



LIGHTNING CASE STUDIES (06/10/20)

Building a successful handover process from Sales to Customer Success at GoCardless

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The Challenge:

The transition from Sales to Customer Success is a **critical moment in the customer journey**, don't miss it!

When: contract signed, **the account needs to be handed over from the Sales Executive to the CSM**

Pains we had:

- Lack of collaboration between the Sales team and Customer Success team: 2 siloed teams
- Lack of communication from Sales to CS about the customer's expectations
- Lack of visibility for the customer about the next steps

Results

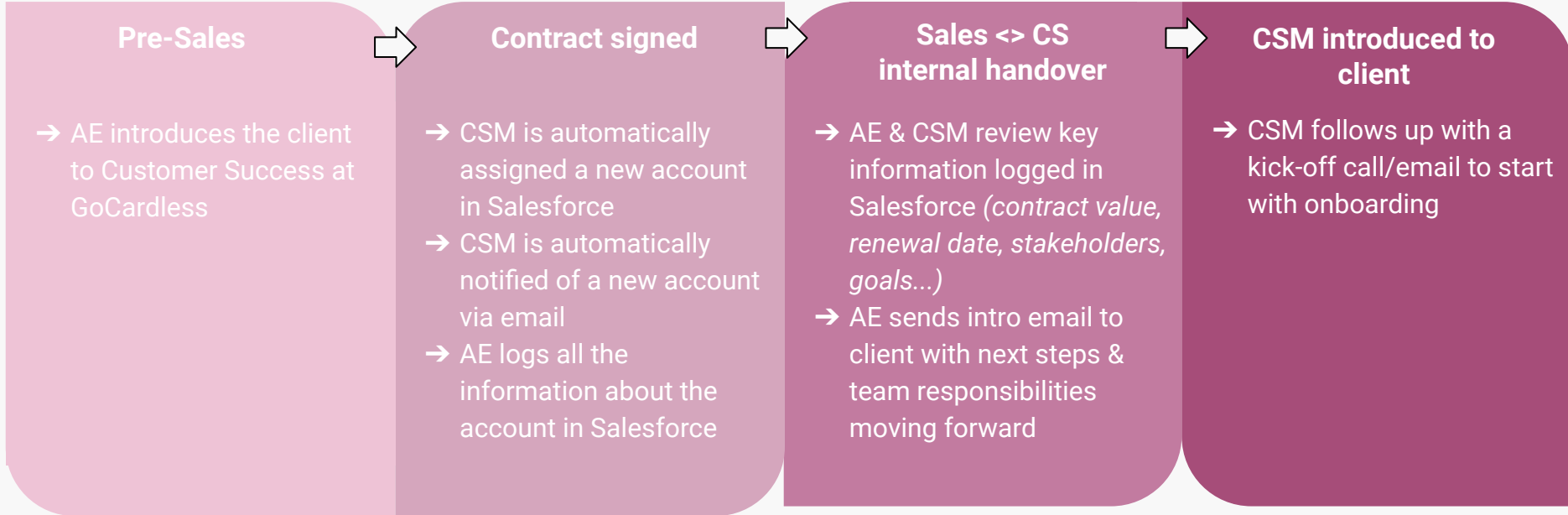
- Poor customer experience
- Poor product adoption
- Company's reputation damaged
- Missed revenue (retention & upsell)

How to create a successful handover process between Sales and Customer Success ?



The Plan

Building a joint handover process between Sales and Customer Success: steps we created at GoCardless



Impact: a process mutually beneficial for AEs and CSMs

Metrics tracked and results:

Operations

- Reduction of time to hand over a client from 6 weeks to 2 weeks
- Number of Success Plan completed in first 3 months: 100%

Revenue

- Churn in first 9 months: 0%
- Increase number of revenue opportunities identified in first 12 months (expansion & upsell)

Advocacy

- Increase number of customer stories in first 12 months
- NPS (new customers): 70



Results & learnings

"The seeds of churn are planted early" (Lincoln Murphy)

'Dos'	'Don'ts'
<ul style="list-style-type: none">✓ Communicate about the process internally✓ Get team members and leadership buy-in in the process✓ Educate about Customer Success internally & externally✓ Make sure clients' goals have been captured✓ Always put yourself in the customer's shoes	<ul style="list-style-type: none">✗ Use a case-by-case scenario for assignment✗ Make assumptions (customer needs and engagement)✗ Wait for customer to reach out✗ Make it a Customer Success topic only

