realization. This makes the role of Customer Success Manager particularly pivotal in any Cloud organization.

Customer Success Management may include all the activities associated with customer onboarding, value realization and renewal, or you may have separate teams for onboarding, success management, and renewal management. Often times, these teams will report to a Customer Success executive.

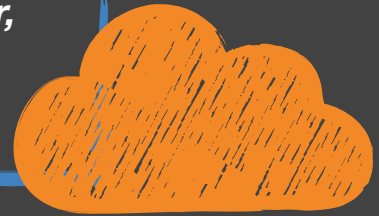
In addition to organizing Customer Success and defining its interrelationship with Sales, Marketing and Product organizations in your company, you will also want to consider Customer Success software, tools and best practices that your team will need to deliver Customer Success consistently and at a scalable pace.

As I've described, the Cloud Customer Journey requires a new approach and business model to truly satisfy customers. Chief among those new concerns is the need to have and empower a strong Customer Success team. Those who fail to adjust will soon be out of business.



THE CLOUD CUSTOMER JOURNEY

The key components of the Cloud Customer Journey are inextricably tied to value. How does your customer discover, define, realize and validate value?



In the perpetual licensing days, the customer assumed much of the risk after the deal was closed. In the SaaS world, the company assumes the 'risk' and responsibility ensuring customer happiness.

At a minimum, Customer Success is about ensuring that customers realize the benefit of your solution.





WHEN TO INVEST IN CUSTOMER SUCCESS

A CFO walks into the office of his CEO after days of analysis in preparation for an upcoming board meeting.

“I have some good news and some bad news,” the CFO said.

Figuring he should buffer the bad with the good, the CFO shares his findings.

“The good news is our new bookings rate is through the roof. We are exceeding our original target.”

“That’s fantastic,” the CEO responds, “What could possibly be the bad news?”

“We have a churn problem,” the CFO responds soberly.

The CEO thinks for a moment and responds, “Thanks for the update. I will get my top sales people right on it.”



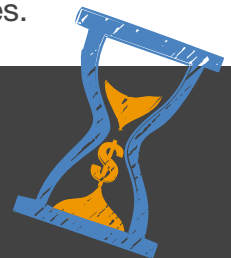
Catherine Blackmore

*Chief Customer Officer
at Bluenose Analytics, Inc.*

Why Sales Can’t Solve the Problem

Surely, the story above is a retro tale of an organization responding to a leak in the revenue bucket? Sadly, I still hear versions of this story today. In spite of the current buzz, Customer Success is a nascent department and many organizations are trying to solve the issue of churn through Services, Support, and even Sales.

Services, Support, and Sales aren’t properly suited for handling growth in user adoption, reducing churn, and adding value to the customer’s journey.



None of these departments are properly suited for handling growth in user adoption, reducing churn, and adding value to the customer’s journey. That’s why it’s vital to

invest in Customer Success early.

Services teams are focused on managing a project. Their mode of work is transactional and their measure of success is project completion. They don't stick around to address issues that happen once their work is complete.

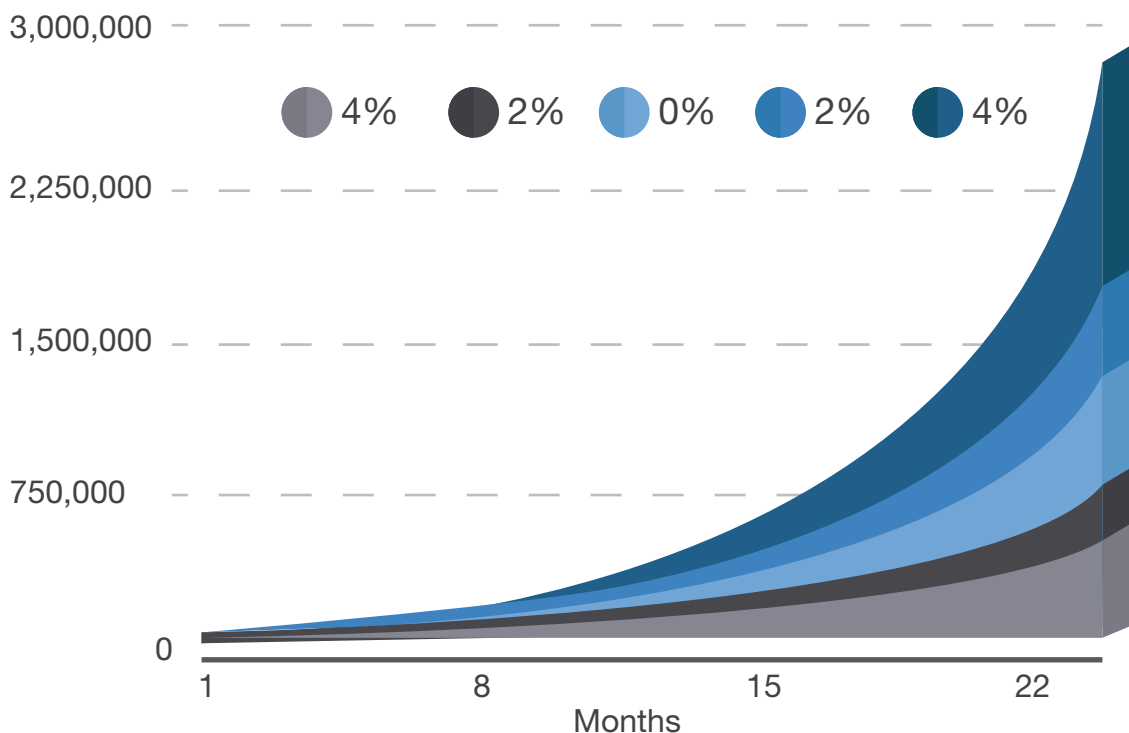
Support is focused on issue resolution. Their mode of work is break-fix and their measure of success is tickets closed within SLAs. They don't proactively engage customers outside the support queue.

So, that leaves Sales.

Sales is certainly focused on revenue, but there are three reasons why this option doesn't work.

- 1 You can't sell your way out of it.** In the early days, new booking revenue can certainly mask a churn problem. Sure, it solves your board-level optics, but this won't last long. At a certain point, your bookings will flat-line or even worse, decline. You can't bail water fast enough ... it's better to fix the leak.

CHURN'S IMPACT ON REVENUE GROWTH



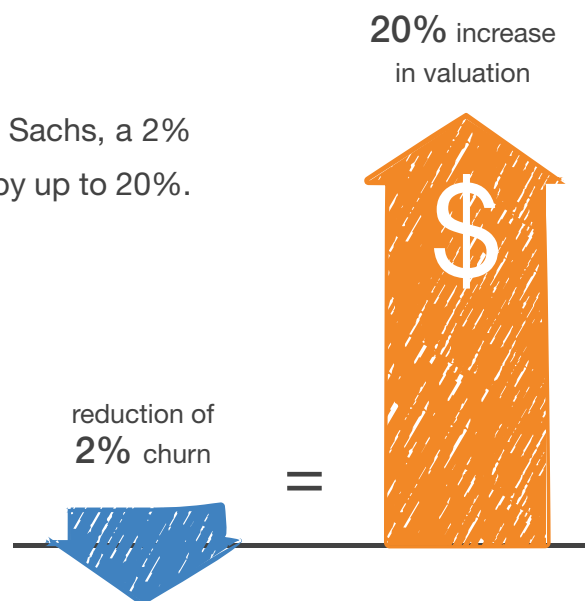
- 2 **Sales doesn't have the time.** To fix the churn issue, you need data. This means proactively analyzing usage data and talking with customers who are at risk. This information then needs to be fed back into the organization so that systemic issues are addressed and resolved. Asking the sales organization to do this work means they are compromising their new logo efforts.
- 3 **Sales may compound the issue.** It's tempting to have your sales team re-engage with an at-risk client and re-sell them on sticking around another year. But what if the root cause stems from your sales team? What if the risk reason centers on your team misrepresenting your technology to potential clients? Additional promises of features that may never exist will only make matters worse. It's a good idea to have a different team do the digging and solve the problem.

Churn has a huge impact on cash flow. The math doesn't work if you customers leave before the payback on your investment.

The Numbers Don't Lie

According to a recent report by Goldman Sachs, a 2% decrease in churn can improve valuation by up to 20%. It makes sense why.

There is plenty of analysis around the impact of churn. As I mentioned above, you have a limited window before a churn problem can start to inhibit your rate of growth.



The other nasty fact is the impact churn has on cash flow. Depending on your rate of spend to capture a new logo, the payback on that investment could be 18 months or more. The math doesn't work if your customers leave before the payback on that investment.

You also need to consider the money you are leaving on the table. A healthy customer base means you are not only recapturing acquisition spend, but you are also generating new dollars via upsell & cross-sell opportunities. There's also the network effect of a happy customers evangelizing your product to their peers.



You Needed to Invest Yesterday

In all of my previous companies, I was hired a year or two after Sales sold its first deal. Every company was starting to experience churn to one degree or another, and every company invested in Customer Success way too late.

Reversing a churn problem takes time. Typically, new Customer Success folks spend many months in fire fighter mode while Customer Success leadership analyzes and addresses root cause issues with the organization. At best, your new team of resources will swarm at-risk customers and quickly get things back on track. At worst, you uncover product issues that will take years to resolve.

Given the impact of churn, a resource dedicated to the long-term success of your customers should be in place the moment you land your first customer. No different than your investment in Sales or Marketing, this early resource has the responsibility to not only protect but also grow.

The journey to success with an early product can be a bit stormy. A dedicated resource will help you navigate the chop, keep customers on the boat... and tell others they should get on board.

But what if you don't have a churn problem? You will.

As companies grow, they lose intimacy with their customers. Swarming customer issues or maintaining close executive relationships can only scale so far. When you start to double or triple your customer count, you are going to have a problem. Accelerating your rate of growth will accelerate your rate of churn if you don't have the proper Customer Success foundation in place.

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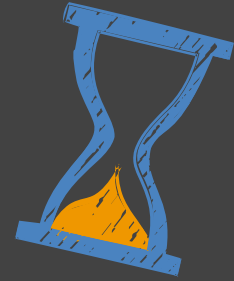
Making the Investment

For all the reasons I've outlined and more, Customer Success is uniquely suited to protect and grow revenue for SaaS businesses. The sooner you understand that, the sooner you can convince that CEO that investing early in Customer Success is a business imperative.



WHEN TO INVEST IN CUSTOMER SUCCESS

Sales cannot fix your churn problem.



Investing early in Customer Success is paramount to ensure the longevity of your company.

The time and money required to acquire a new customer is much greater than what it takes to maintain and grow relationships with current customers.





THE CUSTOMER SUCCESS MINDSET

Customer Success has gone from a buzzword to an area where all smart SaaS businesses are investing. Customer Success might be the new area of focus, but I'm here to tell you that you can't just throw some money and a few people at it and think the job is done.

Customer Success, "the department," starts with Customer Success, "the mindset."

The Customer Success mindset means always thinking about your customer's point of view and how you can solve their real business problems in a timely manner. This is not a one-time thing, in fact, it's a long-term journey where you'll have to be continually adding value and adapting as your customer's needs and expectations change.



Mark Pecoraro

*Vice President at
Appcelerator*

The Customer Success mindset means always thinking about your customer's point of view and how you can solve their real business problems in a timely manner.



Every company out there will likely describe itself as "customer-centric," but the Customer Success mindset is something that can actually be felt throughout every department. Being customer centric might mean that you put your customers first, and listening to their feedback, but having the Customer Success Mindset means that you are constantly putting yourself in your customer's shoes.

Customer Success Throughout the Organization

Customer Success can't just be the domain of the Chief Customer Officer and the Customer Success team. Every department has a role to play. Here are a few examples:

Executive Staff

The entire senior leadership team must demonstrate their dedication to delivering customer value and creating long-term customer relationships.

This mind-set doesn't just happen. It really does start at the top. The CEO needs to set the example by spending time engaging with customers and learning what business needs they're trying to solve. The executive team should also be driving this Customer Success mindset throughout the organization. A Chief Customer Officer is a natural fit to be a powerful instrument to drive this mindset throughout the organization.

You can't just appoint a Chief Customer Officer or VP of Customer Success and think you've solved the issue



Appcelerator CEO Jeff Haynie is wildly passionate about Customer Success. The important thing is that he's not just talk; he's put his money where his mouth is. He's constantly interacting with clients to know what problems they're trying to solve. He's also invested in the proper resources and tools to make sure the Customer Success team can put the Customer Success mindset into action.

Zuora CEO Tien Tzuo is another great example of having the Customer Success mindset start at the top. As his company grew to hundreds of people in multiple locations, he wanted to make certain Zuora's customer-centric mission was felt throughout the entire organization.

At a corporate offsite, his team put themselves in their customers' shoes and thought

about what key business objectives they'd want from Zuora. He reorganized the company around these 9 Keys to Success to make sure that every department in Zuora is built around how it can service these objectives for its customers.

This mindset doesn't just happen. It really does start at the top.



Sales

It's tough for Sales to get out of the event mindset, and they should be happy when they close deals and sign contracts. But it's important for Sales to truly understand that signing is just a step along the journey with the customer. The days of winning accounts with expensive dinners and golf trips are over ... okay, almost over. Customers ultimately are going to choose based on relationships and products that really add value quickly, and continue to add value over a lifetime.

Sales leadership must incorporate the Customer Success mindset into its pre-sales processes and ideally have proper gates set up during the selling motion. Sales can also introduce the Customer Success process or team early in order to set expectations with the client.

Introducing Customer Success into a customer engagement during the presales process may rub some Sales people the wrong way at first, but they'll see the light. In a previous life, I did an analysis of the new customers we acquired and over half of them came from referrals or references from existing customers. This wouldn't be happening if existing customers weren't getting real value from the product.



Customers are going to choose based on relationships and products that add value over a lifetime...Successful customers lead to new business, which leads to a happy Sales team.

Product

The product is very, very important to Customer Success. You can have the best processes in place and the sharpest Customer Success Managers around, but it's not going to matter much if you have a dog of a product. If your product isn't adding value and solving real business needs, you need to rethink what you're doing.

You must build products with individual users in mind. It may sound elementary but having an intuitive user interface and a well thought-out user experience is vital. Of course, some B2B software requires complexity and favors function over form, but most modern business software can always be improved with the Customer Success mindset.

The Product team also must work closely with the Customer Success team to accurately represent the upcoming roadmap. The Customer Success team can serve as a valuable feedback tool for Product because they're in touch with end users. This also stresses the importance of clearly communicating the customer's needs back to the Product team.

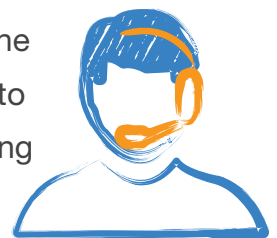


The Customer Success mindset means building a product that has an intuitive user interface and a well thought-out user experience.

Support

I'm a big believer that Customer Success department is NOT Customer Support, but having a robust customer support infrastructure is an imperative. If your customer support organization isn't running like a Swiss watch, your Customer Success team is too busy on break-fix activities instead of being able to add value.

Support needs to understand the role they play in serving the customer, not just looking at these issues as disconnected widgets to solve. Support can be given more context of the customer by being given insight into customer satisfaction information, as well as insight into the customer health score.



Marketing

Marketing is more than just generating leads and filling the top of that funnel, as it can play a key role in delivering customer happiness for life. In businesses with recurring revenue, marketing needs to understand that they have to focus on marketing to existing customers just as much as acquiring new ones.

One way to retain customers is by effectively communicating what your company's values are. This can be done through content marketing, social media channels, and through content that adds value to the customer's experience (Whitepapers, eBooks, webinars and user guides).

Can You Really Change Mindsets?

I've lived through executive mandates of "Customer Success" that were implemented by senior leaders who just didn't get it. They were staring at churn issues, facing pressure from the board and thought this was a simple solution. They never really changed their mindsets and embraced the customer-centric view.

But successful SaaS businesses know that strong Customer Success isn't a nice-to-have, it's a business imperative. Embracing the Customer Success mindset throughout the organization will lead to tangible improvements in retention, reduce churn, increase adoptions and present more upsells and cross-sells. This all leads to increased revenue.

Successful SaaS businesses know that strong Customer Success isn't a nice-to-have, it's a business imperative.

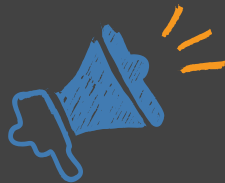


THE CUSTOMER SUCCESS MINDSET

Every department has a role to play in the ultimate success of the customer.



To truly be a customer-centric organization, you must constantly put yourself in the shoes of your customer.



Embracing the Customer Success Mindset throughout the organization will lead to increased revenue.





BUILDING A CUSTOMER SUCCESS FOCUSED COMPANY

Many people think the biggest challenge in scaling a company for growth is managing a rapidly expanding workforce.

It's not.

If you have the right hiring discipline, processes, and enablement, you can manage this growth without too much challenge.

The harder task is not to lose sight of your core principles.

As you get bigger, you inevitably lose the intuitive customer insight that you enjoyed as a small company. The problem is that customer insight defines your core principles. Lose one, and you lose the other.

So how do you build a focus on Customer Success into the very fabric of your people? How do you turn that focus into a framework that you can measure, organize around, and apply everywhere across the company?

Here's how my company, Zuora, came up with our applied framework. I'll also provide some suggestions that will (hopefully) help you create your own definition of Customer Success.

A Little Background

Customer Success is actually a relatively new concept. When I started at salesforce.com in the late nineties, it didn't even exist. There was barely any customer support! Service calls lasted hours, and a customer with a question was considered a resource drain at the end of a sales chain.

So what changed? We did. As consumers, we've become more informed and



Tien Tzuo

Founder & CEO of Zuora



demanding, and by a lot. We've shifted from buying products (DVDs, automobiles) to enjoying services (Netflix, Zipcar). In more and more aspects of our lives, we've separated the solution (a ride) from the device (a car). We're not as interested in managing the decline of physical assets anymore.

So, companies have had to pivot from selling products to managing services, and services require huge amounts of customer engagement. Product metrics like units, margins, and inventory have been replaced by relationship metrics like renewals, upsells, and churn. Companies are less concerned about the number of units shipped than the successful outcomes they deliver to each and every one of their customers.

How Do We Get Closer To Our Customers

Four years ago, Customer Success at my company was actually pretty easy. Zuora had a small office of less than thirty people. We had lots of insight into our customers, because there weren't that many of them, and there weren't that many of us! We also had a pretty straightforward billing product.

Today, it's a different story.

We now have over 400 employees around the world. We have lots of customers representing a broad array of industries, and our product is much more complex. It's a comprehensive back-office solution that handles a range of financial solutions for subscription-based businesses: commerce, billing, finance, etc.

At the end of the day, your core principles are defined by the unique value you provide to your customers.



A couple of years ago, we noticed that we were starting to lose touch with our customers. We were becoming siloed, and more focused on the metrics that mattered to our departments than the ones that mattered to our customers. And because our product did so much, it was hard for any single employee to understand

what we did for any customer.

So, we took our managers to an off-site in Sausalito, California, and tackled some existential questions: Who are we? What do we do? How do we get closer to our customers?



Our biggest challenge wasn't functional, but aspirational.

After three days of this stuff we were ready to strangle each other, but we came out of it with a pretty great vision. Our goal was to create “a world subscribed,” to help all companies transition from product to subscription models. We would help them grow by implementing smart pricing and sales strategies, *flow* by streamlining their back office, and *know* by providing them with the right metrics.

So we felt good about ourselves for a few weeks ... then we realized we still didn't have a plan. We needed a blueprint. How do we accomplish the goal? How do we actually help our customers?

This time there was no fancy offsite, just a whiteboard. We identified nine core processes. We help our customers *price, acquire, bill, collect, nurture, account, measure, iterate, and scale.*

Today we map pretty much everything we do against the 9 Keys.

These nine processes represented the nine keys to success in a subscription business. And there were precisely 9 keys. Not eight. Not ten. Nine.

But nine is still kind of a lot.

So we banged on it. We looked for the weak link. But every time we tried to pull one key out, the whole thing fell apart.

We decided to test it. We got 150 of our customers in a room, showed them the nine keys, and asked them to rank each one by importance.

It was a pretty even distribution ... almost scarily so. There were no clear losers.

We tested it again. We looked at all of our support cases on Zendesk, and mapped them against the 9 keys. Even distribution. We had our product managers test it against new feature requests. Even distribution.

Ultimately we arrived at 9 keys. They were comprehensive, mutually exclusive, and evenly distributed in relative importance.

So then what did we do? We went glamping.

How Glamping Transformed Zuora

We went to Costanoa Lodge, on the California coast halfway between San Francisco and Santa Cruz. They have tents, but they come with nice comfy mattresses and minibars (glamour + camping = glamping. Get it?). We took two hundred people.

We split into 20 groups and assigned each group to one of our actual customers. We gave them sales process material, professional service information, case support details, and everything else they'd need to walk in a customer's shoes. And we asked them to figure out the customer story against our new 9 Keys keys framework.

I had no idea if the exercise was going to work, but it turned into a transformational weekend for us. Everyone got into it. And the quiet departments (finance, engineering) taught the louder ones (marketing, sales) a lot in the process. Finally, we all had a common language.

Today we map pretty much everything we do against the 9 Keys: marketing collateral, employee onboarding, sales decks, support analyses, etc. It's a framework that runs through our entire customer engagement cycle.



Don't let your company develop products, business models and mindsets that no longer address the changing needs of your customer

Our account executives analyze new prospects against the 9 Keys to make sure we have an accurate cross-section of their business. All of our monthly product updates are measured against it. When we acquire a new customer, a write-up goes out to the entire company that describes that customer's aspirations against each of the 9 Keys. And, as you can imagine, this information is devoured by everyone.

Everyone knows the 9 Keys, from VPs to engineers to receptionists to product managers. We've got it on murals, postcards, and key chains. I even had it tattooed on the back of my neck (it may or may not have been temporary).

We've instilled the 9 Keys as a culture. And as a result, churn is down, customer satisfaction is up, and customer engagement is consistent.

Customer Success Framework:

- Recognize that one of the first victims of corporate growth is intuitive customer insight.
- Empower your employees to step out of their roles and truly see things from the customer's perspective: their goals, their aspirations, and their challenges.
- Boil down what you do for your customers into the fewest number of items possible, but don't make the breakdown so small that it fails to capture what's important. And then test those essential items like crazy against your customers and your proprietary data.
- Finally, discovering your framework is only half the job. Make sure you instill it into your corporate culture. Everyone has to be on board. This means getting every department to redefine what they do and how they do it around your Customer Success framework.

ZUORA'S 9 KEYS TO SAAS SUCCESS



PRICE

In the Subscription Economy, pricing and packaging is the most valuable strategic weapon.

ACQUIRE

Subscription businesses need to establish fast, simple, streamlined customer acquisition workflow across multiple channels.

BILL

Subscription businesses have to bill new customers at sale, prorate customers who sign up mid-month, bill existing customers at different times of the month, bill for usage and more.

COLLECT

Businesses deal with many more collections in the Subscription Economy, and the collections process is much more complex.

NURTURE

Adding new subscribers is critical, but in the Subscription Economy, 90% of customer transactions reflect changes to existing subscriptions.

ACCOUNT

The subscription delivery model poses new challenges for accounting and financial processes.

MEASURE

Subscription businesses want to drive accurate and timely decisions leveraging key metrics from bookings through revenue recognition that provide unparalleled insight into customer value and the financial health of the business.

ITERATE

The Subscription Economy has infinite pricing options, but customers will start simple and then iterate

SCALE

Subscription businesses need a reliable enterprise-grade system with services that are built on a secured, mission-critical and scalable infrastructure.

See more about the nine keys at www.zouora.com

At the end of the day, your core principles are defined by the unique value you provide to your customers. Don't let your company develop products, business models and mindsets that no longer address the changing needs of your customer.

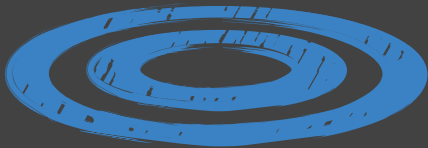
Because if you aren't focusing on Customer Success, you risk losing out to a company that does.

If you aren't focusing on Customer Success, you risk losing out to a company that does.



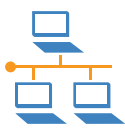
BUILDING A CUSTOMER SUCCESS FOCUSED COMPANY

As your organization grows, you cannot afford to lose sight of your core principles and lose the intuitive customer insight that you once had as a small company.



SaaS organizations must realize that they are not just selling a product, but they are managing services which requires a high level of customer engagement.





THE NETWORK EFFECT AND CUSTOMER SUCCESS

I'm a firm believer that having companies operate as a network unlocks the potential of a truly connected world. The network effect has important ramifications for all departments but Customer Success is well positioned to take advantage of it.

At its core, the network effect is tapping into the collective knowledge of larger groups to solve problems. It's about connecting beyond your walls and creating communities. This can inspire customers to think differently and connect in ways that are impactful to the bottom line.



Mike Grafham

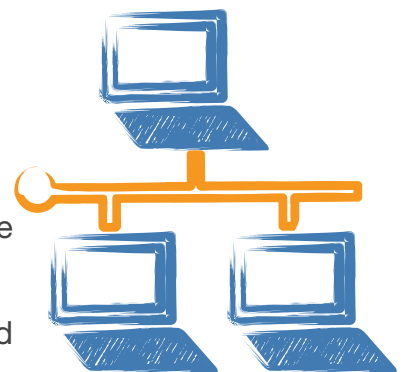
*Head of Customer Success
for Microsoft's Office 365*

Working like a network enables people to connect: they can connect to each other, to topics, interests and more. It flattens organizations and more easily reveals knowledge that already exists, but may not be well distributed. Employees also feel more engaged when they know their voices are truly being heard.

It's an approach that can benefit every type of business. You might imagine manufacturing and insurance as conservative industries that would struggle with this approach but Yammer now has two CIOs from these industries who are advocating the network effect.

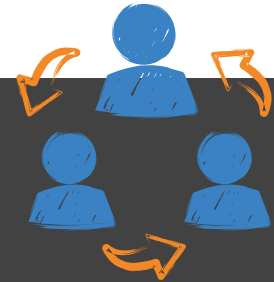
Benefits of the Network Effect

The Customer Success discipline is focused on helping customers achieve the outcomes that your service provides. Customer Success is a natural fit for working like a network because it interacts with multiple departments and is a trusted connection between vendors and customers.



Removing the barriers between departments empowers Customer Success teams with the ability to get information faster and easier. Whether you're triaging a customer complaint, connecting the right stakeholders or escalating an account, the network effect enables Customer Success to become more powerful facilitators. They may not own the answers but they create the conditions for answers to be found and for solutions to be developed.

Operating as a network has significant effects on customer retention, churn rates, cross-sells, upsells, and it can lead to more customer testimonials.



The network effect also delivers valuable insight into the culture and character of your organization. One recently hired Yammer Customer Success member tapped into our global network and was knowledgeable enough to start interacting with customers in roughly a month. At her previous position, the onboarding process took almost half a year. That's just a waste of time, money and effort.

The benefits of working as a network compound if your customers are doing the same. Break-fix issues that would have landed on the Customer Success manager's desk may be solved by the customer's network, allowing Customer Success to focus its energies on making customers happier and more productive.

The impact can and must be measured. Operating as a network has significant effects on customer retention, churn rates, cross-sells and upsells. Please do not discount the value of customer testimonial, either. These are your heroes who sell on your behalf through word of mouth..

How do Customer Success Management organizations maximize the network effect? A key component is implementing programs and tools that bring customers together in a network of expertise. From there, customers can learn first-hand the benefits of working like a network by crowdsourcing content and ideas, as well as experimenting with new ways to approaching adoption strategies.

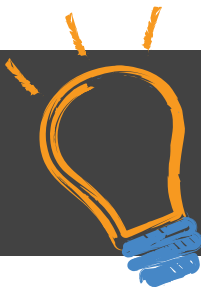
A key component is implementing programs and tools that bring customer together in a network of expertise.

The Network Effect in Action

We've seen this approach bear fruit rather quickly. A Project Manager from an international engineering organization based in the United Kingdom was looking for content and strategies to get his C-level executives onboard a new initiative. By his second post in the Yammer Customer Network, he received information to help with his meetings. Forty posts later, he was able to tap into ideas and strategies from people around the world to create an actionable plan that convinced his executives to implement the new initiative.

Working like a network can also lead to a virtuous cycle. A few weeks later, that same Project Manager shared back to the network his successful experiences convincing executives, as well as some pitfalls to avoid. That knowledge can then live on in other organizations and be adapted to suit individual use cases.

The Customer Success Manager wasn't actively involved in this process, as you'll be surprised by how many issues customers can solve on their own when they can tap into a network of expertise. With Customer Success Managers freed up from the heavy lifting of solving minor problems for customers, they're empowered to focus their time and energy on activities that deliver long-term value to the customer.



You'll be surprised by how many issues customer can solve on their own when they can tap into a network of expertise.

I fundamentally believe people prefer working as a network because it opens up lines of communications, exposes them to more knowledge, and it removes information

siloes, but change can be tough. The network effect encourages everyone to have a voice and that can lead to hesitation about that unpredictability.

One of the most important elements is for leadership to be actively involved in a sustained way.

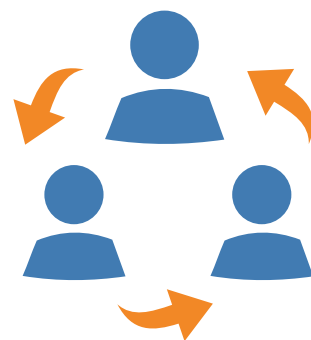
The Challenges

There are a few ways to address these challenges. One of the most important elements is for leadership to be actively involved in a sustained way. If executives aren't a visible and active part of the network, it's tougher for the rest of the organization to really buy in. You want leadership that's interested, not just interesting.

Another key factor of operating like a network is having trust in your employees to be able to do the right thing. Remember, working as a network doesn't remove your business processes, it just makes them more agile and open to more useful input.

If customers are self-organizing and connecting through new channels, the network effect can challenge existing Customer Success perceptions over who controls the customer journey. That's fine because it fits into the larger, more important goal of being in the business of making your customer successful.

To ease into the network effect, start off with smaller projects and measuring the success. Iterate where necessary, and you can overcome the suspicions and build trust with these success stories. Don't be surprised if a snowball effect occurs where the benefits quickly outweigh the fears.



THE NETWORK EFFECT AND CUSTOMER SUCCESS



Customer Success is well positioned to take advantage of the network effect, which taps into the collective knowledge of larger groups to solve problems.

As a Customer Success professional, take advantage of the fact that your department interacts with multiple departments and is a trusted connection between vendors and customers.

Sharing successful/unsuccessful experiences within your network can lead to more productive outcomes because you can learn from each other's experiences.





TURNING NEW CUSTOMERS INTO ADVOCATES

You've just been told that your company has signed its most important client to date. There may be many things running through your head: When do they want to start? Did sales promise them something that's not possible? How will I handle this on top of everything else?

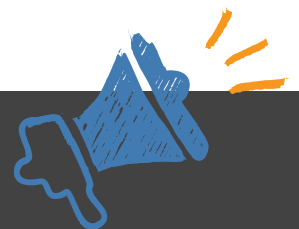


Chad Horenfeldt

Director of Customer Operations at Influitive

While you definitely need to dive into the weeds for a successful partnership, I believe you should have one main focus on your mind: How can I make this new customer an advocate of ours?

Customer advocates are the lifeblood of organizations: they will bring you new business, provide you with honest feedback and speak on behalf of you to anyone that will listen. Keep this one main goal of creating advocates in your thoughts and heart, and you will have the drive that you need to tackle the biggest challenges that come at you.



You have to assume the following: sales will always oversell and products will always have bugs.

A former executive of mine used to say, "You have to assume the following: sales will always oversell and products will always have bugs." Customer Success teams need to rise above this and provide the best possible experience for your customers that will make them successful and create customers for life.

Here are my top five tips for turning new customers into advocates:

Be Responsive

We're all busy and we all have competing priorities but you need to be responsive to your customers. If you can't respond right away, send them a quick note and let them know when you will get back to them. Better yet, look for new ways for them to get their questions answered such as help docs or submitting a question to a community.



Look for new ways for customers to get their questions answered such as help docs or submitting a question to a community.



Be Accountable

If your product experienced an issue or if you dropped the ball on a follow up item, take accountability for it. On the flip side, you should have processes and systems in place to keep yourself and your clients on track.

Show Value Early and to all Levels

It's not enough to just communicate to your customers and ensure that they are using your product. You need to ensure they are getting value. You also need to inform your main point of contact and the customer executive. Don't assume that your customer communicates internally. Additionally, if the customer isn't getting value, you need to inform both the main customer contact and the customer executive to explain what steps need to be taken to improve.

Always be Educating

Don't assume that your customers are reading all the emails your organization sends them. Think about what your customer's main objectives and challenges are, and focus on educating your customers on topics that will not only help them use your product more effectively, but will also help their career.

Focus on educating your customers on topics that will not only help them use your product, but will also help their career.



Recognize their Accomplishments

If you see that your customers are doing a great job using your product, make sure that you let them know and also let their managers know. It's not just a matter of recognition but also assurance that they are on the right track. It's your job to be their cheerleader. You should also try and help them win an industry award or your company's awards if you have them.

Turning these tips into a structured onboarding process can pay big dividends. Not only will customers be more likely to use your product, it can greatly improve the customer experience.

In fact, our client ReadyTalk was so pleased with its Influitive experience that it sent our team a box of gourmet donuts. The demonstration of appreciation really moved me, and the donuts were quite delicious.

You may have noticed that I intentionally skipped one of the most important elements of turning customers into advocates: being proactive. Why did I do this? Because being proactive is part of each of these tips and is a foundational element for customer success teams.

How will you know when your customer is an advocate? It's simple! All you need to do is ask them.

You can do this in a number of ways such as a Net Promoter Score survey or inviting them to join an exclusive customer advocate community such as Bomgar's Insider community. This part should be easy if you've taken the approach of focusing on creating advocates from day one of the customer relationship.

TURNING NEW CUSTOMERS INTO ADVOCATES



Customer advocates are the lifeblood of organizations: they will bring you new business, provide you with honest feedback and speak on your behalf.

Being responsive and showing accountability go a long way in establishing trust. Show value early in the relationship, educate your customers and recognize their accomplishments.



If you want to know if a customer is an advocate ... Ask them!



OWNING THE POST SALES EXPERIENCE

Structuring your Customer Success team correctly is one of the most important aspects of being a Customer Success leader but there's no silver bullet for how to do it. One of the factors I've found to be incredibly important is how a Customer Success team fits into the larger 'post-sales' experience, as well as the company as a whole.

There are many ways to organize a Customer Success team to deliver the desired internal and external goals. For the purposes of this post, my recommended approach is based on personal experience in the enterprise software space, specifically for early-stage startups that are between 50-500 employees (and growing). This approach may or may not apply to your own circumstances, but I think many of the key themes can be universally applied to other company scenarios.

First, it's important to define the role and goals of the Customer Success team before getting into a discussion of how to organize it. In my experience, the Customer Success organization should be focused on providing customers with the best services, support, training, account management and best practices guidance to help them in all aspects of their post-sales experience.



Mike McCarron

Vice President of Customer Success at Mobile Iron

The Customer Success org should be focused on providing customers with the best services, support, training, account management and best practices guidance to help them in all aspects of their post-sales experience.



If the Customer Success organization doesn't own the complete post-sales customer experience, then alignment on key initiatives and strategies may not happen. This clearly diminishes the ability for the team to achieve its goals.

It also delivers an incredibly powerful message to your customers to say that there is a focused group, with specialized skills, committed to making them successful. That's a powerful message when trying to differentiate why your company and product are better than the competition.

Externally, it results in happy customers who are engaged with us, are using a broad range of products and services, will act as references, and come back to buy more products and services in the future. In short, they are sticky customers who continue to spend money with us.

Internally, it results in the aforementioned recurring revenue stream of maintenance and subscription renewals. It also allows for incredible insight into how customers use the product, what challenges they face, and how we as an organization can build tools, collateral, and templates to help the next wave of customers accelerate their own deployments of the product, based on the lessons learned by those who we have helped in the past.

Define the role and goals of the Customer Success team before getting into a discussion of how to organize it.



With this as a foundation upon which to build a team, the structure, skill sets, and overall responsibilities of the team members become more and more clear. Here is how I have set up my team to accomplish these goals. There are six distinct teams within my Customer Success organization (although when we first started we all wore many hats and did parts of each role):

6 DISTINCT TEAMS IN THE CUSTOMER SUCCESS ORGANIZATION

- **Professional Services** - This includes Technical Implementation/Tools and Business Advisory Services to implement, configure, and get customers pointed in the right direction.



- **Customer Support** - Global 24 x 7 support organization that handles all cases, calls, and escalations from customers who have completed their implementation.



- **Education & Training (includes Technical Publications)** - Handles the development and delivery of training collateral, courses, and documentation, including instructor-led training and online-recorded training.



- **Customer Advocacy (These are the traditional CSMs discussed in the other posts)** - Post sales account management and “voice of the customer” to handle the customer experience and drive meaningful relationships.



- **Customer Programs** - Tasked with special projects, initiatives, and early-stage exploratory activities. Think of this group as what the CTO team might be for an engineering organization: big-picture thinking and ideas.



- **Operations** - Operations support to keep the trains running and the business flowing as we grow. Don't underestimate the need to have a strong operations person (or team) to manage the logistics of running a strong Customer Success organization.



Why organize this way? By having the Customer Success team be responsible for all post-sales activities, it aligns everyone in the group toward the stated goals outlined at the beginning of this post. We want our customers to have the best possible experience across all of the services we provide, and rolling that up into a single group, with a single owner, provides a consistent message to customers that we are focused on their success through each stage of the post-sales lifecycle.

It also fosters a lot of collaboration and encourages teams to leverage common sets of tools, collateral, and best practices. For example, the trends and issues that our support organization sees from customer escalations can be routed directly to our Product Service and Education teams to ensure that we are addressing possible deployment issues during the rollout. This can also be rolled in to advanced training materials for ongoing customer education if there are things that customers continue to struggle with.

As I mentioned before, I've had success with this type of structure in the enterprise software space but if there's one key takeaway: Make sure your team is working closely together and aligned to a common set of goals.

If this isn't the case, they will not be able to deliver the level of service you want, nor will the customer get the best possible experience from the team that they want.



OWNING THE POST SALES EXPERIENCE

Define the goals of your Customer Success team before determining the organizational structure.

The Customer Success team should be focused on providing customers with the best services, support, training, account management and best practices guidance to help them in all aspects of their post-sales experience.

When Customer Success owns the post-sales experience, it delivers powerful message to the customer that says there is a focused group, with specialized skills, committed to making them successful.





THE SAAS COMPANY BOARD PACK

Board meetings are where companies tackle their biggest issues. In this post, we'll review the critical elements and best practices of a SaaS business board pack (the pack of information sent by a company to the board prior to each board meeting), and the integral role that Customer Success plays in the process.



Matthew Howard

*Managing Partner
at Norwest Ventures*

By their very nature, SaaS businesses must stay focused on a different set of metrics than traditional software companies. For instance, it can take SaaS businesses over a year to recoup the cost of acquiring customers, so simply looking at income statements doesn't give you true insight into the health of a company.

The actual board meeting should be focused on important issues instead of just trying to digest data. Work with your board in advance of the meeting to agree on some key metrics and KPIs, and then trim out unnecessary details. Make sure to distribute the key metrics a few days in advanced so that board members have a chance to review.

It's important to remain grounded to ensure as little distortion as possible in the projections: source high-fidelity numbers and metrics as soon as possible.



You should also agree beforehand on the preferred formatting of the board pack. At NVP, we're partial to waterfall charts since they quickly visualize the progress (or lack thereof) a company is making. Whatever you decide to incorporate, make sure that you stick to the important information – no one enjoys a PowerPoint marathon.

Key SaaS Financial Metrics

We look at a few key SaaS financial metrics when deciding on investing in a new SaaS business or assessing the progress of an existing portfolio company:



Recurring Revenue

This is the lifeblood of SaaS businesses, so we naturally pay close attention to this metric. The Monthly Recurring Revenue (MRR) over time and the current Annual Recurring Revenue (ARR) are all extremely important figures to review. So, don't skimp on details when it comes to revenue figures.



Average Deal Size

Most boards want to know the average deal size, unit economics, the gross margins per deal, and the annual contract value (ACV). You should also highlight your ability to grow revenue from existing customers, so be sure to include your current upsell and cross-sell numbers, as well as reasonable projections for future quarters.



Cash Flow

Growing quickly can exacerbate cash-flow problems in SaaS businesses because the cost to acquire customers (CAC) can rapidly grow and immediate revenue may not keep pace. The business may need to invest upfront to acquire customers. Because of this, the payback period is vital to include in your board pack.

Painting a Rosy Picture

It's easy to paint a rosy picture with projections during new company formation. As a result, it's important to remain grounded to ensure as little distortion as possible in the

projections. Source high-fidelity numbers and metrics as soon as possible in order to gain a realistic assessment of the company. With this insight, you can take the proper actions needed to course correct and push the company forward.

In practical terms, this means making sure your CAC is calculated on a fully-loaded basis with the true marketing and sales costs baked in. We would also recommend looking at payback accounting for gross margins. You can make aggressive assumptions with your growth projections but make sure they're grounded in some sort of data-driven reality.

Hiring is one of the most difficult aspects of scaling up any business, so we like to keep an eye on some of these metrics as well. Is the company hitting its hiring goals? What's the attrition rate for new hires? Are the sales reps hitting their quotas?

We also like to gain insight into the marketing function, including all of the standard funnel metrics. What's the velocity of leads? What are your conversion metrics? How has this tracked over time?

Churn and Lifetime Value

There are multiple ways to measure churn, so it's critical to agree on the exact way to measure so that all future measurable can be compared on an apples-to-apples comparison.

Churn is one of the most important metrics when we look at investing in a new SaaS business...a 5% monthly churn rate will wind up losing half of its customers over the year.

Churn is one of the most important metrics when we look at investing in a new SaaS business and is a major indicator of how well SaaS portfolio business is doing. Think

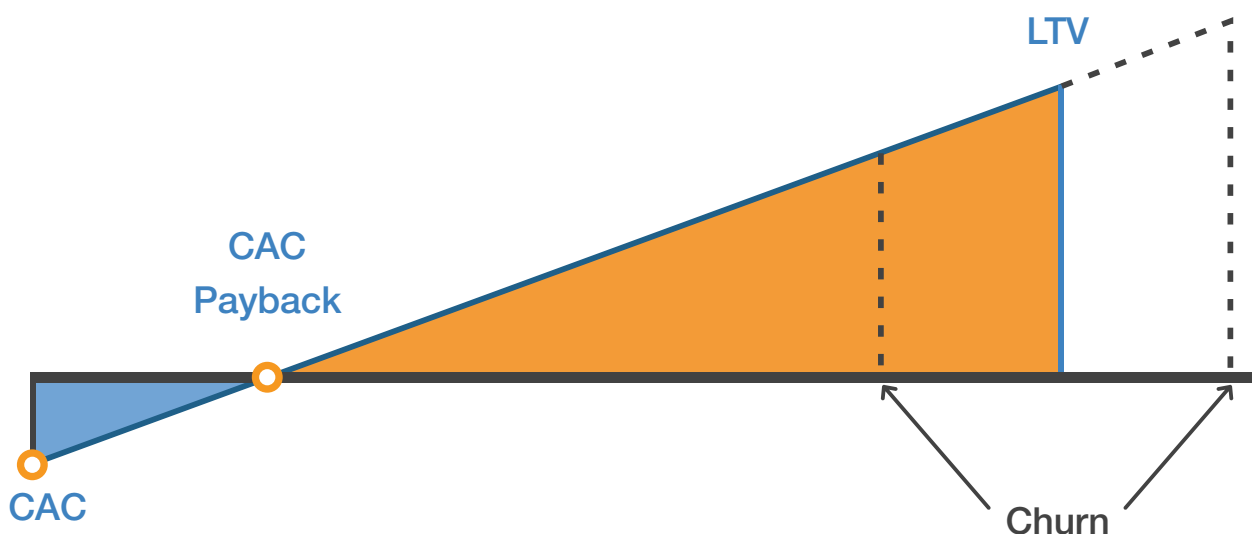
about it: a company with a 5% monthly churn rate will wind up losing half of its customers over a year.

Ideally, you want 0% or negative churn but that's not always possible. For businesses selling to large enterprises, churn should be relatively low. For larger deals, ideally churn should be lower. If you are selling to SMBs, churn will naturally be higher as smaller businesses will have natural attrition from acquisitions and or going out of business. There's a higher threshold for SaaS organizations that are B2C.

The overall churn rate is important but it's not the only churn metric we care about. The sheer number of companies lost (logo churn), as well as the average revenue these lost companies were bringing in are all incorporated our churn analysis. That's why you should measure logo churn as well as revenue churn. Finally, you could also measure revenue churn incorporating any upsells.

Once you have your churn figures, you can effectively calculate Customer Lifetime Value (LTV). In general, if the LTV is 3X or better than the fully-loaded CAC, your business should be in good shape.

REDUCTION IN CHURN GROWS LIFETIME VALUE OF CUSTOMERS



The Importance of Customer Success

At NVP, we're fans of companies that are proactive and make an early investment in Customer Success.

***The Net Promoter Score is an important figure
but it's not necessarily a proactive tool.***

In many ways, it's already too late in the customer lifecycle to be asking the customer, "Are you happy?"

Think about it like a bad review on Yelp. We know how damaging these can be to establishments. If businesses had a way to intervene before the customer had a negative experience, you can bet that they would. Customer Success isn't just a nice feature to have for SaaS businesses, it's a crucial way for them to engage at-risk customers before it's too late.



* Norwest Venture Partners is an investor in Bluenose

THE SAAS COMPANY BOARD PACK

SaaS businesses must stay focused on a different set of metrics than traditional software companies – those metrics that are tied to delivering continuous value.



The Key SaaS Financial Metrics are: Recurring Revenue, Average Deal Size, Cash Flow, Churn and Lifetime Value.



Churn is becoming one of the most important metrics because it determines the lifetime value of the customer and whether or not a company can recoup their costs of customer acquisition.



CONCLUSION

It should be abundantly clear by now: Customer Success is an economic imperative if you have a SaaS business. A Customer Success team that's running on all cylinders can improve retention rates, reduce churn, boost upsells, and help identify advocates. All of these activities have quantifiable impacts on the top and bottom line.

The discipline of Customer Success was almost completely unknown a decade ago but it is now one of the fastest-growing fields in technology. Part of that explosive growth means that it is still an emerging field, so best practice doctrines may evolve.

This eBook is just the beginning. Bluenose is committed to providing the latest insights and best practices around Customer Success from a wide swatch of industry leaders.







MAKE YOUR CUSTOMERS LAST A LIFETIME™

ABOUT BLUENOSE

Bluenose is a Customer Success platform that empowers SaaS businesses to proactively manage customers through complete visibility, a robust early warning system, and built-in playbooks. For more information, **visit www.bluenose.com**.

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